Thalox

HEALTH CHECK · AUGUST 2026

HubSpot Health Check

A full audit of data quality, pipeline, lifecycle, ownership and attribution — with the fixes that matter first.

INTERNAL PORTAL AUDIT

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- Data Quality & Hygiene
- Deal Pipeline & Revenue
- Lead Management
- Ownership & Service
- Marketing & Attribution
- Governance & Scope
- Service & Revenue Integrity

Executive Summary — What We Found

AT A GLANCE

32
findings across
6 audit areas

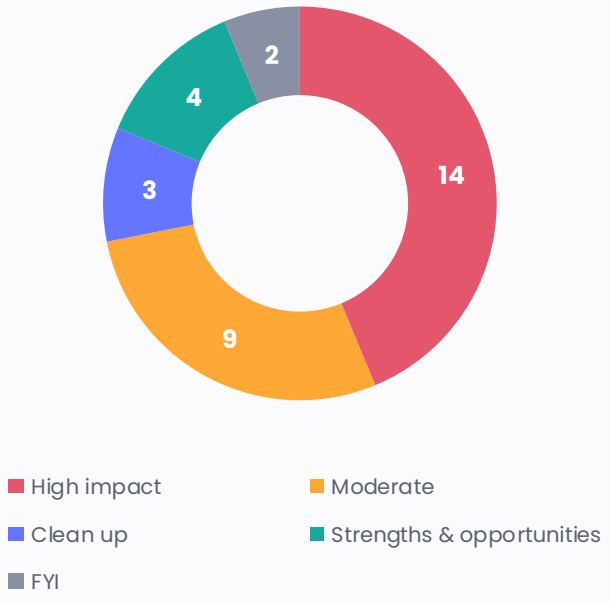
14
high-impact issues
to fix first

18,600+
records & activities
reviewed

Top five priorities

1. **Fix ticket ownership**
   293 of 324 tickets (90.4%) have no owner — service accountability is broken.
2. **Reconnect companies to contacts**
   1,769 companies (33.2%) have no associated contact — blocks account reporting.
3. **Fix campaign attribution**
   95.1% of contacts show no campaign influence; ad and content spend can't be judged.
4. **Clean up formatting & duplicates**
   49% of contacts have a location formatting issue; 323 duplicates flagged.
5. **Close the MQL → SQL gap**
   Only 2.3% of contacts ever reach SQL despite 1,730 sitting at MQL.

Findings by severity



Thalox Data Model Overview — Records Audited

Every object below was queried live in portal 25769372. Roughly 18,600 records and activities in total.

