

# Northlane

## HubSpot CRM Audit

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July 2026

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# Executive Summary

Northlane's portal is a mature, heavily used HubSpot instance that has outgrown its own governance. It runs Marketing Hub Professional and Sales Hub Enterprise across 78,259 contacts, 31,671 companies, and 6,577 deals, with deep activity logging (77,390 emails, 20,650 meetings, 12,785 calls). Recent deal data is trustworthy at a self-rated 8/10, but historical contact and company data sits closer to 3/10 after the v2 scope change moved learner data to Northlane's proprietary platform and left HubSpot as a client-account-only system. The net is a portal rich in inputs but thin in trust: 2,000+ duplicate contacts, 1,700+ duplicate companies, 11-18% average fill rates, and 356 properties with zero data.

Underneath, the pattern is accumulated tech debt, not neglect. Northlane is built to be a small giant: intentionally lean, focused on getting the most out of its talent rather than adding headcount for its own sake. To cover ground with a small team, it leaned on a widening set of point tools, and that is where the debt built up. Outreach and nurture now runs in an outside sales automation platform, learner data in the proprietary platform, and reporting in spreadsheets, while the portal itself has accumulated 114 user records (only 30 active today), 156 dormant sequences, and 315 undocumented workflows. HubSpot already funds the capability to run most of this natively. The through-line for every recommendation that follows is the same: centralize the revenue motion in HubSpot and automate the manual work so a focused team operates with far more leverage.

The priorities align tightly with leadership's goals. The VP of Sales' mandate, "if it doesn't happen in HubSpot, it didn't happen," depends on three things the portal cannot yet deliver: trustworthy data, automated capture of manual input such as post-call notes and follow-up timing, and insight surfacing that tells the team when to act. The highest-leverage moves are (1) standing up scalable delivery tracking before deal volume spikes in roughly two months, (2) cleaning the data foundation, (3) reactivating the automation the Enterprise subscription already funds, and (4) syncing the proprietary platform and outside sales tooling into HubSpot while tightening the ERP integration. User cleanup is a fast security win rather than a strategic priority: seats are within subscription, so the work is limited to enabling 2FA and trimming super admins.

- **Pipeline Readiness:** Program deliveries, the actual revenue event, are tracked manually in the Active Deals pipeline and will break when deal volume spikes in roughly two months. Stand up the parked Delivery pipeline or a dedicated custom object, kept separate from Active Deals for clean reporting.
- **Platform Integration:** The proprietary platform sits outside HubSpot; a one-way feed of deliveries, credits, and completion status removes the manual work the VP of Sales flagged as his top pain point. The ERP drives invoices but needs a configuration review, since most invoices today carry no associated company record.
- **Data Foundation:** An estimated 2,000+ duplicate contacts and 1,700+ duplicate companies, plus 356 zero-fill properties, undermine reporting; historical contact data self-rated 3/10 makes any reawaken-old-leads campaign risky until cleanup happens.
- **Dormant Automation:** 156 sequences and the marketing email program stopped in fall 2025 despite a paid Sales Enterprise subscription; reactivation is high-value and low-cost.

- **Automation Payoff:** Post-call notes, next-step creation, closed-lost timing, and credit-depletion upsell triggers are all manual today and represent the clearest ROI for a leaner, focused team.
- **Users & Seat Governance:** Only 30 of 114 user records are active and seats are within subscription, so there is no cost exposure. The real risk is access hygiene: 12 super admins, 26 users without 2FA, and 28 of 30 active users with no team assignment.

# Audit Summary

## HubSpot Subscription

Hub	Tier	Notes
Marketing Hub	Professional	
Sales Hub	Enterprise	20 total seats
Reporting Limit Increase	Add-on	1 unit

