The HubSpot portal audit, in 25 checks.

A portal that has been live for a year or more carries duplicates, stages nobody agreed, workflows built by people who have left and properties nobody fills in. This checklist walks the portal in the order that matters: records first, then stages, routing, workflows, and last the properties, reports and the bill. Some features named here depend on your HubSpot tier.

1
Work in the portal
Tick a check only when you can open the list, setting or report that proves it.

2
Write down each miss
Every unticked check is a finding. Page 3 has a table for them.

3
Rank before you fix
Order the findings by their effect on the numbers leadership uses.

PART 1 OF 5

Records: what everything else is built on

Bad record hygiene quietly breaks every list, workflow and report built on top of it.

- [ ] 01 You know roughly how many **duplicate contacts and companies** exist, and who merges them.
- [ ] 02 Contacts with **no associated company** are a small, known number.
- [ ] 03 **Company domain name** is filled in, since HubSpot uses it to link contacts to companies when automatic association is on.
- [ ] 04 Every company and open deal has an active owner. **Nothing belongs to a deactivated user.**
- [ ] 05 People who filled in a form carry a real original source, and you know how much of **Offline sources** is imports.

PART 2 OF 5

Lifecycle and deal stages: do they match what happened

HubSpot does not move a lifecycle stage backward for you, so stages drift away from reality unless someone checks.

- [ ] 06 Companies that bought are marked **Customer**.
- [ ] 07 Companies marked **Opportunity** have an open deal.
- [ ] 08 Each deal stage has written entry rules, and the properties that prove them are **required at that stage**, where your tier allows.
- [ ] 09 Closed lost deals carry a **lost reason from a dropdown**, not free text.
- [ ] 10 Open deals with **a close date in the past** are re-dated or closed on a schedule.

PART 3 OF 5

Routing and response: who gets the lead, and when

Most of a lead's wait happens before a rep knows the lead exists.

- [ ] 11 Every form lead gets an owner, and you know how many from the last quarter **have none**.
- [ ] 12 You can see how long a new lead waits **for an owner and for a first touch**.
- [ ] 13 Assignment rules cover time off, territories and **reps who have left**.
- [ ] 14 Reps log calls and emails in HubSpot, so **Last contacted** means something.
- [ ] 15 New-lead notifications go **where reps actually look**.

PART 4 OF 5

Workflows: what is still running

Two workflows that set the same property will overwrite each other, and neither will report an error.

- [ ] 16 Every active workflow is listed: **what enrolls records, what it changes, who owns it**.
- [ ] 17 No two workflows **set the same property**.
- [ ] 18 Workflows built by people who have left have a current owner, or are **switched off**.
- [ ] 19 Every integration that writes to HubSpot is listed with **the properties it writes**.
- [ ] 20 A workflow change is tried on **a test record** before it goes live.

PART 5 OF 5

Properties, reports and the bill

Properties that are empty on most records, and the reports built on them, are the clearest candidates for cleanup.

- [ ] 21 Custom properties that are **empty on nearly every record** are archived, or have an owner who fills them.
- [ ] 22 Properties that rules depend on are **dropdowns with fixed values**.
- [ ] 23 You know which dashboards leadership opens, and **each number traces to a property**.
- [ ] 24 If you pay by marketing contacts: contacts that hard bounced, unsubscribed or have no email are **not still set as marketing contacts**.
- [ ] 25 **One named person** owns the portal: properties, permissions and user seats.

Your findings, ranked before you fix.

Write each unticked check here, put a cost beside it in your own terms (deals, hours, forecast error or subscription cost), and give it an owner. Fix in the order below, not in the order you found them.

#	FINDING (UNTICKED CHECK)	WHAT IT COSTS	OWNER	FIX	BY WHEN
1					
2					
3					
4					
5					
6					

WHAT TO FIX FIRST

The order we work in

1. **Part 1.** Records first. Merging and reassigning changes every count that follows.
2. **Part 2.** Then lifecycle and deal stages, so the pipeline and the forecast mean one thing.
3. **Parts 3 and 4.** Routing and workflows next, once the records they act on are clean.
4. **Part 5.** Properties, reports and the bill last, when you know what is actually used.

This order is our working practice, not an industry benchmark.

GO FURTHER, FREE

Related reading and tools

How to audit a HubSpot portal, step by step

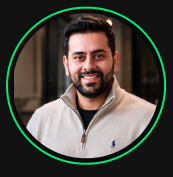
How to set up lead routing in HubSpot

AI inside HubSpot: what we build, and what we plan around.

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zRev AI builds AI into the sales and marketing systems B2B software companies already run, inside their own HubSpot or Salesforce. Shivil spent a decade in M&A integration, global operations and FP&A before founding it.

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