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The 2026 HubSpot CRM Audit Checklist

47-point checklist for identifying CRM data quality, automation, reporting and configuration problems.

Use this checklist to identify duplicate contacts, incomplete properties, broken workflows, lifecycle-stage inconsistencies, tracking issues, and other common HubSpot CRM problems. Print it, then work through each section and tick the boxes as you go.

1 Contacts

9 checks

- [ ] **Check for duplicate contacts**
  Use Reporting → Data Quality (Command Center) and Contacts → Actions → Manage Duplicates. When merging, keep the record with the richest history as the master.
- [ ] **Review contact property fill rates**
  Check completion of key fields (email, name, phone, lifecycle stage, source). Low fill rates quietly break segmentation, scoring, and reports.
- [ ] **Identify incomplete records**
  Build a list of contacts missing critical properties so you can enrich, route, or suppress them.
- [ ] **Review lifecycle stages**
  Confirm every contact has a stage, none are stuck or skipping stages, and stage-setting isn't being overwritten by conflicting workflows.
- [ ] **Review contact sources**
  Audit Original Source values for accuracy. Spikes in “Offline Sources” or “Unknown” usually signal tracking or import problems.
- [ ] **Check marketing contact status**
  Review who's set as a Marketing Contact — you pay for these. Set non-engaging contacts to non-marketing to control cost.
- [ ] **Check subscription & consent status**
  Verify subscription types and legal basis (GDPR) are set correctly, and flag contacts with no consent on record.
- [ ] **Review bounced & unengaged contacts**
  Find hard-bounced and long-unengaged contacts (Marketing → Email → Bounced). They inflate counts, raise cost, and drag down deliverability for the whole portal.
- [ ] **Check contact ownership**
  Identify unassigned contacts and contacts still owned by deactivated users so leads don't fall through the cracks.

2 Companies

6 checks

- [ ] **Check for duplicate companies**
  Use the Data Quality tool and Manage Duplicates. Consolidate so associations and account reporting stay accurate.
- [ ] **Review company associations**
  Find companies with no associated contacts or deals, and contacts not linked to a company. Use advanced filters to surface orphan records.

- [ ] **Check company domains**
  Verify the domain field is populated and valid — it drives HubSpot's automatic company association and enrichment.
- [ ] **Review company properties**
  Check fill rates and consistency on key firmographic fields (industry, size, region, revenue).
- [ ] **Review parent/child hierarchies**
  Confirm multi-entity accounts use parent–child relationships so reporting rolls up correctly.
- [ ] **Check company ownership**
  Identify unassigned accounts and companies still owned by former team members.

3 Deals

8 checks

- [ ] **Review deal pipelines**
  Ensure each pipeline maps to a real sales process. Retire unused or duplicate pipelines that fragment reporting.
- [ ] **Check deal stages**
  Confirm stage names are clear, exit criteria are defined, and stage probabilities reflect reality for accurate forecasting.
- [ ] **Review required properties**
  Require key fields (amount, close date, deal source) at the right stages so reports aren't full of blanks.
- [ ] **Check abandoned / stale open deals**
  Find open deals with no recent activity — “rotting” deals distort your pipeline value and forecast.
- [ ] **Review deal ownership**
  Identify unassigned deals and deals owned by reps who've left.
- [ ] **Check close dates**
  Flag open deals with close dates in the past — they need re-dating or closing to keep forecasts honest.
- [ ] **Review deal associations**
  Confirm deals are linked to the right contacts and companies for attribution and reporting.
- [ ] **Validate deal amounts & forecast**
  Check for zero or blank amounts and outliers that skew pipeline value.

4 Workflows

8 checks

- [ ] **Review active workflows**
  List every active workflow and confirm each still matches a current process. Archive what's obsolete.
- [ ] **Identify workflows with errors**
  Check the workflow health surfaces for failed actions, API errors, and unresolved issues.
- [ ] **Check enrollment triggers**
  Verify triggers aren't too broad or too narrow, and that they rely on stable, well-maintained properties.
- [ ] **Check re-enrollment settings**
  Confirm re-enrollment is intentional — accidental re-enrollment causes repeat emails and automation loops.

- [ ] **Identify redundant / conflicting workflows**
  Find multiple workflows editing the same property (e.g. lifecycle stage) and overwriting each other — a top cause of “invisible” leads.
- [ ] **Review suppression, goals & unenrollment**
  Check suppression lists, goal criteria, and unenrollment logic so contacts exit workflows cleanly.
- [ ] **Check workflows owned by deactivated users**
  Reassign automation owned by people who've left before it silently breaks.
- [ ] **Review naming & folder structure**
  Consistent naming and folders keep automation auditable and prevent duplicate builds.

5 Reporting

8 checks

- [ ] **Review dashboards**
  Identify which dashboards are actually viewed and by whom. Consolidate or remove the rest.
- [ ] **Check attribution**
  Confirm attribution models and source data are configured for how you actually evaluate channels.
- [ ] **Verify conversion tracking**
  Check the tracking code is installed site-wide and key conversions and forms are recording correctly.
- [ ] **Check reporting filters**
  Validate that report filters (date ranges, owners, pipelines) aren't silently excluding data.
- [ ] **Remove obsolete reports**
  Delete or archive stale reports, including any owned by departed employees.
- [ ] **Verify UTM & campaign tracking**
  Standardize UTM parameters and confirm campaigns capture source data consistently.
- [ ] **Validate key metric definitions**
  Make sure critical metrics (MQL, SQL, pipeline) have one agreed definition across every report.
- [ ] **Check data sync into reports**
  Confirm integrated data (ads, Salesforce, etc.) is flowing into the reports that depend on it.

6 Data Quality

8 checks

- [ ] **Run the Data Quality Command Center**
  On Pro/Enterprise, use it to auto-surface duplicates, formatting issues, and property problems with a score you can track over time.
- [ ] **Identify duplicate records across objects**
  Beyond contacts, dedupe companies and deals — duplicates fragment history and distort reporting.
- [ ] **Standardize naming conventions**
  Apply consistent naming to properties, pipelines, lists, and workflows so the portal stays navigable.
- [ ] **Review property values**
  Clean up dropdown/select options — merge near-duplicates and remove obsolete values that break segmentation.

- [ ] **Identify unused / redundant properties**
  Consolidate overlapping custom properties and remove fields nothing uses — especially any referenced in workflows or reports.
- [ ] **Review data formatting**
  Standardize phone numbers, name capitalization, and country/region values (Data Hub or programmable automation can enforce this on entry).
- [ ] **Review data enrichment**
  Check enrichment coverage so firmographic and contact fields stay complete and current.
- [ ] **Review integration sync health**
  Audit connected apps: sync direction, field mappings, ownership transfer, and error handling. Disconnect tools you no longer use.

Need help auditing your HubSpot portal?

digital MKT helps businesses identify CRM data quality issues, workflow problems, tracking gaps, and opportunities for optimization.

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