

HACKING DEMAND · FREE CHECKLIST

RevOps Cleanup Checklist

The 20-point HubSpot data-hygiene checklist we run before we trust a single report.

Most B2B pipelines leak revenue not because of bad marketing, but because the data underneath is dirty: duplicate contacts, lifecycle stages that lie, and attribution nobody trusts. This is the exact checklist we run when we clean up a HubSpot portal. Work top to bottom. Each box is a decision, not a chore.

1. Data hygiene (do these first)

- De-duplicate contacts and companies (HubSpot duplicate management tool + a manual pass on the top 200 records).
- Standardize country, state, and industry with dropdown properties, not free text.
- Fix email validity: remove hard bounces, quarantine role-based addresses (info@, sales@).
- Normalize job titles into a "seniority" and "function" property you can actually segment on.
- Merge or archive contacts with no email and no activity in 24+ months.

2. Lifecycle stages that don't lie

- Write a one-sentence, testable definition for every lifecycle stage (what MUST be true to enter it).
- Ensure stages only move forward automatically; block backward jumps except by explicit workflow.
- Set lifecycle stage on create for every source (forms, imports, integrations, sales-created).
- Audit: how many "MQLs" have never actually met the MQL criteria? Fix the workflow, not the records.
- Add a "became a customer" date stamp and verify it matches closed-won deals.

3. Attribution you can defend

- Confirm every form, CTA, and paid link carries consistent UTMs (document the convention).
- Turn on original + latest source, and spot-check 20 records against reality.
- Reconcile "contacts created" by source against ad platform + CRM numbers monthly.
- Kill vanity: report on pipeline and revenue by source, not raw lead counts.

4. Workflows & handoffs

- Map marketing-to-sales handoff: what triggers it, who owns the record, what the SLA is.
- Remove zombie workflows (enrolled 0 contacts in 90 days) and document what's left.
- Add a re-engagement path for contacts that go cold instead of letting them rot.

Scoring: Count your unchecked boxes. 0-3 = healthy. 4-8 = a focused cleanup sprint pays for itself fast. 9+ = your reporting is currently fiction; start at Section 1.

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