**Add-ons:** Marketing Contacts: 50,000 | Breeze: 5,000 credits | Core Seats: 8 total seats

## Portal Snapshot

Area	Count	Status
Contact	78,259	Keep in data model
Company	31,671	Keep in data model
Deal	6,577	Keep in data model
Products/Line Items	17	Increase object usage
Invoice	745	Keep in data model
Ticket	0	Evaluate for data model
Quote	3	Evaluate for data model
Marketing Event	0	Evaluate for data model
Calls	12,785	Evaluate expanded use of event tracking
Emails	77,390	Increase event tracking
Meetings	20,650	No action needed, good use of event
Notes	12,478	Improve quality of event tracking
Tasks	3,717	Evaluate expanded use of event tracking
SMS	0	Native activity type not included in marketing subscription
Custom Events	0	Evaluate expanded use of event tracking
Object Properties	1,359	356 with zero fill, 91 stale custom properties
Workflows	315	141 on, 174 off, 74 never enrolled
Segments	351	223 active, 128 static, 56 empty
Forms	167	9,519 submissions (56 zero-submission forms)
Integrations	23	14 keep, 1 remove, 8 review
Users	114 (30 active)	12 super admins, 26 without 2FA

# HubSpot Data System & Governance

## KEY INSIGHTS

**Database Trust Gap:** 78,259 contacts and 31,671 companies carry an estimated 2,000+ and 1,700+ duplicates; recent deal data rates 8/10 while historical contact and company data rates roughly 3/10 after the v2 learner-data migration.

**Property Bloat:** 1,359 object properties with 356 at zero fill and 91 stale custom properties, and average fill rates of just 11% to 18% across Contacts, Companies, and Deals.

**Pipeline Sprawl:** 12 deal pipelines including abandoned per-line-of-business pipelines and a legacy partner-referral opportunity type, with the revenue-critical Delivery motion still tracked manually inside Active Deals.

## Overview

The portal's data model is broad and actively used, but its trustworthiness was compromised by a structural shift rather than by neglect. The v2 scope change moved learner data to Northlane's proprietary learning platform, leaving HubSpot as a client-account-only system and stranding a large volume of stale learner contacts and retired properties. This is the root cause behind the self-rated 3/10 on historical contact and company data, and it is why a reawaken-old-leads play carries real risk today even after prior enrichment.

- **Duplicate Records:** An estimated 2,000+ duplicate contacts and 1,700+ duplicate companies exist with no active deduplication routine in place; determining where duplicates originate is as important as the cleanup itself.
- **Property Hygiene:** 356 of 1,359 properties sit at zero fill and 91 are stale, with fill rates averaging 11.31% on Contacts, 17.88% on Companies, and 11.41% on Deals, evidence of years of accreted fields now cluttering forms and records.
- **Legacy Clutter:** Abandoned per-line-of-business pipelines from the prior leadership era, a never-used "remaining credits" field, and the hidden legacy partner-referral opportunity type still carry legacy revenue and distort the model.

Activity logging is a genuine strength that governance should protect. Meetings (20,650) are used well and are scheduled out to October 2026, and until recently both calls and emails were logged consistently. Notes (12,478), however, are inconsistently associated to contacts and companies, some are missing text entirely, and the manual logging of post-call notes is the VP of Sales' single biggest automation ask.

The pipeline and object model need decisions, not just cleanup. Program deliveries, which are the actual revenue event, are handled manually inside the Active Deals pipeline because the proprietary platform does not sync, and deal and delivery volume is expected to spike in roughly two months. Standing up the parked Delivery pipeline or a dedicated custom object, fed by a

one-way custom-event or webhook push from the platform, is the difference between scalable tracking and a manual breakdown at exactly the wrong time.

Invoices (745) flow correctly today through the ERP-driven finance process, but it's recommended to do a review on the integration to ensure optimal setup. Every deal should have a line item, be syncing over to the ERP, and have a company record associated—most invoices today have no company record associated to the invoice.

## Objects

### Actively Using

Object	Records	Association Labels	Notes
Contact	78,259	Yes	Estimated 2k+ contacts are duplicates; cleanup and analysis recommended. Review association labels—there are 9 between contacts and deals, ensure they are still relevant.
Company	31,671	Yes	Estimated 1,700+ companies are duplicates; cleanup and analysis recommended to understand where duplicates are originating from. Determine what companies are related to establish relational hierarchies.
Deal	6,577	Yes	12 Pipelines. One pipeline has 11 stages, evaluate if “Deals” is the correct tool to track the Delivery Pipeline—potentially evaluate using a custom object to house program deliveries. Using pipeline rules but not currently using deal tags. Determine if historical record is important to continue showing all deal pipelines vs consolidating and archiving unused pipelines.
Invoice	745	No	Actively using invoices. This is due to the integration with the ERP. Recommend a check and review on the ERP integration and configuration with HubSpot.

