

Rapid HubSpot Data Quality Audit

An independent, read-only diagnostic of your HubSpot Contacts, Companies, and Deals against a fixed checklist. You get a scored PDF report and a video walkthrough within three business days of access. We never change your portal.

- \$990 prepaid
- 3 business days after access
- PDF + video
- Read-only

DELIVERABLES

- ❑ **Scored PDF report.** Every check scored per object, ranked by impact, with record counts and the filter logic so your team can reproduce each number in HubSpot.
- ❑ **Video walkthrough.** A recorded pass through the findings in priority order: what to fix first, what to leave alone.
- ❑ **Fixed checklist.** Same checks every time. No discovery calls that turn into proposals.

PRICE AND TERMS

\$990

- ❑ Flat, prepaid. One portal, all three objects, full checklist.
- ❑ Invoice and ACH available for pilots.
- ❑ Clock starts when read-only access lands. Delivery within 3 business days.
- ❑ Access can be revoked the day the report is delivered.

THE CHECKLIST, BY OBJECT

CONTACTS	COMPANIES	DEALS	CROSS-OBJECT
❑ Duplicates by normalized email; by name + company ❑ Fill rates: email, name, lifecycle stage, lead status, owner ❑ Invalid, role-based, hard-bounced emails ❑ No company association ❑ Source and attribution consistency ❑ Stale records, no activity	❑ Duplicates by domain; by normalized name ❑ Domain blank, malformed, or free-mail ❑ Fill rates: industry, employees, revenue, owner ❑ No associated contacts or deals ❑ Parent / child hierarchy consistency	❑ Open deals with close dates in the past ❑ Amount and close date blank in open pipeline ❑ Stuck in stage beyond pipeline norms ❑ Missing contact or company association ❑ Closed-lost reason, closed-won consistency ❑ Pipeline and stage usage across teams	❑ Association integrity across all three ❑ Owner alignment contact / company / deal ❑ Lifecycle vs. lead status vs. deal stage conflicts ❑ Property sprawl: custom properties with near-zero fill ❑ Required-property enforcement vs. actual fill

ACCESS WE NEED

- ❑ A view-only user seat, **or** a private-app token with read-only CRM scopes for contacts, companies, deals, and schemas.
- ❑ Nothing else. No write scopes, no workflow access, no integrations.

OUT OF SCOPE

- ❑ Hands-on cleanup, merges, or workflow changes. Diagnosis only.
- ❑ HubSpot Solutions Partner services. We are independent and not a partner.
- ❑ Starter or free portals. The checklist assumes Professional or Enterprise.
- ❑ Custom scope. The checklist is fixed by design.

HOW IT WORKS

01

Request the audit

Portal tier and rough record counts. We confirm fit and send a prepaid invoice.

02

Grant read-only access

Seat or token. The three-day clock starts here.

03

Get the report

PDF and video arrive together. Then it's yours.