

FIELD REPORT

PORTAL AUDIT

PORTAL 1000001

STATUS: COMPLETE

Northwind Advisory (sample data)

HUBSPOT PORTAL 1000001

An audit of how the HubSpot account Northwind Advisory (sample data) is configured: data model, data quality, people and seats, automation and marketing assets and security activity. Prepared by Portal Audit.

ACCOUNT	OVERALL SCORE	FINDINGS	MODULES
Northwind Advisory (sample data)	81 / 100 Grade B	12 1 critical or high	11 all ok · 10 report sections
PORTAL ID	CONTENTS		
1000001			
DATE			
October 1, 2026			
PREPARED BY			
Portal Audit			
AUTHORSHIP			
Drafted with AI and checked against your audit data by software.			
ACCOUNT TYPE			

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The short version

Everything after this page is the detail behind these answers.

OVERALL SCORE	AI READINESS (OUR ESTIMATE)
81 / 100	59 / 100
Grade B	Estimate, not HubSpot's score

Do these first

- 1. Super admins within 2 or 10% of users**
Super admins can export all data, install apps, change security settings and delete objects; every extra one widens the blast radius.
- 2. Every record has an owner**
Unowned records fall out of every queue, task list and owner-based report; nobody follows up.
- 3. Idle users are removed and seats reclaimed**
Accounts nobody uses are an attack surface and paid seats nobody uses are wasted spend.

Seats

3 of 14 users have not logged in during the review window, and 2 of them hold a paid seat. Check whether those seats still need to be paid for.

Your next step

Start with “Super admins within 2 or 10% of users”. The full 30, 60 and 90 day plan is in the improvement plan, and everything behind these answers follows as the appendix.

Scorecard

81 / 100

GRADE · B

Overall configuration score across 5 assessed categories, 20 rules evaluated. Lowest: **Governance and security** (50).

Category	Score		Critical	High	Medium	Low
Data model	100 / 100		.	.	.	.
Data quality	76 / 100		.	.	2	1
Governance and security	50 / 100		.	1	3	.
Automation	88 / 100		.	.	.	3
Integrations	100 / 100		.	.	.	.
Limits	NOT ASSESSED		.	.	.	.

Top findings

HIGH	MEDIUM	LOW	INFO
■ 1	■ 5	□ 4	■ 2

01 ■ HIGH GOVERNANCE AND SECURITY GOV-003

Too many super admins

EVIDENCE

- 5 of 14 users (35.7%) are super admins. Allowed for 14 users: 2.

RECOMMENDATION

Keep super admins to 2 or 10% of users, whichever is higher; give others a permission set. Super admins can export all data, install apps and change security settings.

02

■ MEDIUM DATA QUALITY DQ-001

Low fill rates on key deals fields

EVIDENCE

- deals (610 records):
 - closedate 50% (target 90%, 305 missing);
 - hubspot_owner_id 75% (target 80%, 152 missing)

RECOMMENDATION

Backfill the missing deals values (import, workflow defaults, or owner assignment rules), then prevent new gaps with required fields on forms, pipeline stage requirements, or rotation/assignment workflows.

03

■ MEDIUM DATA QUALITY DQ-001

Low fill rates on key tickets fields

EVIDENCE

- tickets (1240 records):
 - hubspot_owner_id 30% (target 80%, 868 missing)

RECOMMENDATION

Backfill the missing tickets values (import, workflow defaults, or owner assignment rules), then prevent new gaps with required fields on forms, pipeline stage requirements, or rotation/assignment workflows.

04

■ MEDIUM GOVERNANCE AND SECURITY GOV-002

No permission sets (roles) in use

EVIDENCE

- 0 permission sets; 9 non-admin user(s) have individually configured permissions

RECOMMENDATION

Create permission sets per job function and assign them, so access is consistent, least-privilege and auditable. Review exports, bulk delete and settings access in particular.

05

■ MEDIUM GOVERNANCE AND SECURITY GOV-005

Failed logins in the review window

EVIDENCE

- 35 of 940 login attempts failed in the last 90 days (3.7%)
- Failed logins by country: US: 28, RO: 7

RECOMMENDATION

Review failed logins with the affected users, require 2FA (or SSO) for everyone, and check for logins from unexpected countries.

06

■ MEDIUM GOVERNANCE AND SECURITY GOV-006

Users with no login in the review window

EVIDENCE

- 3 of 14 users have no login in the last 90 days
- 2 on paid seats

RECOMMENDATION

Deactivate users who no longer need access and reclaim their paid seats; reassign their records first.