CRM objects

4,372
Contacts

5,331
Companies

223
Deals

Service & activity

324
Tickets

1,130
Tasks

2,637
Meetings

Sales engagement

3,077
Sales emails sent

121
Calls

3
Quotes

Data Model Overview — Portal Snapshot

PORTAL VIEW

Live object counts, straight from the portal

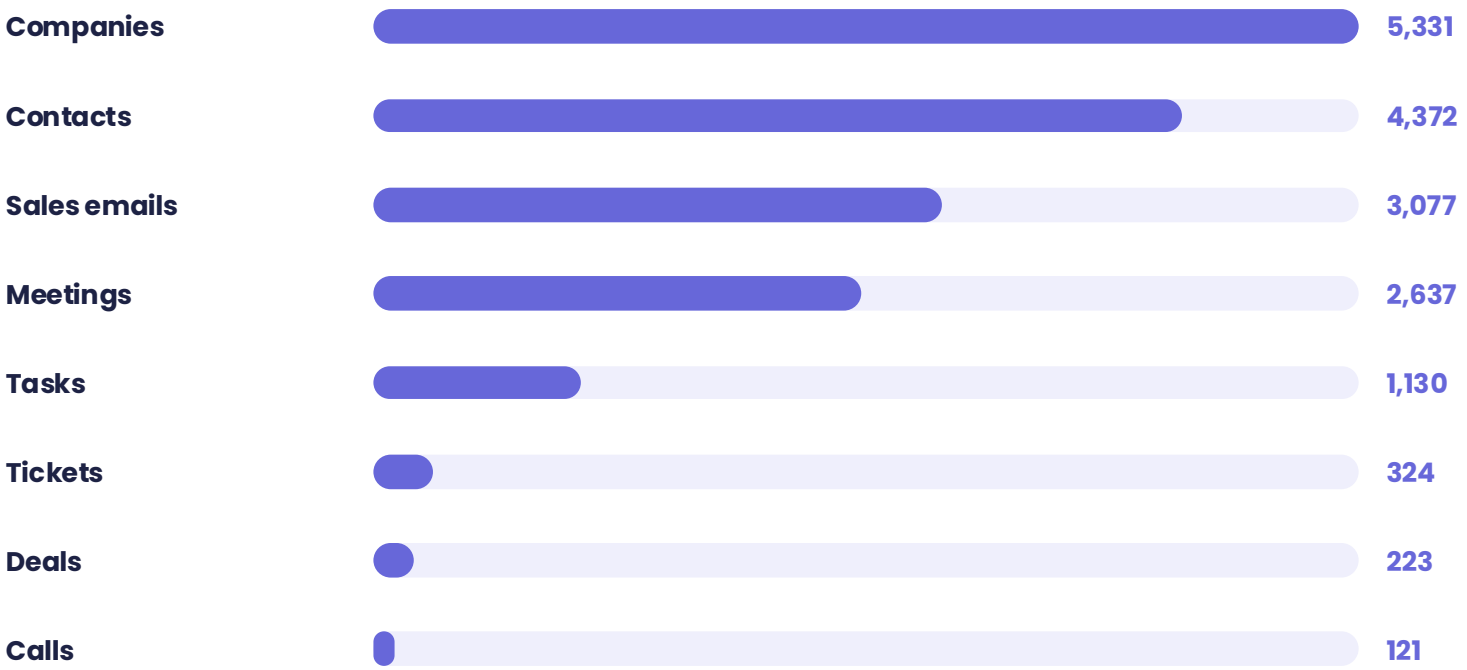
What to look for

- Companies (5,331) and contacts (4,372) dwarf every other object — data quality issues there scale fastest.
- Deals (223) are small in number relative to contacts, so each unlinked deal costs more.
- Activity volume (1,130 tasks, 2,637 meetings, 3,077 sales emails) confirms the portal is actively used, not dormant.

TAKEAWAY

Contacts and companies are the highest-leverage place to fix data quality.

Object volume at a glance — records per object type



Portal 25769372 — object counts as queried in August 2026.

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01

Data Quality & CRM Hygiene

Contacts · Companies · Deals · Properties · Duplicates

10.6%
contacts with no primary company

79.6%
properties never used

323
duplicate records

Data Quality — Duplicates & Formatting

PORTAL VIEW

Duplicate and formatting summary

What to look for

- 323 duplicates flagged — 210 contact, 113 company.
- 2,405 formatting issues, dominated by missing contact location (2,163).
- Enrichment last ran 11 months ago; contact match rate is only 35% vs. 93% for companies.

TAKEAWAY

2,163 contacts (49.0%) have a location formatting issue because the value is empty.

Duplicates & formatting — the real numbers

323	2,405	49.0%
duplicates flagged	formatting issues	contacts with a location issue

BREAKDOWN

Contact duplicates	210
Company duplicates	113
Location formatting issues	2,163
Name formatting issues	242

Native summary — duplicates, formatting and enrichment gaps, portal 25769372.

Data Quality — Contacts & Companies

HIGH IMPACT

464 contacts lack a primary company

10.6%

10.6% of 4,372 contacts have no associated company record, so account-level reporting and routing are incomplete.

View segment in HubSpot →

Recommendations

- Match by email domain to bulk-associate.
- Run a HubSpot Data Enrichment or bulk pass (ZoomInfo, Clearbit, Apollo).
- Make the field mandatory on contact creation.
- Identify the sources feeding unassigned contacts.

HIGH IMPACT

1,769 companies have no contact

33.2%

33.2% of the 5,331 company records have no contact attached — mostly imported or enriched shells rather than real accounts.

View segment in HubSpot →

Recommendations

- Link by email-domain match first.
- Enrich the accounts worth keeping to find contacts.
- Archive companies with no contact, deal or activity.

OPPORTUNITY

21 companies with 5+ contacts

0.39%

0.39% of companies show real account depth — these could indicate key accounts.

Recommendations

- Tag them for account-based marketing where no deal already exists.
- Use labels to correctly identify the different roles of these contacts.

Data Quality — Contacts & Companies

HIGH IMPACT

46 deals lack a contact

20.6%

46 of 223 deals aren't linked to a contact, making sales activity and follow-up hard to track.

Recommendations

- Make contact mapping mandatory for deals.
- Run a workflow to match unassigned deals to contacts on email domain, company name or deal owner, then link the remainder manually.

MODERATE

21 orphan deals, with no company association

9.4%

21 of 223 deals have no company association. Every deal should carry at least a company link as a baseline.

Recommendations

- Make contact and company mapping mandatory for deals.

MODERATE

440 contacts use free email

10.1%

440 contacts (10.1%) use personal domains such as Gmail or Yahoo, which weakens firmographic enrichment and scoring.

View segment in HubSpot →

Recommendations

- Create a property and tag contacts, e.g. email_type = free_domain.
- Implement an email verification process (e.g. Clay).
- Configure forms to block free email addresses for B2B use cases.

Data Quality — Properties, Duplicates & Deliverability

HIGH IMPACT

824 properties — 656 unused

79.6%

656 of 824 properties have never been used in any tool, and a further 200 hold no data on any record. 6 are flagged as exact duplicates.

Recommendations

- Archive properties unused for 12+ months.
- Confirm the remainder with each team before deleting.
- Run the cleanup as one batch pass in property settings.

HIGH IMPACT

323 duplicates, 2,405 formatting issues

49.0%

210 contact and 113 company duplicates (323 total), most matching at 85–98% similarity. Formatting is dominated by missing Location on 2,163 contacts (49.0%), plus 242 name issues.

