

A row-by-row diagnostic checklist matching the five hygiene rules taught in the chapter. Use this version if you prefer reading prose to scanning a spreadsheet, or if you use a screen reader.

The XLSX version ([crm-hygiene-checklist.xlsx](#)) carries the same content in tabular form for diagnostic note-taking against your live data.

How to use this checklist

1. **Open it alongside your CRM.** Print the CSV or keep this Markdown version open in a second tab.
 2. **Walk through your data row by row.** Your saved Deals view from Section 3 is the natural starting point.
 3. **For each defect, write a one-sentence cause-and-consequence** (the chapter's recommended format): *"Deal #214 has no owner → won't appear in any rep's weekly pipeline → invisible to the forecast."*
 4. **Fix in priority order:** duplicates first (every other fix may depend on the surviving record), then owners, then stage integrity, then required fields, then recency.
 5. **Re-run the report after the hygiene pass**, not before. The chapter's reflex is *no report runs on un-vetted data*.
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Rule 1: Required fields complete

Why this rule protects the report. Reports run on populated data. Every blank required field is a record the report under-counts.

Checks

- **Contacts.** Every contact has *Email + First name + Last name + Company + Owner + Lifecycle stage + Lead source*.
 - **Pass criteria:** all required contact properties populated.
 - **Failure consequence:** reports under-count contacts; segmentation breaks; duplicates harder to detect.
 - **Fix:** fill the missing field, or remove the contact if it is not real.
- **Deals.** Every deal has *Deal name + Pipeline + Stage + Amount + Close date + Owner + Primary contact + Next step*.
 - **Pass criteria:** all required deal properties populated.
 - **Failure consequence:** reports under-count revenue; deals invisible to value-based rollups.
 - **Fix:** fill the missing field, or demote the deal stage until you have the evidence for it.

- **Closed Lost deals.** Every *Closed Lost* deal has a *Closed-lost reason*.
 - **Pass criteria:** Closed-lost reason is set.
 - **Failure consequence:** Closed Lost deals become noise; post-mortem analysis impossible.
 - **Fix:** set the reason from the dropdown; if you do not know, mark it *Other* and add a note.
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Rule 2: No duplicates

Why this rule protects the report. Duplicates double-count revenue, split history across records, and make outreach feel spammy.

Checks

- **Same person, separate records.**
 - **Pass criteria:** one contact record per email address.
 - **Failure consequence:** forecast double-counted; outreach feels spammy; relationship history split.
 - **Fix:** use the duplicate management tool to merge. On HubSpot Free, rely on auto-dedup at creation for contacts and companies, plus manual merge from each record's Actions menu. Deal duplicates must be identified manually in Deals view.
 - **Same company, separate records.**
 - **Pass criteria:** one company record per unique business.
 - **Failure consequence:** activity and deal history split across records; reporting unreliable.
 - **Fix:** merge company records using the duplicate tool. Companies are covered by the duplicate tool on HubSpot Free.
 - **Same deal, separate records.**
 - **Pass criteria:** one deal per unique opportunity.
 - **Failure consequence:** pipeline value double-counted; forecast inflated.
 - **Fix:** spot manually by scanning the Deals view for same-customer plus similar-amount records on the same pipeline. HubSpot Free does **not** provide a duplicate tool for deals — this scan is your only option until a paid tier or a different CRM provides one.
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Rule 3: Stage integrity

Why this rule protects the report. Stage integrity is the rule that hides the most bad news. Every stage carries an evidence requirement (see "Pipeline and Stages"); without the evidence, the stage is a lie that the pipeline value depends on.

Checks

- **Discovery**
 - **Pass criteria:** notes from a real discovery interaction are attached or written on the record.
 - **Failure consequence:** pipeline shows phantom early-stage activity; coverage looks healthier than it is.
 - **Fix:** demote to a prospecting list outside the pipeline until a real discovery contact happens.
 - **Qualified**
 - **Pass criteria:** documented qualification against the team's framework (BANT / MEDDIC / your own).
 - **Failure consequence:** pipeline shows phantom mid-funnel volume; forecasting unreliable.
 - **Fix:** demote to Discovery until qualification work is done.
 - **Proposal**
 - **Pass criteria:** the proposal or quote document is attached or linked on the record.
 - **Failure consequence:** Proposal-stage value is fictional; conversion rates become meaningless.
 - **Fix:** demote to Qualified until the proposal is actually sent.
 - **Negotiation**
 - **Pass criteria:** at least one round of written back-and-forth on terms exists on the record.
 - **Failure consequence:** Negotiation pipeline is the most over-stated stage in most CRMs; managers learn to distrust it.
 - **Fix:** demote to Proposal until written negotiation evidence exists.
 - **Closed Won**
 - **Pass criteria:** signed *and* counter-signed agreement attached or linked.
 - **Failure consequence:** Closed Won contains revenue that does not exist; commission and forecast both lie.
 - **Fix:** demote to *Verbal Commit* or *Negotiation* until the executed agreement lands. If revenue credit was already paid out, flag to your manager before publishing the corrected report — demoting Closed Won deals is a politically sensitive act, not a quiet CRM edit.
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Rule 4: Owner assigned

Why this rule protects the report. Orphan records rot; nobody is accountable; per-rep pipeline reports omit them silently.

Checks

- **Contacts.** Every contact has an *Owner*.
 - **Pass criteria:** Owner field populated with a real user.
 - **Failure consequence:** orphan contacts rot; outreach gaps form.
 - **Fix:** assign an owner. Default to yourself if the original owner has left and reassignment has not happened.
 - **Deals.** Every deal has an *Owner*.
 - **Pass criteria:** Owner field populated with a real user.
 - **Failure consequence:** orphan deals invisible to per-rep pipeline reports; revenue credit unclear.
 - **Fix:** assign an owner. Default to yourself temporarily and flag for proper reassignment.
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Rule 5: Recency

Why this rule protects the report. Stale deals inflate pipeline value and hide real coverage gaps behind dead deals.

Choosing your cadences. The numbers below are defaults. Your team's actual cadences depend on cycle length and motion: industrial sales might use 30 / 60 days, SaaS SMB might use 7 / 14 days, and an inside-sales SDR motion might use 3 / 7. Pick numbers that reflect *what should happen* on a healthy deal at each stage, then enforce them.

Checks

- **Active-stage deals (Qualified, Proposal, Negotiation, Verbal Commit).**
 - **Pass criteria:** last activity date within the team's agreed cadence (e.g., 14 days).
 - **Failure consequence:** stale deals inflate pipeline value; coverage gaps hidden.
 - **Fix:** either log the activity that has happened (and update *Next step*), or demote the deal to Discovery. If neither is justified, mark *Closed Lost* with reason *Other* and a note.
- **Discovery deals.**
 - **Pass criteria:** last activity date within a longer cadence (e.g., 30 days).
 - **Failure consequence:** stale Discovery deals clog the top of funnel and distort coverage metrics.
 - **Fix:** log activity, or move the contact back to a prospecting list outside the pipeline.