07

☐ LOW AUTOMATION AUTO-001

Inactive workflows

EVIDENCE

- 7 of 24 workflows are off (29.2%)
- Off: "Old webinar follow-up", "Q2 2024 promo", "Lead rotation (test)", "Renewal reminder v1", "Onboarding nurture (copy)", "Newsletter welcome" (+1 more)

RECOMMENDATION

Delete or archive workflows that are off and no longer needed (export their logic first if it documents a process); turn back on, with a review, any that should run. A clean workflow list makes troubleshooting and the 2026-27 API migration review faster.

08

☐ LOW AUTOMATION AUTO-003

Stale lists (segments)

EVIDENCE

- 1 of 4 lists have had no update or membership change in undefined+ days
- 1 of those are not used by any workflow, email or other asset

RECOMMENDATION

Delete stale lists that nothing references; move the rest into folders by owner/purpose. Fewer lists make segmentation and list-limit planning easier.

09

☐ LOW AUTOMATION AUTO-004

Empty lists

EVIDENCE

- 1 of 4 lists have 0 members

RECOMMENDATION

Fix the filters or delete empty lists; check whether any workflow or email depends on them first.

10

☐ LOW DATA QUALITY DQ-002

Unused custom properties

EVIDENCE

- 5 of 10 checked custom properties have no value on any record (50%)
- contacts: 5 (a, b, c, d, e)

RECOMMENDATION

Confirm with owners and integrations whether each empty property is still needed; archive the ones that are not (archived properties can be restored for 90 days). Unused fields clutter forms, views and the property limit.

2 more findings in the findings register at the end of this report.

Since the last audit

First audit for this portal. No earlier report to compare.

Cleanup list: what to review

These are the specific items behind the risks above. Review each one and keep, fix, or remove it. We only list setting names, never your contact, company or deal records.

Empty custom properties

No record has a value. Unused fields clutter forms and reports.

Object	Label	Internal name	Suggested action
contacts	a	a	Delete or hide if no longer needed. DQ-002 Q-01
contacts	b	b	Delete or hide if no longer needed. DQ-002 Q-02
contacts	c	c	Delete or hide if no longer needed. DQ-002 Q-03
contacts	d	d	Delete or hide if no longer needed. DQ-002 Q-04
contacts	e	e	Delete or hide if no longer needed. DQ-002 Q-05

Disabled workflows

Turned off but still in the account.

Workflow	Suggested action
Old webinar follow-up	Delete if retired, or turn back on. AUTO-001 Q-06
Q2 2024 promo	Delete if retired, or turn back on. AUTO-001 Q-07
Lead rotation (test)	Delete if retired, or turn back on. AUTO-001 Q-08
Renewal reminder v1	Delete if retired, or turn back on. AUTO-001
Onboarding nurture (copy)	Delete if retired, or turn back on. AUTO-001
Newsletter welcome	Delete if retired, or turn back on. AUTO-001
Trial expiry alert	Delete if retired, or turn back on. AUTO-001

Super admins

Full access to everything.

Allowed for 14 users: 2

Role	Count	Suggested action
Super admin	5	Keep super admins to 2 or 10% of users, whichever is higher; give others a permission set. GOV-003

06 / QUESTIONS
FOR YOU

Questions for you

The audit cannot decide these from configuration and counts. 8 still need an answer.

Custom properties

Q-01	Is the contacts property "a" (a) still needed, or should it be archived? Options: Keep it / Archive it / Delete it / Not sure yet.
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Q- Is the contacts property "b" (b) still needed, or should it be archived? Options: Keep it / Archive it / Delete it /
02 Not sure yet.

Q- Is the contacts property "c" (c) still needed, or should it be archived? Options: Keep it / Archive it / Delete it /
03 Not sure yet.

Q- Is the contacts property "d" (d) still needed, or should it be archived? Options: Keep it / Archive it / Delete it /
04 Not sure yet.

Q- Is the contacts property "e" (e) still needed, or should it be archived? Options: Keep it / Archive it / Delete it /
05 Not sure yet.

Workflows that are off

Q- Should the workflow "Old webinar follow-up" be turned on or deleted? Options: Turn it on / Keep it / Delete it
06 / Not sure yet.

Q- Should the workflow "Q2 2024 promo" be turned on or deleted? Options: Turn it on / Keep it / Delete it / Not
07 sure yet.

Q- Should the workflow "Lead rotation (test)" be turned on or deleted? Options: Turn it on / Keep it / Delete it /
08 Not sure yet.

Improvement plan

12 actions in three phases, ordered by impact and effort.

