🚔 Data Governance

> 📄 Data quality status report: https://app.hubspot.com/reports-dashboard/2592247/view/16465747

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📌 Data Governance documentation

📌 Database Size

- Total Contacts: 58,733 (36,286 non-marketing + **22,447 marketing contacts)**
- Total **Companies: 31,225**
- Total **Deals: 24,883**

📌 Marketing Contacts Breakdown

By Owner Distribution:

- Unassigned leads dominate at 10,149 contacts
- Top assigned owners: Kyle Kuehn (3,061), Russ Kirkpatrick (2,995), Robby Schwartz (1,411)

By Lifecycle Stage:

- Subscribers: 1,378
- Leads: 11,619
- Marketing Qualified Leads: 1,703
- Sales Qualified Leads: 1,502
- Opportunities: 4,377
- Customers: 1,020

📌 Company Intelligence

Top Company Profiles

- Core companies: 11,705
- Missing company data: 4,813
- Top identified companies include Outside (1,986) and Adjacent (1,851)

By Lifecycle Stage

- Leads: 14,488
- New companies: 9,736
- Marketing/Sales Qualified: 2,289 combined

📌 Data Quality Issues

- 16,772 marketing contacts are missing mobile phone numbers
- 3,968 contacts with uncategorized job titles
- 2,082 marketing contacts are missing a company association
- 6,988 companies without contacts
- 6,914 companies are missing domain information

📌 Deal Pipeline Status

- Total value across 24,883 deals
- The majority (22,914) have no owner assigned
- Pipeline distribution: Old (21,026), Old 2 (1,256), Ministry (963)
- Deal types: Net New (1,359), Ads (287), Consolidated (146)

📌 Action Items

Enrich marketing contacts' information:

I built an enrichment AI-powered automation on Clay with several AI automations to craft and update records based on pre-selected valuable sources.

1. Contact - Email: Email validation (if the email is not valid, it will search for the correct one)
2. Contact - personal LinkedIn URL
3. Contact - Current Job Title

4. Contact + Company association - AI will search and create the company if no company is associated with the contact.
5. Company - Website domain
6. Company - LinkedIn URL
7. Company - Industry
8. Company - Annual Revenue
9. Company - Employee count

> At this point, this table is connected with HubSpot, pulling the inputs on a daily schedule. However, the enrichment is set to be manually triggered until we are more comfortable with the sample results. After that, all the outputs for empty fields will be automatically inserted into HubSpot. Here is the table link on clay: 🟠Go to market with unique data — and the ability to act on it

Address the 10K+ unassigned contacts

I'm using segmentation rules, journey stages, and personas to ensure that all our data is covered with communication and that we are not losing potential leads. The idea is to cover all unworked leads by sending them to sales prospection or setting them as non-marketing.

> Here is the Hubspot properties documentation if you need any information on segmentation: 📌Hubspot Fields Documentation

Essential Issues to Review

▶ We have 22K deals in inactive pipelines with no owner. Is there any reason why we can't delete them? Every time HubSpot sees a deal, it will convert the contact into an opportunity or customer, and since the system doesn't know, we are not considering those pipelines.

▶ I'm also worried about the Ads&Others contacts, companies, and deals. I'm afraid of starting to use Hubspot for automated nurturing and prospecting, and missing any Ads&Other triggers that I'm unaware of.@Marco Santiago @andrea.laurent, please read this and give me feedback so I can proceed with the 1 and 2 action items. I won't do anything with the "issues to review, I'm just addressing it on your way. If you want, we can book a meeting to discuss it. I know that @Kyle Kuehn is also working with some enrichment tools. However, I see this as a separate initiative to generate MQLs, so I won't wait for that other initiative to move forward with this one, okay?