MONARCH

Template

Monarch HubSpot Audit Framework

For B2B Companies Scaling Sales from Pre-Revenue to $5M+

Summary

Unlock hidden revenue and streamline your sales engine with Monarch's free HubSpot Audit Framework—designed specifically for B2B companies scaling from pre-revenue to $5M+.

This powerful, operator-first checklist helps you:

★ Identify CRM hygiene issues and data gaps
★ Tune your pipelines and automate lead routing
★ Optimize sequences, templates, and enablement tools
★ Build dashboards that drive action—not vanity metrics
★ Align your tech stack from first touch to closed-won
★ Benchmark RevOps maturity with a simple scoring model

Format: Google Doc

Ideal for: Founders, Sales Leaders, RevOps Managers, and HubSpot Admins

Time to complete: ~30 minutes

AUDIT

1. CRM FOUNDATIONS

☑ Contact & Company Records

- Are contact records consistently formatted (e.g., names, job titles, email domains)?
- Are lifecycle stages being used correctly (e.g., Lead, MQL, SQL, Customer)?
- Are companies properly associated with contacts and deals?

☑ Data Hygiene & Deduplication

- Is HubSpot deduplication enabled?
- Is there a regular cadence for cleaning old/stale contacts?
- Are required properties being enforced on critical record types?

☑ Custom Properties

- Are properties standardized (naming conventions, dropdowns vs. text)?
- Are unused properties archived or consolidated?

---

2. PIPELINE & DEAL MANAGEMENT

☑ Deal Pipelines

- Are there separate pipelines for different GTM motions (e.g., Sales-led vs. Partner-led)?
- Are deal stages aligned with your actual sales process?

☑ Deal Hygiene

- Are close dates realistic and updated regularly?
- Are stale deals being cleaned or closed out systematically?

☑ Automation & SLAs

- Are deal stage transitions triggering tasks/emails/workflows?
- Are lead assignment and SLA breach notifications set?

---

3. SALES ENABLEMENT

☑ Sequences

- Are sequences tailored by persona or stage?
- Are reply and booking rates being monitored?

☑ Email Templates

- Are templates being tracked for opens/clicks/replies?
- Are they mapped to specific stages or triggers?

☑ Meeting Links & Calendar Integration

- Are reps using unique meeting links with appropriate routing?
  Is calendar sync working correctly for all reps?

---

4. REPORTING & DASHBOARDS

☑ RevOps Reporting

- Are there dashboards for:
  - Pipeline health
  - Activity tracking
  - Conversion rates
  - Forecasting vs. actuals

☑ Attribution

- Is first-touch and multi-touch attribution configured and usable?
- Are source properties (e.g., original source, recent conversion) populated?

☑ Custom Dashboards

- Are different roles (e.g., CSO, SDR Manager, Founder) getting role-specific reports?

---

5. AUTOMATION & WORKFLOWS

☑ Lead Routing

- Are inbound leads being routed by region, persona, or ICP match?
- Are reps notified automatically?

☑ Lifecycle Stage Automation

- Are lifecycle stages being automatically updated through workflows?

☑ Operational Workflows

- Are there cleanup workflows (e.g., set “Unqualified” if inactive for 90 days)?
- Are there alerts or escalations for stalled deals?

---

6. INTEGRATIONS & STACK ALIGNMENT

☑ Core Tools

- Is HubSpot integrated with marketing tools (e.g., LinkedIn Ads, Google Ads, Calendly)?
- Are key sales tools (e.g., Gong, ZoomInfo, Slack) syncing properly?

☑ Finance & Product Tools

- Are closed-won deals syncing to financial systems (e.g., QuickBooks, Stripe)?
- Are customer onboarding/product usage tools (e.g., Intercom, Segment) integrated?

7. STRATEGY ALIGNMENT

☑ ICP & Segmentation

- Is your CRM structured to support ICP filtering and prioritization?
  Can you segment reports and campaigns by ideal customer criteria?

☑ Buyer Journey

- Does your sales process reflect how customers actually buy?
- Are top friction points in the funnel visible and measurable?

☑ Sales & Marketing Alignment

- Are MQL definitions and lead handoff rules clearly defined and automated?

Output: RevOps Maturity Score

Example Scorecard. You could include a simple scoring rubric, e.g.:

CATEGROY	SCORE (0-5)	NOTES