Recommendations

- Clear the 95%+ duplicate matches first.
- Set formatting rules to auto-correct Location on import.
- Fix the 242 name-format issues in bulk.

MODERATE

171 contacts have bounced

3.9%

3.9% of the database has bounced, based on the Marketing emails bounced property — a direct drag on sender reputation.

View segment in HubSpot →

Recommendations

- Suppress permanently from all sends.
- Add email validation on every form.
- Block disposable domains at the point of entry.

HIGH IMPACT

2,369 records have enrichment waiting

93% company match rate

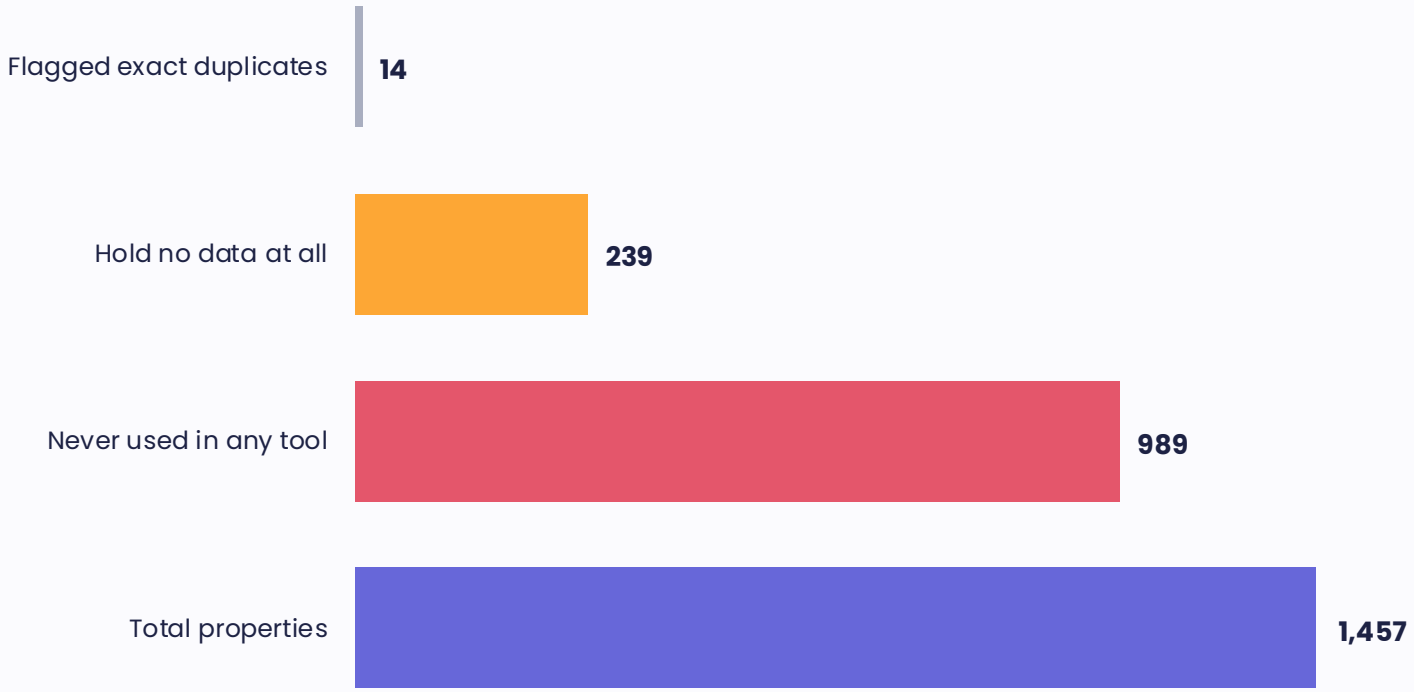
The last coverage scan ran on 8 Sep 2025, about 11 months ago. Of the records analysed, 2,832 of 3,031 companies (93%) and 1,177 of 3,347 contacts (35%) have enrichment available. Enrichment has already touched 15 closed-won deals and 93 qualified leads.

Recommendations

- Run a fresh scan — HubSpot allows one roughly every two weeks.
- Enable automatic enrichment on contact and company creation.
- Start with companies — the enrichment match rate there is far higher than for contacts.
- Expect less from contacts; the 35% match still reflects many personal-domain addresses.

824 properties — only a fraction carry data

More than half your properties have never been touched by any tool. Archiving them is the single fastest cleanup win in the portal.