30 DAYS	60 DAYS	90 DAYS
4	8	0
First 30 days: quick, high-impact fixes	Days 31-60: process and data improvements	Days 61-90: larger or lower-priority work

First 30 days: quick, high-impact fixes 4 ITEMS

Action	Impact / effort
Super admins within 2 or 10% of users PLAN-01 Super admins can export all data, install apps, change security settings and delete objects; every extra one widens the blast radius. Ref: GOV-003 BP-GOV-01	H / S
Every record has an owner PLAN-02 Unowned records fall out of every queue, task list and owner-based report; nobody follows up. Ref: DQ-001 BP-DQ-02	H / S
Idle users are removed and seats reclaimed PLAN-03 Accounts nobody uses are an attack surface and paid seats nobody uses are wasted spend. Ref: GOV-006 BP-GOV-05 GAP-04	M / S
Service tickets are owned and moved through a pipeline PLAN-04 Unowned tickets are not worked; pipeline stages make SLAs and backlog visible. Ref: DQ-001 BP-SP-04	M / S

Days 31-60: process and data improvements 8 ITEMS

Action	Impact / effort
Non-admin users get access through permission sets PLAN-05 Permission sets make access consistent, least-privilege and reviewable; hand-configured users drift. Ref : GOV-002 BP-GOV-02	H / M
Custom objects hold real data PLAN-06 Custom objects add schema, associations and limits to maintain; one with almost no records is usually an abandoned design or an unfinished integration. Ref : DM-006 BP-DM-04 GAP-02	M / M
Unused custom properties are archived PLAN-07 Empty fields clutter forms and record pages, confuse users and count against the property limit. Ref : DQ-002 BP-DQ-05 GAP-03	M / M
Teams mirror the organisation PLAN-08 Teams drive team-only record access, team reporting and round-robin assignment. Ref : BP-GOV-03	M / S
Connected apps are reviewed PLAN-09 Every installed app holds scoped access to CRM data; unreviewed installs accumulate. Ref : INT-004 BP-GOV-07	M / S
Workflows that are off are cleaned up PLAN-10 A long tail of off workflows hides which automation is live and slows troubleshooting and API-migration reviews. Ref : AUTO-001 BP-AUTO-01	M / S
Deals carry amount, close date, company and contact PLAN-11 Forecasts, win-rate and attribution reports are only as good as these four fields. Ref : DQ-001 BP-DQ-03	H / M
Lists (segments) are maintained PLAN-12 Stale and empty lists clutter segmentation and count toward list limits. Ref : AUTO-003 AUTO-004 BP-AUTO-03 GAP-01	L / S

priority = impact (H3/M2/L1) × status weight (fail 1.0, gap 0.8, partial 0.6) × 1.3 if a related finding is critical/high, ÷ effort (S1/M1.6/L2.5). 30 days: priority ≥ 2.0 and effort S/M (max 6 items); 60 days: priority ≥ 1.0 (max 8); 90 days: the rest and all L-effort items.

Usage gaps

4 places where the portal has a capability that is not being used.

Hub tiers are inferred from user seat names. Partner seats are partner or agency access, not a paid hub seat.

Not assessed: Product library use on quotes and line items (quotes or line item counts are not in this report); Marketing contacts (limits module not available); Form submission counts for captured (non-HubSpot) forms are not assessed. The forms API returns the form name, type, and dates, not a submission total (<https://developers.hubspot.com/docs/api-reference/2026-09-beta/marketing/forms/get-form>). The submissions endpoint returns each submission's fields, which this audit does not read (https://developers.hubspot.com/docs/api-reference/legacy/marketing/forms/v1/get-form-integrations-v1-submissions-forms-form_guid). An older analytics report can return a submissions total (https://developers.hubspot.com/docs/api-reference/legacy/reporting/reports/get-analytics-v2-reports-object_type-time_period), but it is not the forms permission, and the published schema does not say the rows are captured forms.; Hub subscriptions without assigned seats (no subscription API for apps; tiers inferred from seat names only); Seat-based gaps (no hub seat names found on users)

Gap	Impact	Recommendation
Lists built but stale or empty GAP - 01 Has: 4 lists Uses: 1 stale, 1 empty, 2 unreferenced	L	Delete unreferenced stale or empty lists, and fix filters on active lists that should have members.
Custom objects defined but barely used GAP - 02 Has: 1 custom object(s) defined Uses: widgets: 2 records	L	Confirm which process or integration should populate each object. Finish it, or retire the object.
Custom fields built but never filled GAP - 03 Has: 10 custom properties checked Uses: 5 have no value on any record (50%)	M	Archive fields nobody fills. For the ones that matter, add them to forms, record layouts, or the integration that should write them.
Paid seats with no logins GAP - 04 Has: 2 user(s) on paid seats Uses: no login in 90 days	M	Reassign or remove paid seats from users who are not logging in.

