CHECKLIST · FIELDWORK

HUBSPOT RENEWAL CHECKLIST

Fifteen things to check before you renew, so you only pay for what you use. Start about six weeks before your renewal date; some changes need notice.

CONTACTS AND BILLING

- [ ] **Count marketing contacts you haven't emailed or who haven't opened in 12 months**
  These are the usual biggest saving. Set them to non-marketing before renewal.
- [ ] **Find hard bounces and unsubscribes still set as marketing**
  You're paying for people you legally or technically can't email.
- [ ] **Check what sets contacts to marketing automatically**
  Forms, imports and integrations often do it by default, so the number creeps back up.
- [ ] **Merge duplicate contacts**
  Each duplicate can count as another marketing contact.
- [ ] **Work out your contact tier after clean-up**
  HubSpot bills in blocks. You only save if you drop under a block boundary.

SEATS AND USERS

- [ ] **List seats nobody has used in 90 days**
  Reassign them or drop them at renewal.
- [ ] **Move people who only look at data to view-only seats**
  View-only seats don't cost anything.
- [ ] **Remove leavers**
  People who've left still holding paid seats is very common.

- [ ] **Count your super admins**
  Not a cost, but if it's more than three, fix it while you're in there.

TIER AND ADD-ONS

- [ ] **List add-ons and check each is used**
  Things like a dedicated IP, extra domains or extra credits get bought for a project and forgotten.
- [ ] **Check which paid features you actually use**
  If a hub is on Professional but only uses Starter features, ask about dropping it.
- [ ] **Look at your credit usage**
  Make sure you're not paying for far more than you use.

BEFORE YOU SIGN

- [ ] **Find your renewal date and notice period**
  Check your contract for how much notice you need to reduce anything. Reductions usually only apply at renewal.
- [ ] **Ask for a usage breakdown before the quote**
  Your account manager can show seat and contact usage. Get it before you talk numbers.
- [ ] **Ask about discounts for paying upfront or committing longer**
  Only worth it once the clean-up is done and you know what you need.

Fieldwork · Independent HubSpot admin · fieldworkops.co.uk · gerard@fieldworkops.co.uk

Want it done for you? The Spend Audit covers all of this. If I don't find £495 a year you can cut, you don't pay.