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02

Deal Pipeline & Revenue

Stalled Deals · Closed Lost · Pipelines

40%
open deals stalled

96.7%
no Closed Lost reason

40
open deals total

Deal Pipeline — All Deals & Stage Structure

PORTAL VIEW

The real deal list: 223 records

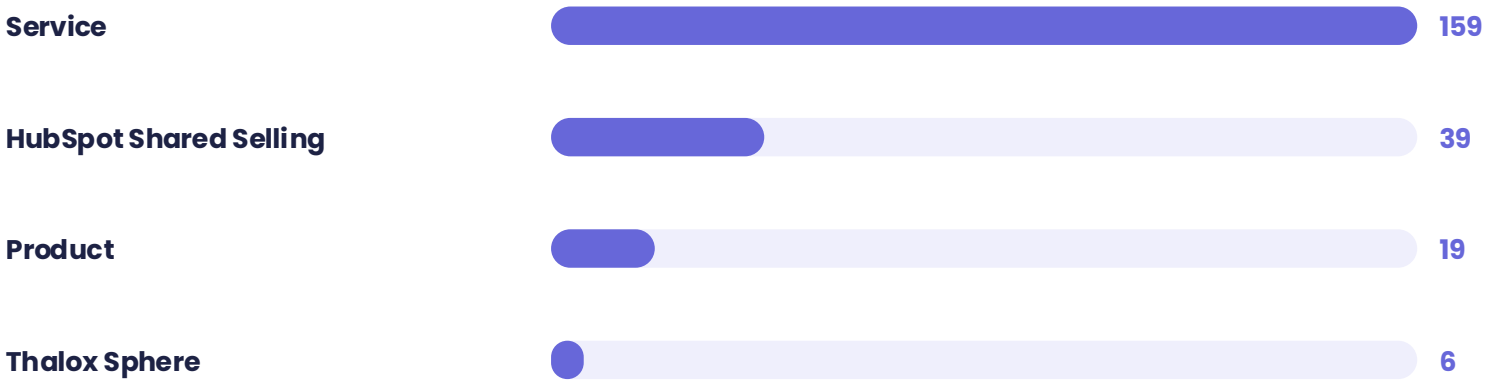
What to look for

- Deals are split across 4 pipelines: Service (159), HubSpot Shared Selling (39), Product (19) and Thalox Sphere (6).
- Service is the largest pipeline by value at roughly €2,038,445 across 159 deals.
- 40 deals remain open; 91 are Closed Won and 92 are Closed Lost.
- 16 of the 40 open deals (40%) have had no activity for 60+ days.

TAKEAWAY

Your deal volume is concentrated in the Service Sales Pipeline

Deals by pipeline



40	91	92
Open deals	Closed Won	Closed Lost

All deals view, portal 25769372 — 223 records across 4 pipelines, deal stage, amount, close date and owner.

Deal Pipeline — Stalled Deals & Pipeline Health

HIGH IMPACT

16 of 40 open deals stalled
Stalled deals span all 4 pipelines

40%

40% of open deals have had no activity for 60+ days and none are marked Closed Lost or Won. Most sit in the early stages of their pipeline, putting the open pipeline at risk of stalling out entirely.

Recommendations

- Automate inactivity alerts at 14 / 30 / 45 / 60 days.
- Force a stage decision or Closed Lost at 60 days.
- Review stalled deals in the weekly pipeline meeting.

HIGH IMPACT

89 of 92 Closed Lost deals lack a reason

96.7%

96.7% have no Closed Lost reason recorded.

Recommendations

- Make the reason required on the Closed Lost stage.
- Use a dropdown rather than free text for reliable reporting.
- Backfill the largest lost deals from rep notes.

STRENGTH

4 pipelines — well within limits

4 pipelines

Service (159 deals), HubSpot Shared Selling (39), Product (19) and Thalox Sphere (6).

Recommendations

- No consolidation needed on count alone.

Deal Pipeline — Where the Pipeline Leaks

HIGH IMPACT

46 deals lack a contact link

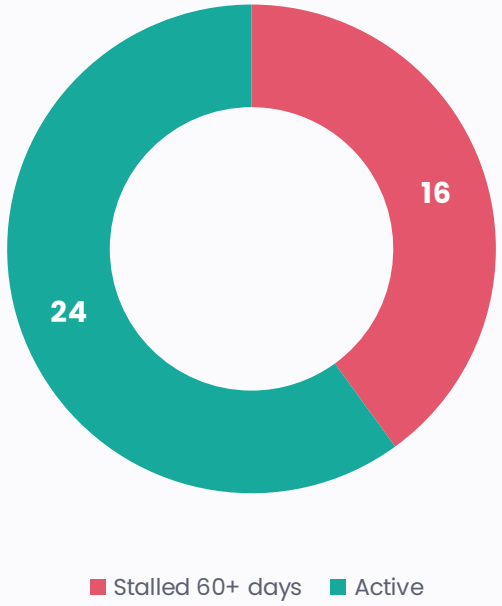
20.6%

20.6% of deals have no contact attached. Beyond the data-quality impact, this limits pipeline reporting and follow-up by contact.