GAP-01 Lists built but stale or empty

What we measured: Stale lists plus empty lists, divided by all lists. Fires when that share is at least 30%.

Where to check in HubSpot: Segments (lists).
<https://knowledge.hubspot.com/segments/create-active-or-static-lists>

Improvement plan: PLAN-12.

GAP-02 Custom objects defined but barely used

What we measured: Records on each custom object. Fires when any defined object has fewer than 10 records.

Examples: `widgets` .

Where to check in HubSpot: Custom objects. <https://knowledge.hubspot.com/object-settings/create-custom-objects>

Improvement plan: PLAN-06.

GAP-03 Custom fields built but never filled

What we measured: Custom properties with no value on any record, divided by custom properties checked. Fires when that share is at least 25%.

Examples: `a` ; `b` ; `c` ; `d` ; `e` .

Where to check in HubSpot: Property settings.
<https://knowledge.hubspot.com/properties/create-and-edit-properties>

Improvement plan: PLAN-07. Question: Q-01, Q-02, Q-03, Q-04, Q-05.

GAP-04 Paid seats with no logins

What we measured: Users on a paid hub seat whose id is absent from logins in the last 90 days. Names and email addresses are not listed.

Examples: `service-professional` ; `sales-enterprise` .

Where to check in HubSpot: Account name, then Account & Billing, then Seats. Login history is in account activity: <https://knowledge.hubspot.com/account-management/view-and-export-account-activity-history>
<https://knowledge.hubspot.com/account/manage-your-hubspot-subscription>

Improvement plan: PLAN-03.

Best practices

37 HubSpot best practices checked against this portal. Each one cites the HubSpot page it comes from, or is marked as opinion.

PASS	PARTIAL	FAIL	NOT APPLICABLE / NOT ASSESSED
8	4	8	1 / 16

Practice	Status	Impact	Source
Lists (segments) are maintained BP - AUTO - 03 4 lists: 1 stale, 1 empty, 2 unreferenced	FAIL	L	Create active or static lists (segments)
Custom objects hold real data BP - DM - 04 widgets: 2 records	FAIL	M	Create custom objects
Every record has an owner BP - DQ - 02 contacts.hubspot_owner_id: 100% of 18400 (target 80%); deals.hubspot_owner_id: 75% of 610 (target 80%)	FAIL	H	opinion
Unused custom properties are archived BP - DQ - 05 5 of 10 custom properties are empty on every record (50%)	FAIL	M	Create and edit properties
Super admins within 2 or 10% of users BP - GOV - 01 5 of 14 users are super admins (35.7%). Allowed for 14 users: 2.	FAIL	H	HubSpot user permissions guide: Super Admin
Non-admin users get access through permission sets BP - GOV - 02 0 permission sets; 9 non-admin users	FAIL	H	HubSpot user permissions guide
Idle users are removed and seats reclaimed BP - GOV - 05 3 of 14 users with no login in 90 days (2 on paid seats)	FAIL	M	opinion
Service tickets are owned and moved through a pipeline BP - SP - 04 tickets.hubspot_owner_id: 30% of 1240 (target 80%); tickets.hs_pipeline_stage: 100% of 1240 (target 99%)	FAIL	M	opinion
Workflows that are off are cleaned up BP - AUTO - 01 7 of 24 workflows are off (29.2%)	PARTIAL	M	Organize your workflows
Deals carry amount, close date, company and contact BP - DQ - 03 deals.amount: 95% of 610 (target 80%); deals.closedate: 50% of 610 (target 90%)	PARTIAL	H	Set up pipeline rules
Teams mirror the organisation BP - GOV - 03 2 teams; 9 of 14 users without a team	PARTIAL	M	Teams API
Connected apps are reviewed BP - GOV - 07 2 install and 0 uninstall events in the window: review needed	PARTIAL	M	Manage your connected apps
Custom properties live in named custom groups BP - DM - 02 0 of 10 custom properties on core objects sit in default groups	PASS	L	Create and edit properties

