HUBSPOT CRM AUDIT

An anonymised example client report showing how a HubSpot audit can be presented clearly and practically.

Executive summary

Example Client Ltd has the foundations of a useful HubSpot setup: the team is actively using the CRM, core contact and company records are in place, and the sales pipeline gives a reasonable view of open opportunities. The main opportunity is not to rebuild the system, but to tidy the structure, improve data quality, connect the missing tracking and email pieces, and give the team clearer reporting.

Audit snapshot

Area	Status	Client-facing summary
Plan & access	**OK**	The plan is broadly suitable, but paid seats and permission levels should be reviewed before renewal.
Data quality	**Needs attention**	Duplicates, hard bounces and inconsistent lifecycle stages are making reporting less reliable.
Tracking & attribution	**Needs attention**	Website tracking is incomplete, so source reporting is weaker than it should be.
Email deliverability	**Needs attention**	The sending domain needs a full DNS check, including DKIM and DMARC.
Pipeline & follow-up	**OK**	The pipeline is usable, but follow-up tasks and lead scoring are not yet doing enough work for the team.
AI readiness	**Opportunity**	The CRM could support AI-assisted summaries, lead prioritisation and reporting once data quality, consent and workflow rules are tightened.

What is working well

- The account is already being used as the central place for contacts, companies and sales opportunities.
- The sales pipeline is understandable and gives the team a starting point for managing active enquiries.
- Contacts and companies are generally associated, which means the account has a workable CRM foundation.
- There are useful lists and templates already in place, even though some need tidying or archiving.
- The team has enough HubSpot maturity to improve the setup without needing a full migration or rebuild.

Key findings

1. Plan, users and access

The current HubSpot plan appears broadly appropriate for the client's current use, but there are areas where seat allocation and permission levels should be reviewed. A small number of users have more access than they need, and all users should have two-factor authentication enabled.

- Reduce admin access to only the people who need it.

- Deactivate any inactive users.
- Review paid seats before renewal so the client is not paying for unused access.

2. Data quality and lifecycle stages

The database contains a manageable but important amount of duplicate and bounced data. This affects trust in the CRM, makes reporting less reliable and can create unnecessary marketing contact usage.

- Review duplicate contacts and companies monthly.
- Create an active list for hard bounces and remove them from marketing sends.
- Tighten lifecycle stage rules so leads, prospects and customers are categorised consistently.

3. Tracking, email and deliverability

The HubSpot tracking code and sending domain configuration need attention before the client relies too heavily on campaign reporting. Without complete tracking and verified email records, the team will struggle to see which activity is creating enquiries.

- Install or verify the HubSpot tracking code across key website pages.
- Check SPF, DKIM and DMARC for the sending domain.
- Connect team inboxes where appropriate so conversations are logged against records.

4. Marketing lists, automation and reporting

The account has the beginnings of useful marketing and reporting activity, but it needs a more deliberate structure. Lists should be active where possible, automations should be documented, and management dashboards should answer the questions the team asks most often.

- Archive old static lists that are no longer useful.
- Create a clear newsletter, prospect, client, bounced and unengaged contact structure.
- Build a dashboard for lead source, conversion, open pipeline, overdue tasks and email engagement.

5. AI readiness and possible AI integration

The account has useful foundations for AI-assisted working, but the best results will depend on clean data, clear permissions and well-defined workflows. AI should be introduced carefully, starting with low-risk support for the team rather than fully automated client-facing decisions.

- Data readiness: clean contact records, lifecycle stages, lead sources and company associations before relying on AI summaries, scoring or recommendations.
- Governance: confirm consent, GDPR expectations, user permissions and what data should or should not be used in AI tools.
- Practical use cases: start with AI-assisted call notes, contact summaries, email drafting, lead prioritisation, knowledge-base content and management reporting prompts.
- Integration options: connect HubSpot with approved AI tools or automation platforms only where there is a clear business process, audit trail and human review step.

Prioritised recommendations

Priority	Recommendation	Why it matters	Effort
1	Clean duplicate and bounced records	Improves trust in the CRM, protects email performance and reduces wasted marketing contact usage.	Medium
2	Tighten access, 2FA and admin permissions	Reduces data protection risk and keeps account control with the right people.	Low
3	Verify tracking code and domains	Improves attribution, campaign reporting and email deliverability before more activity is pushed through HubSpot.	Low
4	Clarify lifecycle stages and lead scoring	Helps the team see which enquiries need attention and where prospects are in the journey.	Medium
5	Create a simple reporting dashboard	Gives management visibility of source, conversion, pipeline value, overdue tasks and email engagement.	Medium
6	Document core automations and list rules	Makes the setup easier to maintain and reduces the chance of missed follow-up.	Medium
7	Assess AI readiness before adding AI tools	Keeps AI use practical, compliant and tied to clean CRM data rather than adding automation on top of messy foundations.	Low

Suggested 30 / 60 / 90-day plan

First 30 days - tidy and protect the account

- Review users, seats, permissions, 2FA and inactive accounts.
- Clean the most obvious duplicate records and hard bounces.
- Verify tracking code, connected inboxes and sending domain records.
- Create simple data hygiene lists for bounced and unengaged contacts.

Days 30-60 - improve process and visibility

- Refine lifecycle stages, lead statuses and deal stage definitions.
- Add lead scoring if the available HubSpot tier supports it.
- Create standard views for sales follow-up and overdue tasks.
- Build a first management dashboard covering source, pipeline and activity.

Days 60-90 - automate and hand over

- Document core lists, workflows and ownership rules.
- Create or refine automations for new enquiries, nurture and re-engagement.
- Run team training using the client's real pipeline and record examples.
- Agree a monthly CRM hygiene routine and review rhythm.
- Pilot one AI-assisted use case, such as contact summaries, call-note clean-up or management reporting prompts, with human review in place.

Quick wins Hayley could deliver first

1. Run a user and permissions clean-up.
2. Create bounced, duplicate and unengaged contact lists.
3. Verify the tracking code and sending domain setup.
4. Set up a simple sales follow-up view.
5. Create a lightweight dashboard for management visibility.
6. Document the agreed CRM rules in a short handover guide.
7. Map one or two safe AI use cases that could save time without creating GDPR, accuracy or client communication risk.

Closing note

This example audit shows the type of practical, prioritised output a client can expect. The aim is to make HubSpot easier to trust, easier to use and easier to report from, without overwhelming the team with unnecessary complexity.