### Partially Using

Object	Records	Association Labels	Notes
Products/Line Items	17	No	The last Product was created on 9/18/2025. Line items are being used and majority are associated with a product (96% of line items on deals are associated with a product). However, 89% of all deals do not have a line item attached. In looking at the last 180D of created deals, this usage has increased to 18% having line items, but the majority still do not. The Product list should be re-evaluated and line item/product attachment to deals should be formalized into the deal build process.

## Unused Objects

### Explore and Use – Evaluate for Data Model

Object	Records	Association Labels	Notes
Ticket	0	–	Evaluate if there is a use case for Tickets
Quote	3	–	While 3 drafts exist, this is not an in-use object. Quotes are now a part of the Commerce Hub. Evaluate if Northlane needs a CPQ tool and if HubSpot's is a fit.
Marketing Event	0	–	Not currently being used. This object is helpful for tracking offline marketing events, but this can also be captured via HubSpot Campaigns. Evaluate if there is a use case for this object.
Project	0	–	The standard Projects object is robust and built out to track client-focused projects. Evaluate if this is a fit for Northlane's business model.
Services	0	–	The standard Services object is robust and built out to track services-oriented deliverables. Evaluate if this is a fit for Northlane's business model.

### Remove from Data Model

Object	Records	Association Labels	Notes
Contract	0	Yes	While there may be use for a contract custom object, this standard object is read-only and not robust enough.
Order	0	Yes	Northlane will not provide an order-based checkout process, so this object is not needed and should be hidden from the data model.
Subscription	0	–	While there may be use for a subscription custom object, this standard object is read-only and not robust enough to adopt.
Payment	0	–	This requires usage of HubSpot's payment processor and is likely not a fit for Northlane—payments are handled through invoices sent out from the ERP.

## Properties

Object	Total Properties	Custom	Avg Fill Rate	Zero Fill
Contacts	525	172	11.31%	133
Companies	294	32	17.88%	166
Deals	540	124	11.41%	57

Contacts: 133 with zero fill, 49 stale custom properties

Companies: 166 with zero fill, 16 stale custom properties

Deals: 57 with zero fill, 26 stale custom properties

*This property analysis covers Contacts, Companies, and Deals in HubSpot. See the companion Properties Audit workbook for the full breakdown.*

## Events

Activity	Record Count	Recommended Action	Key Findings
Calls	12,785	Evaluate expanded use of event tracking	Calls were a primary tracked activity, but the last call was logged on Dec 3, 2025 (all outbound, with call outcome recorded). The drop-off lines up with outbound moving to an outside sales automation platform; combined with heavy meetings usage, native call logging in HubSpot has been largely superseded. Decide whether to restore native call logging or capture it by integrating the sales platform; existing records stay for history.
Emails	77,390	Increase event tracking	Emails logged consistently through April 20, 2026 (a mix of incoming and outgoing, majority outbound), captured mainly via the email extension and the Tiga AI integration, with a handful logged manually. The falloff since then traces to the team running outbound through an outside sales automation platform, where email and call activity is now recorded instead of syncing back to HubSpot. Connect that platform to HubSpot so activity is captured in the CRM.
Meetings	20,650	No action needed, good use of event	Northlane is actively using the meetings tool. Meetings are prescheduled out to Oct 2026. Great utilization of activity type.
Notes	12,478	Improve quality of event tracking	Notes are being logged, majority of the time on the deal record. Inconsistent association to the contact and company records—best practice is to have every note associated with at least a contact or company record. There are also some note records that are missing text.
Tasks	3,717	Evaluate expanded use of event tracking	Recent usage of tasks (creation and updating) and there is at least one deal, company, or contact associated to each. Some tasks could use a more descriptive task name and description. No task queue usage. Opportunity to evaluate how we can increase task completion, improve processes, and ensure timely follow up.

SMS	0	Not included in subscription	Northlane does not have access to SMS on current subscription. This is specific to HubSpot's SMS tool and does not refer to third-party integrations for tracking SMS activities.
Events	0	Evaluate expanded use of event tracking	The only events being captured are via a third-party integration, Sinch Engage SMS. There are no custom events in use. Custom events can be leveraged to track key activities in outside applications, such as Northlane's proprietary learning platform.

