The RevOps audit, in 25 checks.

A RevOps audit asks one question: can the systems behind your revenue be trusted to carry the next decision? This checklist tests the CRM data, the stage definitions, lead routing, reporting and the forecast against real deals, because a process document describes intent and the records show what happens. It works for HubSpot, Salesforce or any other CRM.

1
Use real deals
Pull a sample of recent won and lost deals. Tick a check only when the records prove it.

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

3
Rank by cost, not count
A short list ordered by what each finding costs beats a hundred-row spreadsheet.

PART 1 OF 5

Data: can the records be trusted

Everything else in the audit reads these records. If they are wrong, every report and rule built on them is wrong with confidence.

- ☐ 01 You know the **duplicate rate** for contacts, companies and deals, and a rule stops new duplicates being created.
- ☐ 02 Every contact belongs to a company, and every company and open deal has **an active owner**.
- ☐ 03 The fields that routing, scoring and reporting read are filled on most records, and you can **name the fill rate** of each.
- ☐ 04 Each key field has one written definition and **fixed values**, not free text.
- ☐ 05 A sample of closed deals matches reality: **amount, close date and source** agree with the contract or the invoice.

PART 2 OF 5

Stages: does the pipeline mean one thing

Stages that can be skipped, or entered without evidence, make the forecast optimistic.

- ☐ 06 Each stage has **written entry and exit rules** that every rep applies the same way.
- ☐ 07 Required fields stop a deal moving forward **without evidence**.
- ☐ 08 A skipped stage shows up on a report. It does not pass silently.
- ☐ 09 Closed lost deals carry a reason from **a fixed list**, filled in at the time.
- ☐ 10 Lifecycle stages between marketing and sales have one agreed definition, and they **match what happened**: companies that bought are marked as customers.

PART 3 OF 5

Leads: routing and response

A lead with no owner, or an owner who has left, is revenue waiting in a queue nobody is watching.

- [ ] 11 Every new lead gets **a named owner automatically**, and you know how many do not.
- [ ] 12 You measure the wait from form to owner, and from owner to first touch, **as a median**.
- [ ] 13 Leads that arrive out of hours, or fall outside every territory rule, have **a tested path**.
- [ ] 14 When a rep leaves, their records are reassigned **by a process**, not left under a deactivated user.
- [ ] 15 Sales and marketing agree in writing what happens to **a lead sales rejects**.

PART 4 OF 5

Reporting and forecast: one number, one answer

If two people asked for the same number get different answers, leadership is deciding on whichever one arrived first.

- [ ] 16 You can list the reports leadership actually opens, and **trace each number** to the field it reads.
- [ ] 17 Pipeline, win rate and cycle length each have **one definition** and one source report.
- [ ] 18 The forecast is built from stage and close date **by a written method**, not from each rep's feeling.
- [ ] 19 Each month the forecast is **compared with what closed**, and the gap is explained.
- [ ] 20 Open deals with a close date in the past, or no recent activity, are **reviewed on a schedule**.

PART 5 OF 5

Automation and ownership: who changes what

Automations built by people who have left are a common source of surprises, and AI added on top inherits all of them.

- [ ] 21 Every active automation is listed: **what triggers it, what it changes, who owns it**.
- [ ] 22 No two automations **write to the same field**.
- [ ] 23 For each field that several systems touch, a written rule says **which system wins**.
- [ ] 24 **One named person** owns the CRM: fields, permissions and changes.
- [ ] 25 Before any AI tool reads the CRM, you can state **which numbers can be trusted today** and which cannot.

Your findings, ranked by what they cost.

An audit ends with a short list, not a long one. Write each unticked check here, put a cost beside it in your own terms (deals, hours or forecast error), and give it an owner. A finding without an owner is an observation.

#	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. **Parts 1 and 2.** Data and stages come first, because routing, reporting and the forecast all read them.
2. **Part 3.** Leads next. This is where revenue leaks fastest, and the fixes are usually small.
3. **Part 4.** Reporting and forecast, once the records under them can be trusted.
4. **Part 5.** Automation and ownership, and always before AI goes on top.

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

GO FURTHER, FREE

Related reading and tools

What a RevOps audit is, and what it should cover

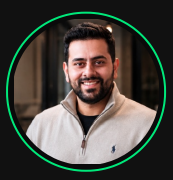
How to audit a HubSpot portal

The week-one CRM data audit

GTM leak detector: six questions, about a minute.

Want a second pair of eyes on your findings? Write to hello@zrev.ai.

WRITTEN BY



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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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