

HubSpot audit: every hub tested against the job it was bought to do

For a business that bought HubSpot and has not yet had the value from it. A portal can pass every configuration check and still fail its job, so each hub is measured against the revenue goals it exists to serve, and every finding arrives with its measurement, its method and its evidence.

Three ways in, by how much context exists

Charter-led

A signed RevOps charter states the goals, definitions, owners and handoffs. Every test is scored against it.

Goal-led

No charter yet: a 60-minute intake produces a provisional charter, the audit's first deliverable.

Technical baseline

Hygiene tests that hold whatever the goals: errors, duplicates, sprawl, permissions.

What is tested

Smart CRM and data

Property sprawl, duplicates, missing associations, owners

Integrations

Sync error rate, two writers on one field, stale syncs

Workflows

Error rate, dormant and orphaned workflows, conflicts

Marketing Hub

Billable contacts never emailed, lifecycle mapping

Sales Hub

Stage criteria, ageing, pushed close dates, idle seats

Service Hub

SLA clocks, tickets without a company, CSAT coverage

Revenue Hub

Quotes against line items, invoice ageing, the ledger

Content Hub

Orphan pages, redirect chains, unused templates

Reporting

Records each report excludes, conflicting definitions

Permissions

Super admins, departed owners, app scopes

Deliverables

- **Findings register.** Every test with its measurement, threshold, result, evidence, the goal it affects and the recommendation it produces.
- **Hub scorecard.** Pass, warn and fail by hub and test area, on one page.
- **Remediation sequence.** Recommendations ordered by benefit against effort, with dependencies, actionable by any competent practitioner.
- **Continuous re-testing** with RevAudit, so a fixed finding stays fixed.

Sample hub scorecard

	Data	Automation	Reporting	Adoption
Smart CRM	Warn	Pass	Fail	Warn
Marketing Hub	Fail	Warn	Pass	Pass
Sales Hub	Warn	Pass	Fail	Fail
Service Hub	Pass	Warn	Warn	Pass

Sample data, describing no client.

Timeline: one to two weeks



Multi-hub portals with several integrations take longer; the scope is fixed before work starts.

What the audit needs

- Read-only access to the portal; nothing is changed during the audit.
- Integration sync logs and workflow error history.
- The RevOps charter, or 60 minutes to set the goals.
- Short interviews with each role that uses HubSpot.
- Optional: a finance export, to reconcile revenue against the books.

Scope an audit

revopshq.com/services/revops-audit

RevAudit and RevOps Charter are products of Paul Maxwell, the founder of RevOps HQ. RevOps HQ is a HubSpot Solutions Partner. The audit is read-only and fixed in scope.