## Segments

Metric	Value
Total Segments	351
Active	223
Static	128
Empty	56
With Descriptions	50 of 351
In Folders	142

Significant opportunity to build a curated library of active, dynamic segments for core audiences (MQL, SQL, Active Customers, At-Risk, Upsell). Database remediation and cleanup for Contacts and Companies is a requirement before segmentation can be utilized (i.e. deduplication, email validation, account re-organization, data model review and buildout).

## Lead Scoring

Metric	Value
Lead Scoring	0 configured
Scoring Model	Not currently using lead scoring. Up to 10 scoring models across companies and contacts that measure fit and engagement levels.
MQL/SQL Thresholds	Not defined – no automatic routing to sales based on score

## Recommendations

<p><b>Priority</b></p> <p><b>High</b> – Critical issue, address first</p> <p><b>Medium</b> – Important, plan for near-term</p> <p><b>Low</b> – Beneficial, schedule when capacity allows</p>	<p><b>Effort</b></p> <p><b>Quick Win</b> – Minimal effort, days not weeks</p> <p><b>Moderate</b> – Requires planning, a few weeks</p> <p><b>Strategic</b> – Major initiative, weeks to months</p>
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## Database Framework & Health

Priority	Recommendation	Effort
High	Validate the existing contact database for deliverability, clearing hard bounces and dead addresses before any reactivation effort given the 3/10 trust rating on historical contacts.	Quick Win
High	Stand up an ongoing deduplication routine for the ~2,000 contact and ~1,700 company duplicates, and trace where they originate (imports, integrations, form fills) so the same drift does not rebuild after cleanup.	Moderate
High	Consolidate the property layer: retire the 133 empty and 49 stale contact fields, 166 empty and 16 stale company fields, and 57 empty and 26 stale deal fields, then thin the low-fill and unused-in-assets properties cluttering records and forms.	Moderate
High	Audit HubSpot's native activity properties and wire them into a single tracking layer so signals like last outreach, last meeting, and next step roll up cleanly to the company and deal level, the foundation for the timing insights leadership asked for.	Moderate
High	Design an attribution model that assigns credit across touchpoints so the team can read full-funnel performance instead of guessing which channels and plays actually drive program deliveries.	Strategic
Medium	Put the incoming intern capacity against backfilling historical learner and credit fields and formally flag pre-2026 deal data as unreliable for velocity and funnel reporting given the earlier stage-skipping.	Moderate

## Data Model Management

Priority	Recommendation	Effort
High	Formalize Products/Line Items on every deal and evaluate dedicated custom objects for program-delivery and subscription tracking. Document the end-state data model and the property schema each object needs, particularly the fields that must map to external systems like the proprietary platform and the ERP.	Strategic
High	Reactivate the parked Delivery pipeline, or stand up a dedicated delivery custom object, so program deliveries (the actual revenue event) are tracked at scale rather than managed by hand inside Active Deals.	Strategic
High	Build a one-way push from the proprietary platform into HubSpot via custom events or webhook to sync deliveries and credits ahead of the deal-volume spike expected in roughly two months.	Strategic
Medium	Review the ERP integration end to end: every deal should carry a line item, sync to the ERP, and associate to a company record. Today most invoices have no company attached, which breaks account-level revenue reporting.	Moderate

<b>Medium</b>	Rationalize the nine contact-to-deal association labels and define parent/child company hierarchies so rollups and account-level reporting reflect real relationships.	<b>Moderate</b>
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## Segments & Lead Scoring

Priority	Recommendation	Effort
<b>High</b>	Convert the 128 static lists to dynamic segments and clear the 56 empty ones so audiences refresh in real time instead of freezing at a point in time.	<b>Moderate</b>
<b>Medium</b>	Impose a folder structure, naming convention, and required descriptions across the 351 segments (only 50 are documented today) so the team can actually find and reuse them.	<b>Quick Win</b>
<b>Medium</b>	Build combined fit-and-engagement scores at the contact and company level, anchored to an ICP analysis of who actually converts, so qualification stops relying on gut feel.	<b>Moderate</b>
<b>Medium</b>	Curate a working library of 8-10 dynamic segments (MQL, SQL, active customer, at-risk, upsell, and credit-depleting Consumption clients) to power email and automation.	<b>Moderate</b>

# Marketing Utilization

## KEY INSIGHTS

**Forms & Campaigns:** 167 forms with 9,519 submissions, 56 zero-submission forms, 118,374 views, 8.04% conversion rate.

**Email & Marketing Tools:** 568 published emails. 20 campaigns. Gaps: Marketing Emails, CTAs, Social, Campaigns, Website pages, Landing pages, Blog, Videos, Podcasts not utilized.