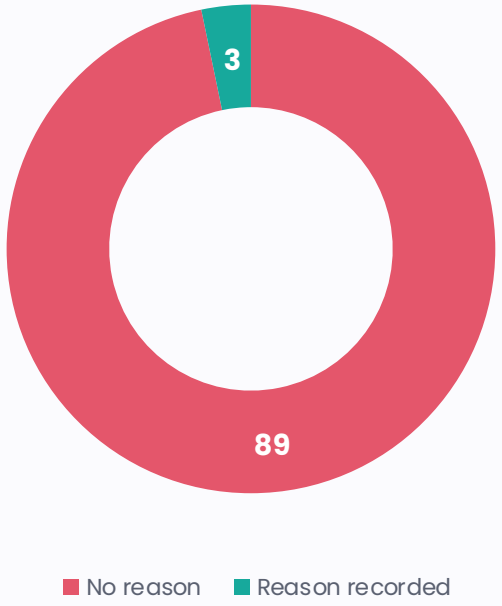
Recommendations

- See the Data Quality section for the fix.
- Bulk-link by email domain, then enforce on creation.

Open deals — activity in last 60 days



Closed Lost — reason recorded



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03

Lead Management & Lifecycle

Lifecycle Stage · MQL / SQL · Lead Scoring

17x
MQL to SQL drop-off

1,730
contacts ever reached MQL

102
contacts ever reached SQL

Lead Management — Lifecycle Stage Distribution

PORTAL VIEW

Standard stages, empty middle

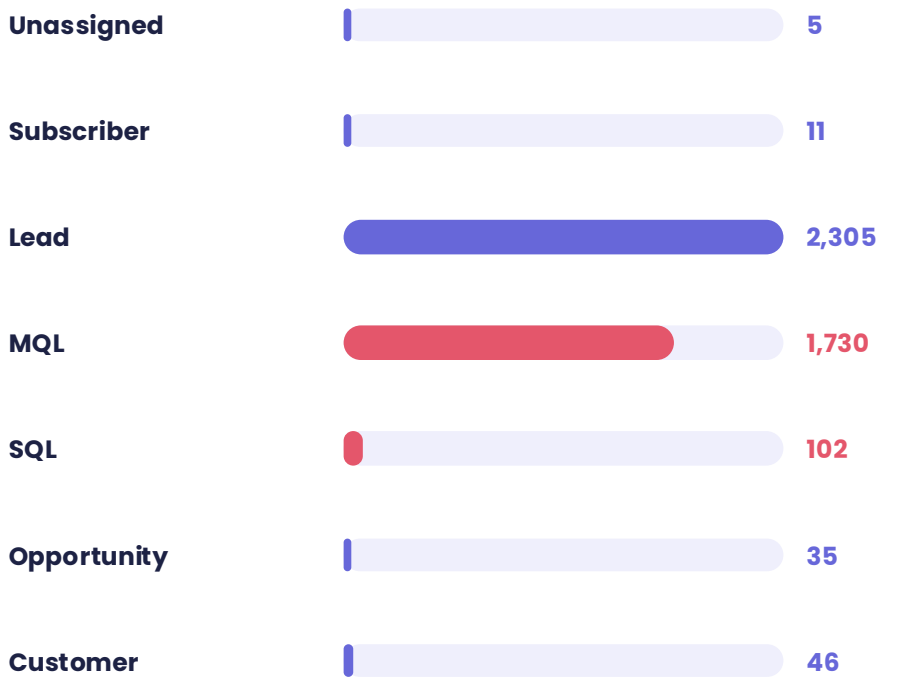
What to look for

- HubSpot's default stages are in use, in order, with no custom stages inserted.
- Lead alone holds 2,305 contacts — 52.7% of the whole database.
- MQL holds 1,730 and SQL just 102, while Customer holds 46.
- 4,372 of 4,372 contacts carry a stage, so coverage is complete.

TAKEAWAY

1,730 contacts sit at MQL, but only 102 ever reach SQL.

Contacts by lifecycle stage



17x drop from MQL (1,730) to SQL (102).

Lifecycle Stage property options and record counts, portal 25769372.

Lead Management — Lifecycle & Scoring

HIGH IMPACT

SQL is barely reached

2.3% of contacts reach SQL

1,730 contacts sit at MQL, but only 102 (2.3% of all contacts) ever reach SQL — and just 35 Opportunities and 46 Customers follow. The SQL gate is where the funnel truly narrows.

Recommendations

- Investigate why MQL contacts stall before reaching SQL.
- Decide whether the SQL gate reflects real qualification criteria.
- If they stay, agree entry criteria and enforce them in automation.

STRENGTH

Lifecycle uses the standard model

6 standard stages in use

Subscriber → Lead → MQL → SQL → Opportunity → Customer: HubSpot's default set, in order, with no custom stages inserted. 4,372 of 4,372 contacts carry a stage.

Recommendations

- Keep the standard set as the customer base grows.
- Route customer-success phases to a separate property.

MODERATE

882 contacts lack a recorded Lead Source

20%

One in 5 contacts has no recorded source, so channel performance can't be measured or compared.

Recommendations

- Make Lead Source mandatory on manual entry, import and API.
- Populate once on first touch and never overwrite.
- Backfill from original form or UTM data.

Thalox Lead Management — Where Leads Stop Moving

The stages are HubSpot's standard set and coverage is complete. The problem is the middle: 1,730 MQLs but only 102 ever reach SQL.

