

This isn't about doing HubSpot "right."

→ It's about understanding where adoption has plateaued.

Read across each dimension and assign a score that reflects your current operating reality. Most organisations cluster – and that clustering tells you what to prioritise next.

Domain

0 Not in place 1 Basic 2 Operational 3 Optimised/AI-Enabled

Domain	0 Not in place	1 Basic	2 Operational	3 Optimised/AI-Enabled
Data Foundation & Consent ✓ Deliverability ✓ Compliance ✓ Trusting in Reporting	Fragmented data, unclear permissions	Basic properties, partial consent tracking	Governance defined; segmentation workable	Consent + lifecycle + governance enable AI + reporting confidence
Segmentation ✓ Targetability ✓ Relevance ✓ Efficiency	One-size-fits-all audiences	Static lists used occasionally	Active segments used systematically	Predictive / behavioural segmentation drives next-best actions
Automation & Lifestyle ✓ Scale without Headcount	Mostly manual execution	A few workflows	Lifecycle automation across key journeys	AI-assisted optimisation + robust testing discipline
Personalisation ✓ Conversion Lift ✓ Experience Quality	Generic messaging	Basic personalisation	Smart content by lifecycle/segment	AI-guided personalisation at scale with governance
Reporting & Executive Visibility ✓ ROI Narrative	Reports not trusted	Basic dashboards	KPI reporting aligned to funnel	Forecasting + insight automation (decision velocity)

Adoption Maturity Table

Most teams sit between levels. The opportunity lies in knowing where value is being capped — and what to prioritise next.



0-1 Mostly 0s and 1s

Value is being capped at the foundation level

HubSpot is operating as a set of tools rather than a managed growth system. Data, consent and processes are fragmented, limiting automation, reporting confidence and any meaningful use of AI.

Typical Outcomes:

- High Manual Effort
- Low Trust in Reporting
- Weak or unclear ROI narrative
- Platform value frequently questioned

2 Mostly 2s

HubSpot works — but momentum is plateauing

Core capabilities are in place and support day-to-day execution, but value is driven by effort rather than leverage. This is where many teams stall: operationally sound, but not evolving.

Typical Outcomes:

- Consistent execution, limited scale
- Automation exists but isn't optimised
- Reporting informs decisions, but doesn't accelerate them
- AI potential recognised, not realised

3 Mostly 3s

HubSpot is functioning as a growth engine

Strong foundations and disciplined adoption enable advanced automation, confident reporting and practical AI use. Value compounds as teams move faster without adding complexity or headcount.

Typical Outcomes:

- Scalable growth without proportional headcount
- High confidence in insights and forecasting
- AI embedded into everyday workflows
- Clear, defensible ROI narrative