**Untapped or Underutilized Opportunities:** Marketing Emails, CTAs, Social, Campaigns, Blog, Videos, Podcasts represent opportunities to accelerate lead capture and improve multi-touch attribution.

## Overview

Marketing deliberately operates partly outside HubSpot, a workable posture historically but one that leaves attribution and reactivation gaps as the company invests more in demand generation. Learner nurture runs in an outside platform for deliverability and segmentation, ads run in their native platforms, and a single Google Sheet serves as the source of truth across ad channels. The VP of Marketing rates HubSpot comfort a 7/10 and reports strong deliverability, so the gaps here are structural and prioritization-driven, not skill-based.

- **Dormant Channels:** Marketing emails stopped in October 2025 (75% were automated, with no A/B testing or time zone sends), CTAs have not been used since 2024, and social accounts expired in October 2025, a cluster of lapsed tooling worth a root-cause review.
- **Attribution Gap:** Only 20 campaigns exist with just one created in the past year, minimal assets, and no cost data, which severely limits the multi-touch attribution both the VP of Sales and the VP of Marketing want.
- **Forms Strength:** 167 forms have driven 9,519 submissions at an 8.04% conversion rate, though 56 forms have zero submissions and should be pruned.

Two blockers deserve immediate attention. The account holds 187 landing pages against a 30-page subscription limit, meaning 157 must be deleted before any current page can be published or updated; these pages are still live but have not been touched since 2024. Separately, the Ads connector is only partially implemented: Google Ads and LinkedIn are connected as ad accounts, but LinkedIn is disconnected and no Paid Search ad groups appear, which forfeits the cleanest ROI reporting HubSpot offers given that LinkedIn and paid search are core channels.

The clearest forward opportunity aligns with the VP of Marketing's own priority. His first-choice initiative is a campaign targeting website visitors who match the ICP, and with RB2B already installed for visitor identification, this becomes achievable once campaign metadata and UTM discipline are in place.

This is primarily a CRM audit – the marketing review below is a general inventory of tool usage.

## Marketing Tools

Tool	In Use?	Summary
Marketing Emails	No	At one point, marketing emails were in use. The last marketing email was sent in October 2025. 75% of marketing emails sent were automated. There was no use of A/B testing or time zone sends. Evaluate what caused Marketing Email activity to stop.
Forms	Yes	Forms are actively used and are the strongest lead-capture channel: 167 forms have driven 9,519 submissions across 118,374 views at an 8.04% conversion rate. That said, 56 forms (34%) have zero submissions and 162 have had none in over a year, and only 1 form is linked to a campaign, so pruning the dead forms and connecting the rest to campaigns would tighten attribution.
CTAs	No	Have not used since 2024
Social	No	Have not used since Oct 2025. Four social media accounts have once been connected but have since expired.
Campaigns	No	Thin usage of campaigns. Only one campaign created in the last year. Minimal assets added to each campaign, no spend incorporated. This greatly limits attribution tracking/reporting.
Ads	Yes	Google Ads and LinkedIn have been connected as ad accounts to HubSpot. No ad groups showing for Paid Search, and the LinkedIn account is currently disconnected. This ads connector should be more fully implemented, since it is the truest ROI report you'll get in HubSpot.
Website pages	No	Test page is only draft in HubSpot
Landing pages	No	They have 187 landing pages, but are only allowed 30, and need to delete 157 to be able to publish or update any of their current pages. This is probably due to HubSpot subscription changes over the years. These pages have not been created or updated since 2024. These pages are still live.
Blog	No	There is a blog on their website, but it is not hosted on HubSpot. Still should set up an RSS email feed in HubSpot.
Videos	No	Not included with subscription
Podcasts	No	Not included with subscription