17x

drop-off between MQL and SQL

1,730 contacts sit at MQL but only 102 ever reach SQL. Qualification, not volume, is where the funnel stops.

81

reach Opportunity or Customer combined

35 Opportunities and 46 Customers combined — a thin commercial tail even relative to the 102 that reach SQL.

How to fix the middle

Find why MQL stalls

Trace what happens to the 1,730 MQLs that never advance to SQL.

Test the SQL bar

102 of 1,730 MQLs (5.9%) ever reach SQL — check if the bar is set too high.

Score the 2,305 Leads

Leads are 52.7% of the database; rank them before qualifying for MQL.

Define SQL entry

Agree the criteria for SQL, then enforce them in automation.

Lead Scoring — What's In Use, What's Not

CHECK LOGIC

Lead Scoring

What to look for

- 4 of 5 allowed scores exist. Only "Potential Partner Implicit" is fully ON; one more is live with unpublished draft changes.
- 56.5% of contacts (2,466 of 4,362) carry a score, but only 2.2% of contacts created in the last 12 months do — scoring has stalled on new leads.
- The Explicit score doesn't track qualification: SQL contacts average 5.7, lower than Leads (8.0) and MQLs (8.8).

TAKEAWAY

Scoring has stalled on new leads, and no company-level score exists — treat it as broken, not just imperfect.

Lead Scoring — 4 scores built, 1 fully active

2,466

contacts carry a lead score (56.5%)

2.2%

of contacts created in the last 12 months are scored (42 of 1,938)

4 of 5

scores created on this plan; only 1 is fully ON

SCORES IN THE ACCOUNT

Potential Partner Implicit — Engagement, 2 properties	ON
Combined score, Fit type — created Dec 2025, 1 property	ON, DRAFT CHANGES
Combined score, Combined type — created Mar 2026, 0 properties	OFF
HubSpot Score Implicit — legacy Engagement score, 0 properties	OFF

Native summary — Lead Scoring app, portal 25769372.

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04

Ownership, Tasks & Service

Contacts · Companies · Tasks · Tickets · Target Accounts

7.8%
of contacts have no owner

6.8x
Unassigned vs largest owner

2,318
largest single owner book

Ownership — Contact Owner Distribution

PORTAL VIEW

One owner holds most of the book

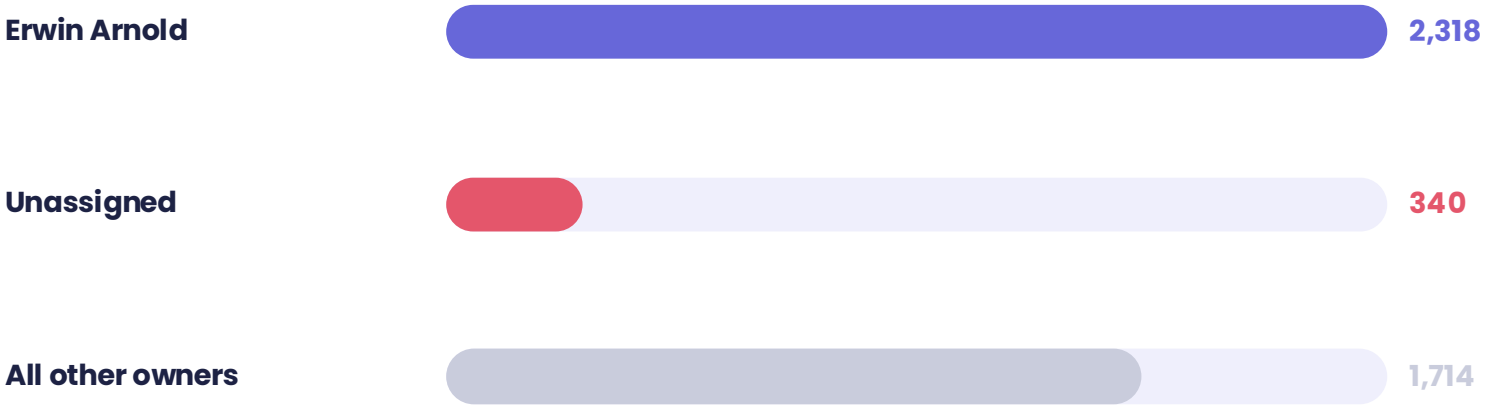
What to look for

- Unassigned holds 340 contacts — 7.8% of the database, versus 6.8x that many in the largest real owner.
- The biggest individual book is Erwin Arnold with 2,318 contacts (53%); the tail falls away sharply after that.
- Ownership concentration is a single-point-of-failure risk if that owner leaves or is reassigned.
- Assigning owners is a prerequisite for any routing, SLA or activity reporting.

TAKEAWAY

340 contacts belong to nobody — a small but real accountability gap.

Contacts per owner (top owners)



Erwin Arnold alone holds 53% of all contacts — 6.8x the size of the Unassigned bucket (340, 7.8%). The remaining owners share the rest.