Practice	Status	Impact	Source
Contacts have email, name and lifecycle stage BP - DQ - 01 contacts.email: 98% of 18400 (target 90%); contacts.lifecyclestage: 100% of 18400 (target 90%)	PASS	H	Set validation rules for properties
Login and security activity is reviewed BP - GOV - 04 35 of 940 logins failed in 90 days (3.7%)	PASS	M	View and export account activity history
Records of deactivated users are reassigned BP - GOV - 06 0 active owners linked to deactivated users	PASS	M	opinion
New integrations use service keys or project apps, not legacy keys BP - INT - 04 0 legacy credential creation event(s) and 0 other legacy credential event(s) in the window	PASS	H	Account service keys
Lead capture uses HubSpot forms that are maintained BP - MA - 01 1 HubSpot form(s), 1 forms in total; 0 not updated in 365 days	PASS	M	Create forms
Marketing emails nurture contacts BP - MA - 02 1 batch/automated marketing email(s) of 1 emails; 0 draft(s) and 1 published across all types (0 are ticket emails)	PASS	M	Create automated emails to use in workflows
Lifecycle stage is set on every contact BP - MA - 03 lifecycle stage set on 100% of 18400 contacts	PASS	M	opinion
Sensitive data is marked and protected BP - GOV - 08 not a regulated industry (per confirmed profile)	NOT APPLICABLE	H	Store sensitive data
No empty or unfinished workflows BP - AUTO - 02 workflow details not available	NOT ASSESSED	L	Create workflows
Ownership is assigned automatically BP - AUTO - 04 workflow details not available	NOT ASSESSED	M	Choose your workflow actions
Every custom property has a description BP - DM - 01 properties module not available	NOT ASSESSED	M	Create and edit properties
No duplicate property labels BP - DM - 03 properties module not available	NOT ASSESSED	L	Create and edit properties
Association labels describe key relationships BP - DM - 05 association labels not available	NOT ASSESSED	L	Create and use association labels
Companies have a domain and industry BP - DQ - 04 fill rates not available	NOT ASSESSED	M	opinion
Validation rules guard key properties BP - DQ - 06 property validation rules are not collected by this audit version (manual check)	NOT ASSESSED	M	Set validation rules for properties
No legacy private apps in use BP - INT - 01 private app usage not available	NOT ASSESSED	H	Legacy private app creation sunset
Custom code uses date-versioned APIs and current credentials BP - INT - 02 workflow details not available	NOT ASSESSED	H	Custom code actions

Practice	Status	Impact	Source
Workflow webhook receivers are known and verified BP - INT - 03 workflow details not available	NOT ASSESSED	M	Use webhooks with HubSpot workflows
Integrations checked against the 2026-27 API retirements BP - INT - 05 which endpoints integrations call is not visible through the API (manual check, playbook 03)	NOT ASSESSED	H	Legacy APIs and legacy apps: what's going unsupported and when
Headroom on record and property limits BP - LIM - 01 limits not available	NOT ASSESSED	M	Limits tracking API
Headroom on pipelines, custom objects and association labels BP - LIM - 02 limits not available	NOT ASSESSED	L	Limits tracking API
Pipeline stages reflect the real process BP - SP - 01 deal pipelines not available	NOT ASSESSED	M	opinion
Pipelines have closed stages and a manageable number of stages BP - SP - 02 pipelines not available	NOT ASSESSED	L	opinion
Pipeline count fits deal volume BP - SP - 03 pipelines or deal count not available	NOT ASSESSED	L	opinion

AI readiness (Context Home)

How ready this portal’s data is for HubSpot’s AI (Breeze), scored from the four inputs HubSpot names for high-quality context: actively populated CRM fields, logged activity, connected integrations and configured team settings.

Estimate, not HubSpot’s score.

OUR ESTIMATE

59/100

Estimate, not HubSpot’s score · developing

HUBSPOT CONTEXT HOME SCORE



Not entered (no API); enter it by hand

HubSpot’s own Context Home completeness score has not been entered. Read it in HubSpot (Agents › Agent Hub › Context) and enter it to see the two side by side.

Sub-scores and evidence

Input (HubSpot's wording)	Sub-score	Confidence	Evidence (source)
Actively populated CRM fields Mean fill rate of the audit's key fields on contacts, companies, deals and tickets (80%), plus the share of custom properties that hold any value (20%).	75	high	Mean fill rate across 8 key fields: 81%. <code>audit:dataQuality.fillRates</code> Lowest: tickets hubspot_owner_id 30%; deals closedate 50%; deals hubspot_owner_id 75%. <code>audit:dataQuality.fillRates</code> 5 of 10 custom properties hold a value on at least one record (50%). <code>audit:dataQuality.customProperties</code> Related findings: DQ-001, DQ-002. <code>DQ-001</code> Limits: Key fields are the audit's list, not HubSpot's; HubSpot does not publish which fields its score reads.
Logged activity Share of contacts, companies and deals with a logged activity (Last activity date) in the last 90 days (70%) and ever (30%).	51	medium	contacts: 11500 of 18400 (63%) have a logged activity; 5200 (28%) in the last 90 days. <code>audit:dataQuality.activity</code> companies: 1900 of 2650 (72%) have a logged activity; 1100 (42%) in the last 90 days. <code>audit:dataQuality.activity</code> deals: 540 of 610 (89%) have a logged activity; 330 (54%) in the last 90 days. <code>audit:dataQuality.activity</code> Limits: Uses "Last activity date" (notes_last_updated); activities logged only on tickets or custom objects are not counted. Email/calendar sync status per user is not readable via the API.