## Recommendations

### Marketing Hub Utilization

Priority	Recommendation	Effort
High	Deploy CTAs across the website and highest-traffic content to lift capture and give conversion tracking something to measure; CTAs have sat unused since 2024.	Quick Win
High	Reconnect the four expired social accounts to restart engagement tracking and campaign syncing.	Quick Win
High	Fully implement the Ads connector by reconnecting the disconnected LinkedIn account and configuring Paid Search ad groups, so Google, LinkedIn, and paid search spend reports true ROI, the cleanest attribution HubSpot offers for the paid channels that matter here.	Quick Win
High	Work through all 167 forms: retire the 56 with zero submissions and the 162 dormant over a year, then connect the survivors to campaigns (only one is today) to tighten attribution.	Moderate
High	Delete 157 of the 187 landing pages to drop back under the 30-page cap; until that happens, no existing live page can be published or updated.	Moderate
Medium	Standardize a UTM tagging scheme and enforce it at the source so multi-touch attribution has clean inputs.	Quick Win
Medium	Require complete campaign metadata (name, type, budget, audience, status, dates) so campaigns become reportable units rather than empty shells.	Moderate
Medium	Archive the dormant landing pages and concentrate effort on the handful of campaigns actually driving traffic and conversions.	Moderate
Medium	Diagnose why marketing email stopped in October 2025 and resolve the deliverability and landing-page issues flagged as the top marketing fixes before restarting sends.	Moderate
Medium	Launch the ICP website-visitor campaign using the already-installed RB2B identification, the VP of Marketing's stated first priority, once campaign and UTM structure are in place.	Moderate
Low	Wire an RSS-to-email feed for the externally hosted blog so existing content feeds nurture without migrating the blog into HubSpot.	Quick Win

# HubSpot Automation & Process

## KEY INSIGHTS

**Workflow Status:** 141 workflows active, 174 inactive, 74 never enrolled contacts. Most lack clear purpose documentation.

**Workflow Purpose Breakdown:** 163 Other, 120 Email/Nurture, 17 Unknown, 8 Notification, other purposes underutilized.

**CRM Customization & Integrations:** 1 integration to remove, 8 to review, security and data quality risks to address.

**User Access & Governance:** 30 of 114 user records are active (83 deactivated, retained for history). Among active users: 26 not on a team, 18 without a permission set, 1 inactive >90 days. Seat utilization: Sales Enterprise 16/20 (80%), Core 6/8 (75%), Developer (2), Partner (6).

## Overview

The automation footprint tells a story of capability built and then left idle. The portal contains 315 workflows (141 active, 174 off, 74 never enrolled) and 156 sequences that stopped running in September 2025, despite a Sales Enterprise subscription that makes sequences a core, paid-for tool. Most workflows lack purpose documentation, so the first step is an audit that separates what should run from what should be archived.

User governance is where record and tool sprawl has outpaced structure. The portal holds 114 user records accumulated over the years, of which only 30 are active today: 83 are deactivated (and fine to keep for history) and one invite is pending. Among the 30 active users there are 12 super admins, 26 without 2FA, and only 1 inactive more than 90 days. Seats sit within subscription at 80% for Sales Enterprise and 75% for Core, so the constraint here is governance and hygiene, not capacity.

- **Security Exposure:** 26 active users without 2FA, including 7 super admin, alongside 12 total super admins across a lean, focused team, is a material risk that should be closed immediately.
- **Cost Discipline:** Seats are within subscription, so there is no seat over-allocation to unwind. Software and subscription spend sits comfortably within budget; the only seat worth reclaiming is one active paid seat (one core-seat user) idle for 305 days.
- **Access Hygiene:** Among the 30 active users, 26 sit on no team and 18 have no permission set, a legacy of the pre-2026 period when everyone was a super admin and deal stages could be skipped.

The automation roadmap is well-defined by leadership and should drive prioritization. The VP of Sales' top ask is eliminating manual post-call notetaking and property population, followed by

automated next-step and closed-lost follow-up timing. The RevOps lead’s wish list centers on a revenue command center: forecasting, pipeline hygiene checks, credit tracking, weekly revenue reporting, and deal-risk flagging that surface what is real, what is at risk, and what changed this week without manual interpretation.