Count of contacts per owner, all time — portal 25769372.

Ownership — Contacts, Companies & Tasks

MODERATE

340 contacts have no owner

7.8%

7.8% of the contact database has no assigned owner — 6.8 times smaller than the largest individual owner's book (Erwin Arnold, 2,318). Nobody is accountable for follow-up on those records.

Recommendations

- Auto-assign an owner on contact creation, round-robin or criteria-based.
- Backfill the 340 in batches by source, region or email domain.
- Report on unowned contacts weekly until the number falls.

MODERATE

671 companies have no owner

12.6%

12.6% of the 5,331 company records have no owner assigned — a higher rate than contacts at 7.8%. Without an owner at account level, territory reporting, routing and account coverage all break down.

Recommendations

- Apply the same auto-assignment logic used for contacts.
- Assign by territory where Country/Region data is available.
- Prioritise the 21 companies that already have 5+ contacts.
- Review owners holding fewer than 5 records for relevance.

CLEAN UP

346 open tasks, 45 unassigned

45 unassigned

Only 45 of 346 open tasks are unassigned — a solid result relative to contacts and companies.

Recommendations

- Sort by due date in Tasks and clear anything no longer relevant.
- Confirm a process for assigning new tasks to a named rep.

Ownership — Tickets, Target Accounts & Seats

HIGH IMPACT

293 of 324 tickets have no owner

90.4% of tickets unowned

90.4% of tickets have no owner assigned. Worth splitting open from closed — an unowned open ticket is a live service risk.

Recommendations

- Automate assignment on form submission and set a default priority.
- Check how many of the 293 are still open and clear those first.
- Define SLA reporting on the ticket pipeline.

OPPORTUNITY

7 target accounts, only 1 tiered

6/7 accounts untiered

Only 7 of 5,331 companies are flagged as target accounts. Just 1 (Grover) carries a Tier. Deals are concentrated in two accounts — CERATIZIT (13 deals) and Centro Cultural de Belém (7 deals). Meanwhile 21 companies already have 5+ contacts.

Recommendations

- Map buying roles and a decision maker on each of the 7.
- Populate Tier 1 / 2 / 3 on the remaining 6 accounts.
- Expand the list from the 21 companies with 5+ contacts.
- Track progress with the built-in No decision maker and No activities views.

CLEAN UP

19 of 29 HubSpot user seats inactive

65.5%

65.5% of seats are inactive, and several users have duplicate name entries in the portal.

Recommendations

- Reclaim the unused seats.
- Review the 19 users who haven't been active in the portal in the last year.
- Confirm 2FA is enabled account-wide.