Input (HubSpot's wording)	Sub-score	Confidence	Evidence (source)
Connected integrations Points for each kind of evidence: integration installs in the security log (25, or 35 for 5+), integrations identified by their property groups (20, +5 per extra app up to 30), private-app/API use (10), workflow actions from apps, webhooks or custom code (5). Capped at 80 because the API cannot list connected apps.	25	low	2 integration install and 0 uninstall events in the last 90 days. <code>audit:security.integrationEvents</code> Related findings: INT-004. INT-004 Limits: HubSpot's API returns install/uninstall events but not the list of connected apps, so app names come only from property groups; install events also count re-installs (including this audit app). Inbox, calendar and Slack connections are not visible to the audit.
Configured team settings Equal parts: teams exist; active owners on a team; users with a role/permission set; super admins ≤25% of users; no active owners tied to deactivated users.	83	medium	2 teams configured. <code>audit:usersAndTeams.users</code> 3 of 8 active owners have no team. <code>audit:owners</code> 0 active owners belong to deactivated users. <code>audit:owners</code> 4 of 14 users have no role (permission set); 0 roles defined. <code>audit:usersAndTeams.users</code> 5 of 14 users are super admins (36%). <code>audit:usersAndTeams.users</code> Related findings: GOV-003, GOV-002. GOV-003 Limits: Per-user Context Home settings (user profile, email personality) are not readable via the API.

Weighted mean of the four inputs HubSpot names for high-quality context (equal weights). Bands: 0-39 low, 40-69 developing, 70-100 strong. HubSpot has no public API for Context Home or its score (developer changelog checked 2026-10-02).

Sources: HubSpot: Context Home product page · HubSpot Fall 2026 Spotlight (Context Home completeness score) · HubSpot KB: Manage your Breeze context (updated Sep 16, 2026) · HubSpot developer changelog (no Context Home API as of 2026-10-02)

Account

STATUS · OK · 0.0
S

ACCOUNT TYPE	DATA HOSTING	CURRENCY	TIME ZONE
Standard	—	—	US/Eastern

Record counts

STATUS · OK · 0.0
S

RECORDS COUNTED	OBJECT TYPES	LARGEST OBJECT
22,902	5	Contacts 18,400 records · 80% of total

Object	Records	Share
Contacts	18,400	80%
Companies	2,650	12%
Deals	610	3%
Tickets	1,240	5%
Widgets	2	0%

Data quality

STATUS · OK · 0.0
S

KEY FIELDS CHECKED	BELOW TARGET	UNUSED CUSTOM PROPERTIES	SEARCH CALLS
8 3 objects	3 38% of fields	5 50% of 10 custom	10 / — No checks skipped

Custom properties 10

Object	Custom	Empty	No description
Contacts	10	5	0

Lowest key-field fill rates 8

Object	Field	Fill rate	
Tickets	hubspot_owner_id	30%	
Deals	closedate	50%	
Deals	hubspot_owner_id	75%	
Deals	amount	95%	
Contacts	email	98%	
Contacts	hubspot_owner_id	100%	
Contacts	lifecyclestage	100%	
Tickets	hs_pipeline_stage	100%	

Scores use only the key fields. The full list, one row per property, is in properties.csv.

