

HubSpot CRM Cleanup Checklist

CRM Health & Data Hygiene Guide

A structured HubSpot CRM cleanup ensures your lifecycle automation, reporting, and revenue processes are built on accurate data.

Use this checklist to audit your HubSpot instance and identify gaps impacting performance.

1. Database Structure & Deduplication

- Run HubSpot duplicate contact scan
- Merge duplicate contacts using email as primary identifier
- Review duplicate companies and merge where appropriate
- Validate unique identifiers across integrations
- Audit import processes that may create duplicates
- Establish ongoing duplicate monitoring process

Goal: Maintain a single source of truth for each record.

2. Contact & Company Property Cleanup

- Export full property inventory
- Identify unused properties
- Archive redundant or legacy fields
- Standardize naming conventions
- Confirm correct property field types (dropdown vs text vs number)
- Document required properties for lifecycle progression
- Review properties referenced in workflows and reports

Goal: Reduce property sprawl and improve usability.

3. Lifecycle Stage & Funnel Alignment

- Document lifecycle stage definitions
- Identify contacts stuck in early stages
- Validate lifecycle automation triggers
- Ensure lifecycle stages cannot move backwards incorrectly
- Audit MQL → SQL → Opportunity handoff logic

- Confirm ownership assignment rules
- Rebuild lifecycle dashboards after cleanup

Goal: Ensure funnel reporting reflects reality.

4. Automation & Workflow Cleanup

- Inventory all active workflows
- Identify duplicate or overlapping workflows
- Archive outdated campaign workflows
- Validate enrollment triggers
- Review workflow conflicts and loops
- Document workflow ownership
- Confirm suppression logic exists

Goal: Prevent automation from corrupting data.

5. Lead Source & Attribution Validation

- Audit Original Source consistency
- Audit Latest Source consistency
- Validate UTM tagging governance
- Standardize campaign naming conventions
- Confirm attribution properties populate correctly
- Rebuild attribution reporting after cleanup

Goal: Restore confidence in marketing ROI reporting.

6. Lists & Segmentation Rebuild

- Identify legacy lists used in automation
- Rebuild ICP lists using standardized properties
- Validate suppression lists
- Remove lists no longer referenced
- Confirm list logic aligns with lifecycle definitions

Goal: Ensure segmentation supports scalable campaigns.

7. Reporting & Dashboard Validation

- Audit core executive dashboards

- Validate lifecycle conversion metrics
- Confirm attribution accuracy
- Identify manual reporting workarounds
- Rebuild dashboards using standardized data
- Document reporting definitions

Goal: Enable leadership to trust CRM reporting.

8. Data Governance & Documentation

- Define property governance rules
- Define lifecycle ownership rules
- Establish workflow naming standards
- Document CRM architecture
- Create cleanup cadence (quarterly recommended)
- Assign internal CRM owner

Goal: Prevent cleanup from becoming recurring emergency work.

Signs Immediate Cleanup Is Needed

- Reporting inconsistencies
- Sales distrusts CRM data
- Lifecycle stages don't match pipeline reality
- Duplicate contacts increasing
- Automation difficult to understand
- Lists produce inconsistent counts

Recommended Cleanup Cadence

- Quarterly for scaling teams
- After new integrations
- After major campaigns
- Before leadership reporting cycles
- Before hiring additional marketers

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AKtivate Strategies supports organizations with lifecycle architecture, automation stabilization, and reporting alignment so growth can scale without operational friction.

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