HUBSPOT DUE DILIGENCE CHECKLIST
for Private Equity Firms

CRM FOUNDATION & DATA QUALITY

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- [ ] DUPLICATE CONTACTS, COMPANIES, AND DEALS AUDITED
- [ ] REQUIRED PROPERTIES ENFORCED AT KEY LIFECYCLE STAGES
- [ ] CLEAR DEFINITIONS FOR CORE PROPERTIES (LEAD SOURCE, OWNER, REGION, SEGMENT)
- [ ] MINIMAL FREE-TEXT FIELDS USED FOR REPORTING
- [ ] HISTORICAL DATA USABLE FOR TREND ANALYSIS

LIFECYCLE STAGES & FUNNEL INTEGRITY

- [ ] LIFECYCLE STAGES CLEARLY DEFINED AND DOCUMENTED
- [ ] NO SKIPPED OR CIRCULAR STAGE MOVEMENT
- [ ] SALES ACTIVITY REQUIRED TO ADVANCE STAGES
- [ ] MARKETING AND SALES AGREE ON STAGE DEFINITIONS
- [ ] FUNNEL CONVERSION RATES ALIGN WITH HISTORICAL PERFORMANCE

PIPELINE HYGIENE & FORECAST ACCURACY

- [ ] DEALS HAVE CLOSE DATES, AMOUNTS, AND OWNERS
- [ ] NO STALE DEALS WITH PROLONGED INACTIVITY
- [ ] WIN RATES REALISTIC BASED ON HISTORICAL OUTCOMES
- [ ] PIPELINE STAGES REFLECT BUYER INTENT, NOT INTERNAL PROCESS
- [ ] FORECAST MATCHES FINANCE AND BOARD REPORTING

AUTOMATION LOGIC & WORKFLOW RISK

- [ ] ACTIVE WORKFLOWS MAPPED AND DOCUMENTED
- [ ] NO CONFLICTING OR OVERLAPPING AUTOMATION
- [ ] LEGACY WORKFLOWS REMOVED OR ARCHIVED
- [ ] AUTOMATION SUPPORTS GTM MOTION, NOT WORKAROUNDS
- [ ] CLEAR OWNERSHIP OF WORKFLOW MANAGEMENT

ATTRIBUTION ACCURACY & REVENUE REPORTING

- [ ] ATTRIBUTION MODEL CLEARLY DEFINED AND CONSISTENT
- [ ] OFFLINE AND MANUAL SOURCES ACCOUNTED FOR
- [ ] REVENUE REPORTS MATCH FINANCIAL SYSTEMS
- [ ] CAC AND CHANNEL PERFORMANCE DEFENSIBLE
- [ ] ATTRIBUTION TRUSTED FOR BOARD-LEVEL DECISIONS

CRM ARCHITECTURE & SCALABILITY

- [ ] PROPERTY NAMING CONVENTIONS STANDARDIZED
- [ ] PERMISSIONS AND USER ROLES CLEARLY DEFINED
- [ ] INTEGRATIONS STABLE AND MONITORED
- [ ] CRM STRUCTURE SUPPORTS FUTURE GROWTH
- [ ] DOCUMENTATION EXISTS FOR KEY CONFIGURATIONS

FINAL ASSESSMENT

- [ ] HUBSPOT IS A RELIABLE SYSTEM OF RECORD
- [ ] CRM RISKS IDENTIFIED AND DOCUMENTED
- [ ] POST-CLOSE REMEDIATION PLAN DEFINED

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