14 / PEOPLE AND SEATS

People and seats

T · OK · 0.0 S
T · OK · 0.0 S

USERS

14

SUPER ADMINS

5

36% of users. Allowed for 14 users: 2

ACTIVE OWNERS

8

1 archived

TEAMS · ROLES

2 · 0

Measure	Value
Active owners without a team	3
Active owners linked to a deactivated user	0
Users without a team	9
Non-admin users without a role	4
Empty teams	0

Owners 9

Owner	Type	User active	Teams	Status
Avery Quinlan		—	—	ACTIVE
Morgan Okafor		—	—	ACTIVE
Riley Stavros		—	—	ACTIVE
Jordan Pell		—	—	ACTIVE
Sam Whitlock		—	—	ACTIVE
Taylor Brandt		—	—	ACTIVE
Casey Ng		—	—	ACTIVE
Devon Marsh		—	—	ACTIVE
Riley Stavros		—	—	ARCHIVED

15 / CUSTOM
OBJECTS

Custom objects

STATUS · OK · 0.0
S

CUSTOM OBJECTS	PROPERTIES ON CUSTOM OBJECTS	ASSOCIATION TYPES
1	0	0

Object	Type ID	Primary display	Required	Properties	Associations	Created
Widgets widgets	2-1	—	—	—	—	—

16 / WORKFLOWS

Workflows

STATUS · OK · 0.0
S

WORKFLOWS	ON	OFF	WEBHOOK ACTIONS	CUSTOM CODE ACTIONS
24	17	7	0	0

Workflow register 24

Workflow	Status	Object	Enrollment	Actions	Updated
Live workflow 1	ON			—	—
Live workflow 2	ON			—	—

Workflow	Status	Object	Enrollment	Actions	Updated
Live workflow 3	ON			—	—
Live workflow 4	ON			—	—
Live workflow 5	ON			—	—
Live workflow 6	ON			—	—
Live workflow 7	ON			—	—
Live workflow 8	ON			—	—
Live workflow 9	ON			—	—
Live workflow 10	ON			—	—
Live workflow 11	ON			—	—
Live workflow 12	ON			—	—
Live workflow 13	ON			—	—
Live workflow 14	ON			—	—
Live workflow 15	ON			—	—
Live workflow 16	ON			—	—
Live workflow 17	ON			—	—
Old webinar follow-up	OFF			—	—
Q2 2024 promo	OFF			—	—
Lead rotation (test)	OFF			—	—
Renewal reminder v1	OFF			—	—
Onboarding nurture (copy)	OFF			—	—
Newsletter welcome	OFF			—	—
Trial expiry alert	OFF			—	—

Lists (segments)

STATUS · OK · 0.0
S

LISTS	EMPTY	NOT REFERENCED	STALE (→ DAYS)
4	1	2 by workflows, emails or other assets	1 1 also unreferenced

Forms

STATUS · OK · 0.0
S

FORMS	ARCHIVED	NOT UPDATED IN 365 DAYS
1	—	0

Form type	Count	Share
Hubspot	1	100%

Captured forms

No captured (non-HubSpot) forms in this report.

Newest captured form was has no created date. Newest HubSpot form was is not in this report.

Form submission counts for captured (non-HubSpot) forms are not assessed. The forms API returns the form name, type, and dates, not a submission total (<https://developers.hubspot.com/docs/api-reference/2026-09-beta/marketing/forms/get-form>). The submissions endpoint returns each submission's fields, which this audit does not read (https://developers.hubspot.com/docs/api-reference/legacy/marketing/forms/v1/get-form-integrations-v1-submissions-forms-form_guid). An older analytics report can return a submissions total (https://developers.hubspot.com/docs/api-reference/legacy/reporting/reports/get-analytics-v2-reports-object_type-time_period), but it is not the forms permission, and the published schema does not say the rows are captured forms.

Marketing emails

STATUS · OK · 0.0
S

EMAILS	PUBLISHED	DRAFTS	TRANSACTIONAL	A/B TESTS
1	1	0	—	—

Type	Count	Share
Batch email	1	100%

Security and account activity

Activity over the last 90 days. Counts only: no IP addresses or user details are shown.

LOGINS	FAILED LOGINS	SECURITY EVENTS	INTEGRATION INSTALLS	CRITICAL ACTIONS
940	35	5	2	—
11 users	4% of attempts		0 uninstalls	

Failed logins by country			
country	Count	Share	
US	28	80%	
RO	7	20%	

Security activity by type 0 TYPES

Gaps and limits

- 01
- Left out of your score, not assessed:** Custom properties without descriptions (couldn't be checked this time) DM-001. What unlocks it: Nothing to do. It is retried on the next audit. Duplicate custom property labels (couldn't be checked this time) DM-002. What unlocks it: Nothing to do. It is retried on the next audit. Default or template deal stage names (couldn't be checked this time) DM-004. What unlocks it: Nothing to do. It is retried on the next audit. Pipelines without a closed stage or with many stages (couldn't be checked this time) DM-005. What unlocks it: Nothing to do. It is retried on the next audit. Workflows with no actions (couldn't be checked this time) AUTO-002. What unlocks it: Nothing to do. It is retried on the next audit. Legacy private apps are making API calls (couldn't be checked this time) INT-001. What unlocks it: Nothing to do. It is retried on the next audit. Workflow custom code actions (couldn't be checked this time) INT-002. What unlocks it: Nothing to do. It is retried on the next audit. Workflow webhook actions (couldn't be checked this time) INT-003. What unlocks it: Nothing to do. It is retried on the next audit. Approaching account limits (couldn't be checked this time) LIM-001. What unlocks it: Nothing to do. It is retried on the next audit. These checks do not count for or against your score.