A high-value, business-specific automation is credit depletion tracking for Consumption clients, which is entirely manual today (the VP of Sales asks the RevOps lead how many credits remain) and represents a clear upsell trigger. The Access model carries a related visibility gap, exemplified by a subscription client adding roughly 12 seats without Northlane’s knowledge. On customization and integrations, the deal record is highly tailored with conditional logic while Companies and Contacts were last updated in December 2024, and integration governance is overdue: Zoom is disconnected and slated for removal, while eight integrations, including two Platform Sync apps, n8n, RB2B, and Google Sheets, have unclear ownership and should be evaluated.

## Workflows

Metric	Value
Total Workflows	315
Active (On)	141
Inactive (Off)	174
Never Enrolled	74
Issues (Last 30 Days)	17

See companion Workflows spreadsheet for detailed analysis including creation dates, triggers, and actions.

## Sequences

**156 sequences built** — Sequences were in active use until September 2025, when outreach shifted to an outside sales automation platform. With a Sales Enterprise subscription already paying for this capability, consolidating that motion back into HubSpot is a key opportunity. Done appropriately, sequences can also be sent via HubSpot workflows, utilizing end-to-end personalized 1:1 automation.

## Users

Metric	Value
Total Users	114
Super Admins	12
Without 2FA	37 (26 active without 2FA)
On a Team	28 of 30 unassigned (active users only)

Has Permission Set	18 of 30 (active users only)
Inactive >90 Days	1 user (one core-seat user)

## Seat Utilization vs. Subscription

Seat Type	Assigned	Allotted	Utilization
Sales Enterprise	16	20	80%
Core Seats	6	8	75%
Developer	2	—	—
Partner (free/external)	6	—	—

**Team breakdown (active users):** Sales (4). The other 28 of 30 active users have no team assignment. Across all 114 records, including deactivated, historical teams were Sales (6), Business Development (5), Facilitators (3), and Curriculum (1).

**Permission sets (active users):** Super admin (12). 18 of 30 active users have no permission set.

**Domain breakdown (all 114 records, including deactivated):** primary company domain (59) | typo variant of company domain (1) | investor/partner firm domain (16) | personal email providers, e.g. Gmail/Ymail/Hotmail (18) | university domains (8) | consultant, contractor, and vendor domains (12).

## Inactive & Deactivated Users (>90 Days)

Of the 114 records, 83 are deactivated and retained for historical record. They consume no seats and require no action. Only one active user (a single core seat, 305 days since last login) is a genuine seat-reclaim candidate. The table below lists deactivated and inactive users for reference.

Name	Last Login	Seat Type	Status	Days Inactive
Former User 01	2025-09-04	sales-enterprise	Deactivated	305
Former User 02	2025-07-28	view-only	Deactivated	343
Former User 03	2025-08-03	core	Deactivated	337
Former User 04	2025-10-14	partner	Deactivated	265
Active User (idle core seat)	2025-09-05	core	Active	304
Former User 05	2025-08-22	core	Deactivated	318
Former User 06	2025-09-09	core	Deactivated	300
Former User 07	2025-12-17	view-only	Deactivated	201
Former User 08	2025-12-15	view-only	Deactivated	203

Former User 09	2025-09-17	partner	Deactivated	292
Former User 10	2025-07-25	core	Deactivated	346
Former User 11	2026-01-09	sales-enterprise	Deactivated	178
Former User 12	2025-09-03	core	Deactivated	306
Former User 13	2025-07-29	view-only	Deactivated	342
Former User 14	2025-10-13	sales-enterprise	Deactivated	266
Former User 15	2026-04-03	developer	Deactivated	94
Former User 16	2025-07-15	core	Deactivated	356
Former User 17	2025-10-30	sales-enterprise	Deactivated	249
Former User 18	2025-08-20	core	Deactivated	320
Former User 19	2025-09-16	partner	Deactivated	293
Former User 20	2025-07-21	core	Deactivated	350
Former User 21	2025-08-11	core	Deactivated	329
Former User 22	2025-08-29	core	Deactivated	311
Former User 23	2025-09-02	core	Deactivated	307

## CRM Customization

Metric	Value
CRM Layouts	64% utilized (7 of 11 options)
Custom Fields	Significant unused custom properties across all objects
Create Forms	Not fully implemented for all object types
Index View Customization	Limited – opportunity for better record previews

