Data Cleanup Map

Why is this important:

Messy data
=
Missed Opportunities

Trash IN, Trash OUT

Inaccurate Reports, failed workflows = frustrated sales team

Bad data = bad decisions.

Clean Data = Better Decisions

Data Cleanup Roadmap

Snapshot

Phase 1: Strategy & Assessment

Step 1.1: Launch Your Command Center

Go to **HubSpot's Data Quality Dashboard**
Review and document the following:

-Formatting Issues
-Duplicates
-Missing Data & Unused Properties
-Workflow Issues

Step 1.2: Define Data Governance Rules

Create a "CRM Hygiene Rules" document outlining:

Key Process Map
Define required data at each lifecycle stage (Lead → MQL → SQL → Deal → Closed Won)

Deduplication Rules
Clarify logic for merging (e.g., match by email, retain most recently updated)

Deletion Rules
Define criteria for deletion (e.g., no engagement, no owner, no lifecycle stage)

Ownership Rules
Identify team members responsible for different data segments (contacts, companies, deals, workflows)

Step 1.3: Audit & Prioritize Problem Areas
Tackle cleanup in this order:
Workflows – Remove unused ones first
Properties – Identify unused, no-data, or redundant fields
Users & Permissions – Deactivate old users and tighten access
Integrations – Ensure external tools aren't polluting the CRM

Phase 2: Action Steps

Step 2.1: Fix Users & Permissions
Deactivate or remove inactive team members
Reassign their ownership before removal
Limit Super Admin access to only essential roles

Step 2.2: Tidy Up Properties

Go to **Property Insights**
Archive:
-Unused properties
-Properties with no data

Before archiving, verify the property is not used in:
-Workflows
-Forms
-Views
-Reports

Use Miro to label each property as "Archivable" or "Critical"

Step 2.3: Clean Formatting Issues

-Use HubSpot's **Fix Formatting Tool**
-Accept or reject changes individually or in bulk (review carefully)
-Set up automation to prevent future formatting errors

Step 2.4: Deduplicate Records

-Use HubSpot's built-in **Manage Duplicates** feature for contacts and companies
-Compare and merge with care—merges are permanent
-Use tools like Dduply or Insycle if you need advanced deduplication logic

Step 2.5: Clean Up Workflows

-Turn off or delete outdated workflows
-Review criteria, timing, and dependencies
-Rename active workflows with clear naming conventions

Step 2.6: Email Preferences & GDPR Compliance

-Simplify email subscription types
-Add GDPR consent checkboxes to all forms
-Update marketing email footers with:
>Unsubscribe link
>Preference center
>Branding and optional CTAs

Step 2.7: Audit Lifecycle Stage Logic

-Define when and how contacts move between stages
-Review and refine automation rules (form fills, scoring, etc.)

Step 2.8: Delete Unnecessary Records

-Create a custom property: **Mark for Deletion**

-Filter records with deletion criteria (e.g., no activity for 12+ months)

-Manually delete records in bulk from the filtered list

Step 2.9: Enrich Missing Data

-Use HubSpot Breeze Intelligence or third-party tools (e.g., ZoomInfo)
-Manually fill key data fields where needed (owner, industry, etc.)
-Export → Enrich → Re-import with updated values

Phase 3: Ongoing Maintenance & Prevention

Step 3.1: Set Up a Regular Cleaning Cadence

Monthly: Property audit, workflow review
Quarterly: Deduplication, formatting cleanup
Bi-Annually: User audit, record archive

Step 3.2: Create a Data Quality SOP

Document guidelines for:

-Team training and onboarding

-Creating new properties (naming conventions, usage rules)

-Ownership and responsibilities

-Restrictions and change approval processes

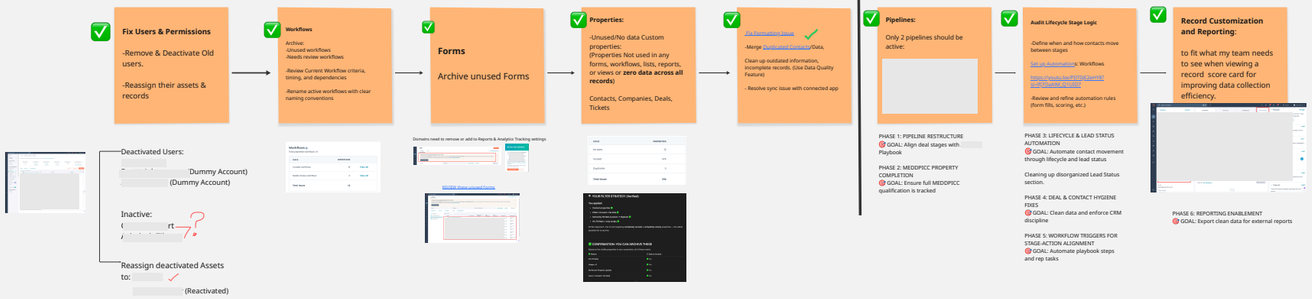
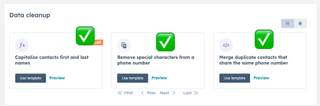
Step 3.3: Build QA and Automation Systems

-Enable alerts for data errors (missing fields, failed syncs)

-Run weekly audits on a random batch of contacts/deals

-Define data validation rules for incoming data (especially from integrations)

Step by Step:



Automations Added