Findings register

#	Severity	Category	Finding	Recommendation
01	 HIGH	Governance and security	Too many super admins GOV-003	Keep super admins to 2 or 10% of users, whichever is higher; give others a permission set. Super admins can export all data, install apps and change security settings.
02	 MEDIUM	Data quality	Low fill rates on key deals fields DQ-001	Backfill the missing deals values (import, workflow defaults, or owner assignment rules), then prevent new gaps with required fields on forms, pipeline stage requirements, or rotation/assignment workflows.
03	 MEDIUM	Data quality	Low fill rates on key tickets fields DQ-001	Backfill the missing tickets values (import, workflow defaults, or owner assignment rules), then prevent new gaps with required fields on forms, pipeline stage requirements, or rotation/assignment workflows.
04	 MEDIUM	Governance and security	No permission sets (roles) in use GOV-002	Create permission sets per job function and assign them, so access is consistent, least-privilege and auditable. Review exports, bulk delete and settings access in particular.
05	 MEDIUM	Governance and security	Failed logins in the review window GOV-005	Review failed logins with the affected users, require 2FA (or SSO) for everyone, and check for logins from unexpected countries.
06	 MEDIUM	Governance and security	Users with no login in the review window GOV-006	Deactivate users who no longer need access and reclaim their paid seats; reassign their records first.
07	 LOW	Automation	Inactive workflows AUTO-001	Delete or archive workflows that are off and no longer needed (export their logic first if it documents a process); turn back on, with a review, any that should run. A clean workflow list makes troubleshooting and the 2026-27 API migration review faster.
08	 LOW	Automation	Stale lists (segments) AUTO-003	Delete stale lists that nothing references; move the rest into folders by owner/purpose. Fewer lists make segmentation and list-limit planning easier.
09	 LOW	Automation	Empty lists AUTO-004	Fix the filters or delete empty lists; check whether any workflow or email depends on them first.
10	 LOW	Data quality	Unused custom properties DQ-002	Confirm with owners and integrations whether each empty property is still needed; archive the ones that are not (archived properties can be restored for 90 days). Unused fields clutter forms, views and the property limit.
11	 INFO	Data model	Custom objects in use DM-006	Document the purpose, owner and integrations for each custom object, and confirm its associations and required properties match how records are created.
12	 INFO	Integrations	Integrations installed in the review window INT-004	Confirm each newly installed app is approved, has an owner, and requests only the scopes it needs (Settings → Connected apps).

How this audit was created

This audit read the portal through the Portal Audit app installed in this HubSpot account. Nothing in the portal was changed: the app only sends read requests, and its HubSpot client blocks anything else.

What was checked

Data model, data quality, people and seats, automation and marketing assets and security activity. Only configuration and aggregate counts are kept: no contact details, email addresses or IP addresses are stored in this report.

Time windows

- Configuration and counts as of October 1, 2026 at 9:00 AM EDT.
- Logins and security activity: the last 90 days.
- Logged activity on records: the last 90 days.
- Stale lists: not updated in 180 days. Forms: not updated in 365 days. Draft marketing emails: not edited in 180 days.

How the scores are calculated

Each category starts at 100 and loses points for every finding in it: 40 for critical, 20 for high, 10 for medium, 4 for low, 0 for information. The overall score is the weighted average of the categories that could be assessed (Data model $\times 1$, Data quality $\times 1.25$, Governance and security $\times 1.25$, Automation $\times 1$, Integrations $\times 1$, Limits $\times 0.75$). Any critical finding caps the overall score at 59. Reaching a pipeline limit is rated medium at most: it stops you adding another pipeline but doesn't break anything already set up, so it doesn't trigger the cap. Grades: A from 90, B from 80, C from 70, D from 60, F below 60 (so a capped score is F). Data quality scores use key fields only. Every property that was checked is listed in properties.csv.

Run details

Field	Value
Generated	October 1, 2026 at 9:00 AM EDT
HubSpot API version	2026-09 (platform 2026.09)
HubSpot requests	0 read requests
CRM searches	0 of 250 allowed
Permissions granted	0