## Integrations

Category	Count	Action
Total Integrations	23	See breakdown below
Keep (Active & Recommended)	14	Well-integrated, stable, actively used
Remove (Unused/Risky)	1	Cleanup recommended to reduce security/data risk
Review (Evaluate Relevance)	8	Assess continued business value before archiving

## Recommended for Removal

App Name	Purpose	Status
Zoom	Webinars / Virtual Events	Disconnected

## Recommended for Review

App Name	Purpose	Status
Calendly	Calendar / Personal Email Integration	Connected
Config Sheet Connector	Unknown	Connected
Google Sheets	Spreadsheets	Connected
n8n	Unknown	Connected
RB2B For Marketing	Unknown	Connected
Sendspark	Advertising / Paid Media	Connected
Platform Sync	Unknown	Connected
Platform Sync (V2)	Unknown	Connected

## Recommendations

### Workflows & Sequences

Priority	Recommendation	Effort
High	Reactivate the 156 dormant sequences already funded by the Sales Enterprise subscription, leading with the highest-value re-engagement and follow-up plays.	Quick Win
High	Run a full workflow audit across the 315 workflows: archive the 174 off and 74 never-enrolled, and document each of the 141 active flows with a clear purpose and owner.	Moderate
High	Automate post-call notetaking and property population using the existing AI notetaker stack to remove the VP of Sales' single biggest manual burden.	Strategic
High	Rebuild the priority workflows (lead nurture, client onboarding, deal progression) around how the focused team actually operates today rather than the legacy sprawl that accumulated over time.	Strategic
Medium	Set naming and documentation standards and apply them so every workflow's purpose and object type are legible at a glance.	Quick Win
Medium	Automate closed-lost follow-up timing and next-step task creation so the lean team is prompted at the right moment without tracking it by hand.	Moderate

## Pipeline & Deal Management

Priority	Recommendation	Effort
High	Enforce required deal properties at creation (an automated deal-build can handle this) so pipeline data is complete from the first stage.	Quick Win
High	Tighten deal stages and codify entry and exit criteria for each so stage movement is consistent and reportable.	Moderate
Medium	Customize board views to surface the metrics that matter (amount, stage, days in stage, deal tags) at a glance.	Quick Win
Medium	Trigger stage-based automations that update properties and fire the right actions as deals advance.	Moderate
Low	Reset stage probabilities to improve forecast visibility, accepting that the short deal cycle keeps forecasting directional.	Quick Win

## Reporting

Priority	Recommendation	Effort
High	Build a revenue command-center reporting layer that surfaces forecast likelihood, deal risk, pipeline hygiene, and credit tracking gaps (the RevOps lead's core ask) without manual weekly interpretation.	Strategic
Medium	Stand up workflow and sequence performance dashboards tracking enrollment, conversion, and engagement so automation is measured, not assumed.	Moderate

## CRM Customization & Integrations

Priority	Recommendation	Effort
High	Remove the disconnected Zoom integration to close an unnecessary access point.	Quick Win
High	Review the eight integrations with unclear ownership (including the two proprietary-platform connectors, n8n, RB2B, and Google Sheets) and confirm each still earns its place.	Quick Win
High	Implement Consumption credit-depletion tracking that auto-triggers re-up and upsell alerts, replacing today's manual credit counts done by asking the RevOps lead.	Strategic
Medium	Reprioritize record layouts around high-impact properties to speed data entry and cut noise.	Quick Win
Medium	Turn on index-page record previews for faster contact, company, and deal lookups.	Quick Win
Medium	Add create forms per object to standardize entry and enforce required fields at the point of creation.	Quick Win
Medium	Build seat-visibility tracking for Access (subscription) clients to close the gap that let a subscription client add roughly 12 users without the company's knowledge.	Moderate
Low	Document each integration's purpose, owner, and health so the stack stays accountable.	Moderate

## User Access & Security

Priority	Recommendation	Effort
High	Turn on 2FA for the 26 active users still without it, 7 of whom hold super-admin rights.	Quick Win
High	Place the 28 unassigned active users onto teams and give the 18 without a permission set an appropriate role.	Quick Win
Medium	Reclaim the single idle paid seat: one core-seat user inactive for 305 days. Every other dormant account is already deactivated and fine to keep for the record.	Quick Win
Low	Bring the active super-admin count down from 12 to between 3 - 5 and move everyone else onto role-based permission sets.	Quick Win