WORK SHEET

HubSpot CRM: Data Cleanse Checklist

Maintaining a clean database is key to growing a business, because it allows you to have insight on your leads and customers so you can provide an engaging and delightful experience. Data that's out of date can contribute to low email deliverability scores and ultimately costs your business money and time.

Review the checklist items below to ensure your business is maintaining a clean CRM. We recommend scheduling time to check on your database at least once per quarter.

1. Write down all the apps you're using outside of HubSpot.
   a. What app are you currently using in addition to HubSpot? (ex. Eventbrite, Zoom, etc.)
   b. Check out the App Marketplace to see if the apps you're using can be connected to HubSpot.
   c. Integrate or explore a potential alternative.
2. Remove contacts that have hard bounced on marketing emails
3. Review custom properties
   a. Replace **Single-line text** properties with **Dropdown select** to standardize options. This will also lead to easier reporting for this property.
4. Review workflows
   a. Look for inactive or duplicate workflows
   b. Check for out-of-date workflows. Is the content using old emails? Are the enrollment triggers and suppression lists still relevant?
   c. Archive old workflows
   d. Create a naming convention (ex. Internal_Enrollment Trigger_Goal)
5. Access and permissions
   a. Check out the User Permissions Guide
   b. For Super Admins/Admins
      i. Review admin access for all employees
      ii. Is there anyone whose permissions need to be changed?
   c. For Individual Contributors:
      i. What tools or data sets do you need access to?
      ii. What data would make it easier for you to do your job?