

HUBSPOT CRM AUDIT

A clear view of your CRM health.

Acme Europe

Prioritised evidence and practical actions for a cleaner, more reliable revenue system.

HUBSPOT PORTAL ID

12345678

PORTAL DOMAIN

acme-europe.com

GENERATED

28 July 2026 at 09:30 UTC

PREPARED BY

MAN Digital

What the audit found

Contact ownership and overdue deal close dates are the most urgent improvement areas.

CRM HEALTH SCORE

64
out of 100

The useful signal

Missing owner is the first issue to address. Apply reviewed ownership rules and assign accountable teams.

RECORDS INSPECTED

146,251

FINDING CATEGORIES

46

EVIDENCE COVERAGE

100%

Coverage by object

Contact	68,420 records • 100% coverage
Company	12,860 records • 100% coverage
Deal	8,415 records • 100% coverage
Lead	2,940 records • 100% coverage
Quote	1,180 records • 100% coverage
Task	18,760 records • 100% coverage
Meeting	6,340 records • 100% coverage
Call	9,225 records • 100% coverage

Product	2,415 records • 100% coverage
Line item	14,870 records • 100% coverage
Goal	186 records • 100% coverage
Property	1,248 records • 100% coverage
List	342 records • 100% coverage
Campaign	96 records • 100% coverage
Sequence	74 records • 100% coverage
Workflow	128 records • 100% coverage

Health areas

Each score is calculated from deterministic audit evidence. Unassessed areas are omitted rather than guessed.

Contact data quality 58 / 100



Evidence coverage 100% · Weight 22%

Revenue and pipeline 61 / 100



Evidence coverage 100% · Weight 24%

Engagement discipline 66 / 100



Evidence coverage 100% · Weight 20%

Database hygiene 63 / 100



Evidence coverage 100% · Weight 18%

Configuration and assets 76 / 100



Evidence coverage 100% · Weight 16%

The findings to act on first

Start with the highest-impact issues, then use the workbook to review every affected record.

01 • CNT-003

HIGH

Missing owner

Contact • 3,421 affected records

Apply reviewed ownership rules and assign accountable teams.

02 • CNT-011

HIGH

Bounced or undeliverable

Contact • 1,284 affected records

Suppress or correct invalid addresses after record-level review.

03 • TSK-001

HIGH

Overdue open task

Task • 963 affected records

Re-prioritise, complete or close outdated tasks with owners.

04 • CMP-004

HIGH

Missing owner

Company • 643 affected records

Review company ownership in HubSpot.

05 • DEAL-010

HIGH

Missing contact association

Deal • 529 affected records

Review and associate the relevant buying contact in HubSpot.

Open the implementation workbook

Review every finding, affected record and HubSpot review link in the representative working file.

[Download working file](#)

Turn findings into a working backlog

A practical sequence for remediation without losing the audit context.

STEP 01

Missing owner

Apply reviewed ownership rules and assign accountable teams.

STEP 02

Bounced or undeliverable

Suppress or correct invalid addresses after record-level review.

STEP 03

Overdue open task

Re-prioritise, complete or close outdated tasks with owners.

STEP 04

Missing owner

Review company ownership in HubSpot.

STEP 05

Missing contact association

Review and associate the relevant buying contact in HubSpot.

FINAL CHECK

Re-run and compare

Validate the highest-impact fixes and compare category scores against this dated snapshot.

What was assessed—and what was not

The report separates assessed evidence from audit areas HubSpot did not make available to this connection.

Method and limitations

This report covers every non-archived record accessible under the permissions granted to the app. Unsupported or unavailable modules are not treated as healthy.

Scores and priorities come from deterministic audit rules and assessed evidence only. The report uses no AI or LLM and makes no changes to HubSpot.

Evidence boundary

Every enabled module is assessed only from evidence returned by HubSpot. A successful full traversal shows 100% coverage; missing totals or unavailable modules are never guessed.

Scoring and priorities

The score, category results and ranked priorities come from versioned deterministic rules. Unassessed evidence is omitted rather than counted as healthy.

Read-only operation

The audit reads allowlisted endpoints only. It cannot create, update, merge, archive, import or delete HubSpot records.

File delivery

The PDF is rendered in memory. The detailed working file is generated only when its protected link is opened; neither generated file is archived by the app.

FROM AUDIT TO IMPLEMENTATION

Build a HubSpot system your teams can trust.

MAN Digital helps revenue teams turn CRM evidence into cleaner data, stronger processes and a HubSpot setup that supports growth.

CRM implementation

Architecture, migration and adoption designed around the way your teams work.

HubSpot customisation

Objects, automation and reporting shaped to your commercial model.

Revenue operations

Connected processes and governance across marketing, sales and customer success.

Integrations

Reliable flows between HubSpot and the tools that power your revenue engine.

[Book a working session with MAN Digital](#)