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HUBSPOT AUDIT CHECKLIST

What to check in your HubSpot portal, in what order, and what you should have when you finish.

WHO IT'S FOR

HubSpot admins and RevOps leads, plus the CRO or CMO who owns the portal

WHAT YOU NEED

Super Admin access (or a partner seat), and a short talk with your sales and marketing users about what slows them down in HubSpot

FULL GUIDE

revblack.com/guides/hubspot-audit-checklist

How to use this checklist

Work through the 14 steps in order. Each one starts with what you'll have when it's done, so you know what you're working toward. Tick each box as you go and write the counts straight onto the page.

Treat the whole audit as read only. Record what you find, and change nothing until you've walked the team that uses HubSpot through the findings.

1 **Before you open HubSpot**
Steps 1 to 3. Set the objective, map how the team should work, get the right access.

2 **HubSpot system checks**
Steps 4 to 11. Subscriptions, data quality, duplicates, deals, unused tools, integrations, workflows and marketing.

3 **Reviewing the findings**
Steps 12 to 14. Test each pain point, work out the cause with the team, write it up.

Some checks depend on your HubSpot tier. The full guide notes which hubs and tiers each tool needs, with links to HubSpot's own documentation.

PART 1 · STEPS 1 TO 3

BEFORE YOU OPEN HUBSPOT

Start with the business, not the portal. Know what the team is supposed to do in HubSpot before you judge what's in it.

1 Decide what the audit is for

When this step is done, you'll have a short written goal for the audit, plus a list of pain points with the name of the person who raised each one.

- [ ] Write down the question the audit needs to answer.
- [ ] Talk to the main users (sales reps, account managers, marketing). Ask what slows them down and what they've stopped using.
- [ ] Write the notes from those conversations yourself rather than relying on AI notes, so you understand each pain point before you test it.
- [ ] Log each pain point with who raised it. You'll test every one in step 12.
- [ ] Turn each complaint into something you can check in HubSpot.

THE AUDIT QUESTION

PAIN POINTS

Pain point	Raised by	What you'll check

2 Map the processes HubSpot should mirror

When this step is done, you'll have a written map of how the team is supposed to work: each pipeline's stages with their entry and exit criteria, which rules HubSpot actually enforces, and what your team means by a lead and a contact.

- [ ] List the stages in each pipeline and the entry and exit criteria the team agreed on.
- [ ] Note which rules HubSpot enforces (required fields, stage rules) and which exist only on paper.
- [ ] Note how marketing uses HubSpot day to day, so you know which tools to expect in use.
- [ ] Agree on what a lead is and what a contact is, especially if HubSpot syncs with Salesforce.

3 Confirm your access

When this step is done, you'll have Super Admin access (or a partner seat) for as long as the audit runs, confirmed by opening every hub, settings page and record type.

- [ ] You have Super Admin access, or a partner seat if a HubSpot partner runs the audit.
- [ ] You can open every hub and settings page, and all records.
- [ ] The audit is read only. No changes until the team has seen the findings and why each change is needed.

PART 2 · STEPS 4 TO 11

HUBSPOT SYSTEM CHECKS

Most checks mean opening an object, adding filters and writing down the count. Click through the portal the way a rep or a marketer does every day, and write every number down as you go.

4 Subscriptions, users and permissions

When this step is done, you'll have a list of every hub you pay for and its tier, with your seat counts, how many Super Admins you have, which inactive users still hold paid seats, and whether users have 2FA turned on.

HUBS AND TIERS

Hub	Tier	Used by the team?

- [ ] Marketing contact tier _____
- [ ] Marketing contacts _____
- [ ] Assigned seats _____
- [ ] Total seats _____
- [ ] Super Admins _____
- [ ] Inactive users with paid seats _____
- [ ] Note each subscription's term and next billing date.
- [ ] Compare the team's complaints with the tier. Some 'HubSpot can't do it' complaints are higher-tier features.
- [ ] Check who can edit property settings and customize record page layouts.
- [ ] Check 2FA status in Settings > Security, on the Permissions tab.
- [ ] Review teams and seat types, and check that seats match people's roles.

5 Contacts and companies

When this step is done, you'll have a list of the counts from each contact and company check in this step, plus the property issues HubSpot's data quality tools flag.

- [ ] Total contacts _____
- [ ] Missing email or name _____
- [ ] No associated company _____
- [ ] Inactive or missing owner _____
- [ ] Total companies _____
- [ ] Companies with no contacts _____
- [ ] Companies with no deals _____
- [ ] Missing industry, website or owner _____
- [ ] Open Data Management > Data Quality and note the duplicate, empty and unused properties it lists.

6 Duplicates

When this step is done, you'll have the number of duplicate pairs for contacts and for companies, a few example pairs saved as evidence, and a note on whether HubSpot creates companies automatically.

- [ ] Contact duplicate pairs _____
- [ ] Company duplicate pairs _____
- [ ] Record a few example pairs as evidence. Hold off on merging until the findings are reviewed.
- [ ] If you sync with Salesforce: is HubSpot set to create and associate companies automatically?
  Settings > Data Management > Objects > Companies, Automation section. On / Off

7 Deals and pipeline health

When this step is done, you'll have a list of the counts from each deal check in this step, plus the pipeline stages that don't match the criteria you mapped in step 2.

