HUBSPOT PORTAL SCORE

Sample portal

8 October 2026

Action needed

The data your team relies on is not reliable yet. Start with the critical findings: each one comes with the fix.

3 critical **8** warnings **2** passed

Data quality	67	Ownership and routing	25
Pipeline and forecast	33	Access and governance	50
Data model	50	Attribution	50

HOW TO READ THIS

The score is weighted across 13 read only checks run live against your portal on 8 October 2026. A critical finding scores nothing, a warning half, a pass in full. Ownership and access carry the most weight because they cost the most when they go wrong. Anything we could not check is left out of the score rather than counted as a pass.

We counted records and read property settings. We did not copy, store or change any record, and our access to your portal ended when the run finished.

What to fix, worst first

11 findings from this run. Each one says why it matters and how to fix it inside HubSpot.

CRITICAL

OWNERSHIP AND ROUTING

Contacts with no owner

1,380 contacts have no owner: 33% of 4,210.

A contact with no owner is a lead nobody is accountable for. It does not get followed up and it does not show up in anyone's reports.

The fix. Build an active list of contacts where Contact owner is unknown and bulk assign them. Then add an owner rotation to the workflow that runs when a form is submitted, so new leads never land unowned.

CRITICAL

PIPELINE AND FORECAST

Open deals past their close date

47 open deals are past the close date: 26% of open deals.

A close date in the past on an open deal means the forecast is counting money that has already not arrived.

The fix. Have each owner either move the close date or close the deal lost. Then add a workflow that creates a task for the owner the day a close date passes on an open deal.

CRITICAL

PIPELINE AND FORECAST

Open deals with no activity in 90 days

61 open deals have had no logged activity in 90 days: 33% of open deals.

Deals nobody has touched in a quarter are usually dead. Left open, they inflate the pipeline and hide the deals that need attention.

The fix. Review the list with each rep and close lost with a reason. Add a Stalled reason to your closed lost options and a workflow that alerts the manager when an open deal goes 60 days without activity.

SAMPLE REPORT | FICTIONAL DATA

WARNING

DATA QUALITY

Contacts with no lifecycle stage

612 contacts have no lifecycle stage: 15% of contacts.

Lifecycle stage is how HubSpot knows a lead from a customer. Without it, funnel reporting and lead handover do not work.

The fix. Agree the stage definitions with sales and marketing, backfill the blanks with a single workflow, and set a default stage on every form and import.

WARNING

DATA QUALITY

Contacts not linked to a company

1,500 contacts are not linked to a company: 36% of contacts.

In B2B, a contact with no company is invisible to account reporting, deal association and account based marketing.

The fix. Switch on automatic company creation and association from email domain in Settings, Objects, Companies. Then review the free email domains (Gmail and the like) separately.

WARNING

OWNERSHIP AND ROUTING

Open deals with no owner

3 open deals have no owner: 2% of 184 open deals.

Unowned deals fall out of every rep's pipeline view and out of the forecast.

The fix. Filter the deals board by Deal owner is unknown, assign each one, and make Deal owner required on deal creation in the pipeline settings.

SAMPLE REPORT | FICTIONAL DATA

WARNING

ACCESS AND GOVERNANCE

Super admin access

6 of 14 users are super admins.

Super admins can export every record, delete data and change billing. The fewer people who hold it, the smaller the blast radius of one mistake or one compromised login.

The fix. Keep super admin to two named people. Move everyone else to a permission set that matches their job, and switch off export rights for anyone who does not need them.

WARNING

DATA MODEL

Custom contact properties

180 custom contact properties.

Every extra property is another field on the record, another option in every filter, and another thing to keep in step with your forms and integrations.

The fix. In Settings, Properties, filter to Custom and sort by usage. Archive anything with no values and nothing depending on it, and merge the near duplicates.

WARNING

DATA MODEL

Custom properties with no description

121 custom properties have no description: 67% of 181 custom properties checked.

An undocumented property is one only its creator understands. When they leave, nobody knows what it means or whether it is safe to change.

The fix. Give every custom property a short description saying what it is for and what writes to it. Start with the ones used in workflows and reports.

SAMPLE REPORT | FICTIONAL DATA

WARNING

DATA MODEL

Properties with duplicate labels

4 properties share a label with another property on the same object.

Two properties with the same label on the same object means forms, reports and integrations quietly write to different fields.

The fix. Pick the property each workflow, form and integration should use, migrate the values across, and archive the other one.

WARNING

ATTRIBUTION

Contacts with an offline source

2,990 contacts are attributed to offline sources: 71% of contacts.

Offline source covers imports, integrations and records created by hand. A high share means you cannot tell which channels produce your leads.

The fix. Make sure every website form is a HubSpot form or uses the HubSpot tracking code, and pass UTM parameters on every campaign link. Imports will always be offline; integrations should set the original source drill down.

What passed

- Contacts with no email address. Every contact has an email address.
- Open deals with no amount. Every open deal carries an amount.

SAMPLE REPORT | FICTIONAL DATA

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WHAT THIS SCORE CANNOT SEE

Thirteen checks is the surface. The HubSpot Audit goes underneath.

The free score reads counts and settings. Most of what quietly costs a HubSpot team time sits where a quick score cannot look:

- Workflows that error, loop or that nobody owns
- Paid seats nobody logs into
- Duplicate contacts and companies
- Integration sync errors and field mapping
- Dashboards and reports that disagree with each other
- Lead scoring, routing rules and SLA handover

The HubSpot Audit

58 portal checks, root cause analysis and sector benchmarking. You get downloadable findings and a guide to fixing issues yourself, within five working days. Pay once, then decide whether you want us to do the work.

See the HubSpot Audit | **Book a call with a specialist**