CASE STUDY · VERIFIED INTERNAL PORTFOLIO AUDIT

HubSpot CRM Data Quality & Revenue Operations Audit

A controlled, read-only audit of CRM ownership, follow-up coverage, lifecycle consistency, and activity logging across a full contact population, with a reversible, approval-gated remediation plan.

HubSpot · RevOps · CRM Audit · MCP · Data Quality · AI-Assisted QA

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1 · Executive summary

This is a verified internal portfolio audit of the JITAI Systems HubSpot portal. Its purpose was to measure CRM governance health before adding automation. The audit was read-only by default and covered the entire contact population of 37 records, with no sampling.

The data showed a clear governance gap rather than a tooling gap. Lifecycle staging was complete (37 of 37), but ownership and follow-up were not: 35 of 37 contacts (94.6%) had no owner, 31 of 37 (83.8%) had no next activity, and 33 of 37 (89.2%) had no recorded last-contacted value. A reversible remediation plan was designed and left approval-gated. No CRM records were created, updated, or deleted.

> **Scope of claims.** No client outcome, revenue change, or dollar impact is claimed. Figures are coverage counts from a single portal on the audit date. Public visuals accompanying this study use synthetic demonstration data.

2 · Business problem

CRM records existed and were staged in the lifecycle, but the operational layer that turns records into revenue motion was incomplete. Without an assigned owner, there is no accountable person for a contact. Without a next activity, there is no defined next step. Without logged outreach, there is no reliable history to inform sequencing or reporting.

Adding automation on top of that foundation would scale the gaps rather than close them. The audit was framed to answer a single question: is the CRM ready for automation, or does ownership and process design need to come first?

3 · Audit scope

- **In scope:** read-only inspection of the full contact population across seven operational fields, CRM object inventory, and property-definition review.
- **Fields audited:** lifecycle stage, lead status, contact owner, original source, last activity, last contacted, next activity.
- **Out of scope:** any create, update, merge, association, or delete on production records; changes to pipelines, workflows, properties, or reports.
- **Population:** all 37 contacts. No sampling. Read page limit set above the population size.

> Identity and permissions were verified through read-only MCP and CLI calls before any audit read. Contact and task read access were confirmed as available.

4 · Technical approach

The audit combined the connected HubSpot MCP service and the official HubSpot Agent CLI, each used only for identity, schema, list, search, and dry-run operations.

Method

- Verified OAuth identity and portal through read-only calls on both interfaces.
- Enumerated 92 portal-recognized CRM object types.
- Validated the exact property definitions for lifecycle, lead status, ownership, source, and activity.
- Counted missing values with MCP `NOT_HAS_PROPERTY` filters.
- Independently listed the full population through the CLI and reduced it locally to non-identifying aggregates.
- Ran a non-executing contact-creation dry-run and saved its output.

> Counts were reconciled two ways — MCP count filters and a full CLI list reduced locally — and matched.

5 · Verified aggregate findings

Business field	Present	Missing	Coverage
Lifecycle stage	**37**	**0**	**100.0%**
Original source (all OFFLINE)	**37**	**0**	**100.0%**
Lead status (all populated = NEW)	**33**	**4**	**89.2%**
Last activity date	**14**	**23**	**37.8%**
Next activity date	**6**	**31**	**16.2%**
Last contacted	**4**	**33**	**10.8%**
Contact owner	**2**	**35**	**5.4%**

Priority findings

- **Ownership is the largest control gap.** 35 of 37 contacts (94.6%) are unassigned.
- **Next-step coverage is low.** 31 of 37 (83.8%) have no next activity date.
- **Logged outreach is sparse.** 33 of 37 (89.2%) have no last-contacted value; 23 have no last activity.
- **Signal is undifferentiated.** All 33 populated lead statuses are NEW; all 37 sources are OFFLINE.

> Activity fields are HubSpot-calculated. A missing value means no qualifying logged activity for that property, not necessarily that no interaction occurred. The gaps are coverage observations; no causal revenue loss is implied.

6 · Risk controls

Secrets outside project files · Read-only by default · Dry-run before mutation · Aggregate reporting · PII redaction · Approval-gated writes · Reversible change plan · No fabricated results

Credential values were never read or printed. Analysis retained only aggregate counts, not record-level identifiers. Every proposed change was designed to be inspected, dry-run, explicitly approved, applied, and then verified by reading the affected records again.

7 · Proposed remediation

The remediation plan is a three-gate synthetic demonstration that stays reversible and approval-gated. It uses a reserved `.invalid` email and explicit synthetic labels so it can never be mistaken for a real prospect.

Gate	Action	Control

Gate 1	Create one synthetic contact	Preflight search + saved dry-run + approval
Gate 2	Create and associate one follow-up task	Dry-run against approved ID + approval
Gate 3	Update one qualification field (blank → unreviewed)	Read current state + dry-run + approval

For real portal data, the same discipline would drive ownership-routing rules, a next-step standard for active leads and opportunities, and a logging convention — each reviewed before any bulk change.

8 · What was NOT executed

- No contact, task, or any other record was created, updated, merged, associated, or deleted.
- The synthetic remediation gates were designed and dry-run only; none were applied.
- No pipeline, workflow, property, report, or association label was changed.
- No production identifiers were retained; no data was exported off-platform.

> The contact-creation dry-run returned **ok: true, dry_run: true, executed: false**.

9 · Skills demonstrated

HubSpot administration · Revenue Operations · CRM data quality · Sales Operations · Workflow analysis · Process improvement · MCP + CLI tooling · CRM governance · AI-assisted QA · Privacy & redaction discipline

10 · Evidence classification

Evidence	Classification
Aggregate coverage counts (n = 37)	**Verified internal**
92 object-type inventory	**Verified internal**
Read-only, no-write operation	**Verified internal**
Three-gate remediation plan	**Proposed – not executed**
Dashboard, record card, terminal cards in visuals	**Sanitized / synthetic demonstration**

Public-safe statement. This was a verified internal portfolio audit. No CRM records were changed. No client outcome or revenue improvement is claimed. Synthetic data is used in all public visuals. Proposed CRM writes were not executed.