HubSpot

Data cleaning checklist

How to Use: Log into your HubSpot account and collect the information outlined below. Then, using your collected information, create an action plan to optimize your HubSpot account.

Department Stakeholders

List primary departments, and contacts that use HubSpot. What are their departmental goals for HubSpot?

Department	Goal		Department	Goal
Department	Goal		Department	Goal
Department	Goal		Department	Goal

Contact Records

_____ Total number of contacts in database

_____ Total number of unassigned contacts

_____ Total number of contact lists

_____ Total number of unused contact lists

Company Records

_____ Total number of companies in database

_____ Total number of unassigned companies

_____ Total number of company based contact lists

_____ Total number of unused company based contact lists

Deal Records

_____ Total number of deals in database

_____ Total number of customized pipelines

_____ Number of custom saved views

Tickets

_____ Total number of tickets in database

_____ Total number of custom ticket pipelines

_____ Number of custom ticket views

Contact Properties

Total number of:

_____ Single-line text

_____ Multi-line text

_____ Single checkbox

_____ Radio select

_____ Dropdown select

_____ Multiple checkboxes

_____ Date Picker

_____ Number

_____ Calculation

_____ Score

_____ HubSpot User

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Forms

_____ Total number of active regular forms

_____ Total number of active pop-up forms

Number of forms with submissions in:

_____ 6 months   _____ 12 months

_____ Number of forms created last 60 days

Chatflows

_____ Total number of active chatflows

_____ Number of chatflows with engagement

_____ Number of bots created

_____ Number of live chats created

Lifecycle Stage

How many contacts in each stage:

_____ Subscriber

_____ Lead

_____ Marketing Qualified Lead

_____ Sales Qualified Lead

_____ Customer

_____ Evangelist

_____ Other

Lead Qualification

Leadscoring in use?

☐ Yes   ☐ NO

Lead Status

_____ Total number of contacts with lead value

Workflows

_____ Total number of workflow folders

_____ Total number of active workflows

_____ Total number of workflows for data management

Naming Convention

Is there a naming convention in place?

☐ Yes   ☐ NO

Reporting

☐ Review Executive Leadership Dashboard

☐ Review Management level Dashboard

☐ Review Individual Contributor Dashboard

☐ Do you have everything you need for OKRs, KPIs and goals vs actuals?

Rate your current HubSpot account status.

☆☆☆☆☆

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My Action Plan

List the business goals

Map your current customer journey in HubSpot

Map your ideal customer journey in HubSpot

Is there any data friction preventing your ideal customer journey?

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