- [ ] Compare each pipeline's stages with the criteria from step 2. Note stages that don't match how the team sells.
- [ ] Deals per pipeline _____
- [ ] No amount _____
- [ ] Amount of $0 _____
- [ ] No deal type _____
- [ ] No close date _____
- [ ] Open deals _____
- [ ] Closed deals _____
- [ ] No associated contacts _____
- [ ] Open, no activity in 60+ days _____
- [ ] Open, close date passed _____
- [ ] Moved out of closed won or lost _____

Last activity date only counts activity logged on the deal. A deal can look stale when calls and emails are logged on the contact instead.

8 Objects and tools nobody uses

When this step is done, you'll have a list of the tools and objects that are switched on but nobody uses, plus a short note on each custom object saying what it's for and whether it's documented.

- [ ] Leads, Campaigns and Tasks: note which are unused and flag them for discussion. Leave them switched on for now.
- [ ] Campaigns: look for campaigns marked active that the team has stopped using, and any with data issues.
- [ ] Meetings scheduler, goals, target accounts, inboxes and calling: note which are set up and which are used.

CUSTOM OBJECTS (ENTERPRISE ONLY)

Custom object	What it's for	Documented?	Could a standard object do it?

9 Integrations and the Salesforce sync

When this step is done, you'll have a list of every connected app and the records it creates or changes. If you sync with Salesforce, add the sync error counts, your API use and a summary of the sync rules.

CONNECTED APPS (SETTINGS > INTEGRATIONS > CONNECTED APPS)

App	Records it creates or updates	Active, unknown or unused?

IF YOU SYNC WITH SALESFORCE

- [ ] Sync errors (by type) _____
- [ ] API calls used vs allocation _____
- [ ] Note which Salesforce user the integration connects through, and confirm it still has the access the sync needs.

- [ ] Review the sync rules for contacts, companies, deals and activities, including any inclusion list.
- [ ] Check whether new HubSpot contacts arrive in Salesforce as leads or as contacts, and that it matches step 2.
- [ ] List what isn't syncing (tickets, for example) and decide whether it should.
- [ ] If nobody has reviewed the sync settings in a year, look for newer connector options.

10 Workflows

> **When this step is done, you'll have** a count of active, inactive and deleted workflows, plus a list of the workflows the team needs to review or explain.

- [ ] Need review (Health tab) _____
- [ ] Unused (no enrollments in 90 days) _____
- [ ] Active _____
- [ ] Inactive _____
- [ ] Deleted _____
- [ ] Flag workflows that conflict with each other.
- [ ] Flag active workflows the team can't explain.
- [ ] Note temporary workflows (a one-off campaign or cleanup) that should have been turned off.
- [ ] If you sync with Salesforce, check workflows that change lifecycle stage, owner or synced fields against the sync rules.

11 Marketing assets

> **When this step is done, you'll have** your email health numbers for the last 30 days, plus a list of marketing assets that are broken or forgotten.

- [ ] Email health score _____
- [ ] Hard bounces _____
- [ ] Unsubscribes _____
- [ ] Spam reports _____
- [ ] Compare email health with an earlier period (Marketing > Email > Health tab).
- [ ] Landing pages, website pages, blog posts, CTAs and forms: what's published, what's in draft, and what's broken.
- [ ] List the social and ad accounts connected to HubSpot, and whether they're still in use.

PART 3 · STEPS 12 TO 14

REVIEWING THE FINDINGS

The system checks tell you what's in HubSpot. This part tells you why, and what to do about it.

12 Check every pain point against the evidence

When this step is done, you'll have a short note for each pain point from step 1 saying what you found, with evidence such as screenshots or example records.

Pain point (from step 1)	What you found	Evidence

13 Work out the cause with the team

When this step is done, you'll have one question for the team about each critical finding, with their answers.

A finding can be a technical problem, or a process or adoption problem. Check before you assume.

Critical finding	Question for the team	Their answer

14 Write up the audit

When this step is done, you'll have the finished audit write-up, ready to walk the team through.

- [ ] A readout of the system: the counts and data from steps 4 to 11.
- [ ] Critical findings: the main red flags, such as a high number of duplicates or custom objects nobody documented.
- [ ] Questions for the team, from step 13.

Check that it worked

The audit is done when you can say yes to each of these:

- [ ] You understand every finding well enough to explain it to the team.
- [ ] Every major object, custom object, hub and setting has been reviewed.
- [ ] Every pain point from step 1 has a finding or an explanation.
- [ ] Every critical finding has a question for the team.
- [ ] No section is left blank or marked 'to be done' without a reason.

Run the audit again quarterly, or whenever you take over the portal or the team stops trusting the data.

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RATHER HAVE SOMEONE ELSE RUN IT?

RevBlack runs HubSpot and Salesforce audits for B2B teams.

Book a HubSpot audit call at revblack.com/contact-us