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05

Marketing, Attribution & Reporting

Campaign Attribution · Forms · Email · Landing Pages · Governance

95.1%
no campaign influence

4
email metrics off target

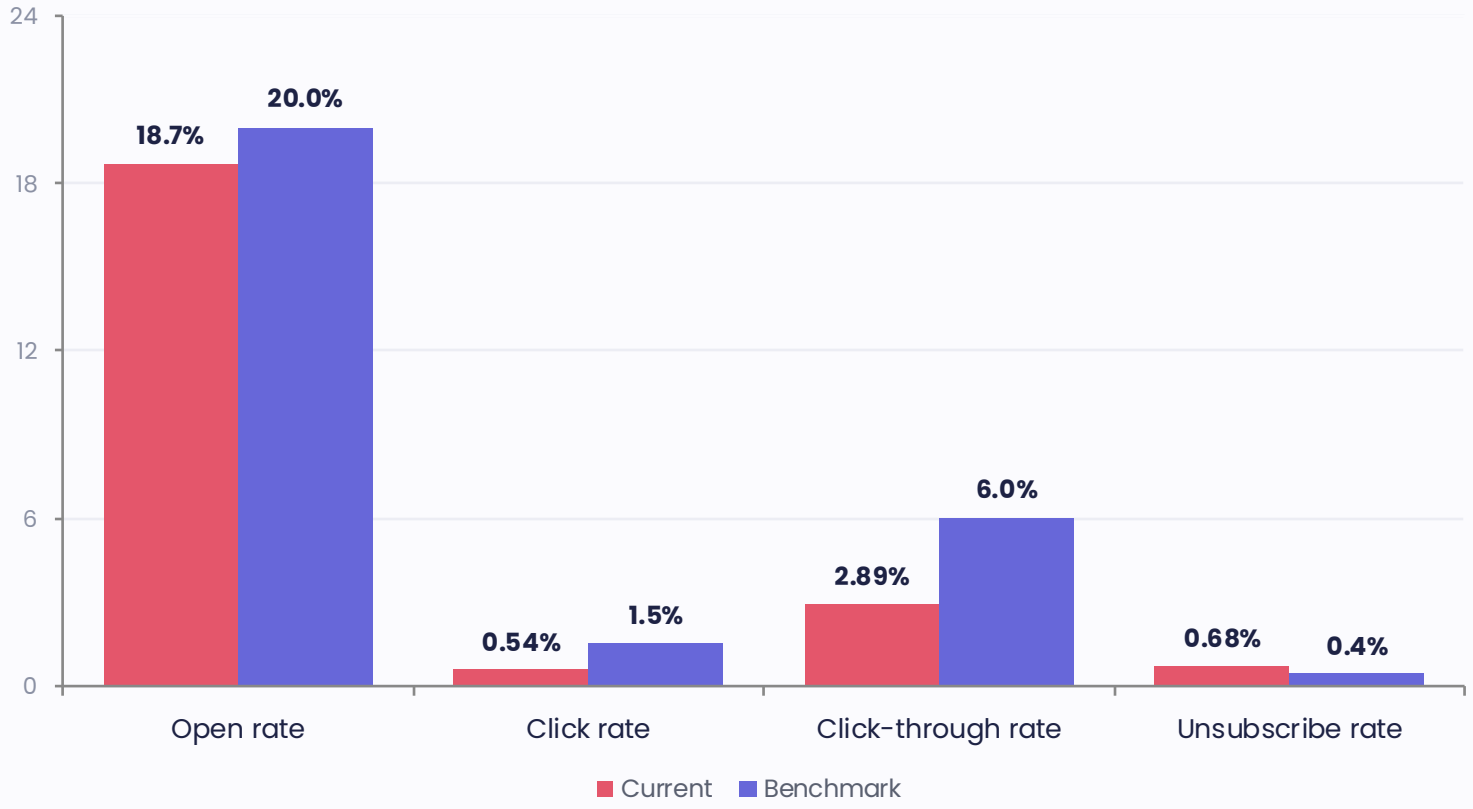
31%
workflows switched off

Marketing — Email Performance vs. Benchmark

~26,715 sent · ~26,607 delivered (99.6%) · trailing 6 months, Jan–Jul 2026. All four core engagement metrics miss benchmark this period.

Engagement metrics against the Benchmark

Each pair shows the current rate against the lowest end of the healthy range. All four fall short of benchmark.



99.6%

Delivery rate

26,607 of 26,715 emails delivered over the trailing 6 months.

0.68%

Unsubscribe rate

Target is under 0.40% — one of four core metrics that miss benchmark.

0.54%

Click rate

Target is 1.5–3% — the widest relative miss of the four metrics.

What to do

- Segment sends by engagement to lift open and click rates.
- Suppress unengaged and unsubscribed contacts before the next send.
- One clear CTA per email; rewrite subject lines.
- Retest subject lines and send times to rebuild engagement.

Marketing — Attribution, Forms & Email

HIGH IMPACT

95.1% of contacts show no campaign influence

95.1%

4,200 contacts have never been influenced by any campaign in your portal.

Recommendations

- Review current assets and add them to the right campaign.
- Create campaign in HubSpot and assign all assets associated.
- Confirm attribution tracking is capturing all touches.
- Standardise UTM naming across channels.

CLEAN UP

123 forms — 122 published, 1 draft

123 forms

122 forms are published and active; only 1 remains in draft.

Recommendations

- Audit and retire the zero-submission forms.
- Consolidate near-duplicate locale variants.
- Confirm Lead Source and UTM capture on every key form.

HIGH IMPACT

All 4 core email metrics miss benchmark

4 metrics off target

Jan–Jul 2026 (trailing 6 months): ~26,715 sent, ~26,607 delivered. Open 18.7% (target 20–28%), click 0.54% (target 1.5–3%), click-through 2.89% (target 6–10%) and unsubscribe 0.68% (target under 0.4%).

Recommendations

- Cut send volume and segment by engagement before sending again.
- Suppress unengaged and unsubscribed contacts before the next send.
- Focus on problem-specific conversion emails and CTAs
- One clear CTA per email and rewrite subject lines.

Governance — Content, Workflows & Scope Gaps

FYI

1,231 site views, 72% Bounce rate

72%

Site views over the last 30 days, with a bounce rate above what's typical for an active B2B site.

Recommendations

- Use this as the baseline for landing-page tests.
- Build conversion-path improvements from here.

MODERATE

114 workflows — 35 off, 4 unfinished

31%

31% of workflows are switched off. Four were never finished: auto-created, unnamed and never configured. The oldest live workflow dates to January 2023.

Recommendations

- Decide on the 4 unfinished drafts.
- Run an archive pass on long-dormant workflows.
- Add a naming convention for new workflows.

FYI

322 segments across contacts, companies and web visitors

322

322 segments exist (310 contact, 11 company, 1 web visitor); usage across active assets has not been fully audited yet.

Recommendations

- Do a deep asset review analysis to define which segments to keep, delete or improve.
- Use a segment of bounced contacts and create a workflow to delete them automatically.
- Review naming conventions: Introduce 'System' lists for regular and long-lasting lists.
- Pilot predictive engagement segmentation using lifecycle and score data already in the portal.

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06

Service & Revenue Integrity

Tickets · SLAs · Deals · Quotes · Activities · Teams

0%
tickets with an active SLA status

100%
closed-won deals with no quote attached

66.8%
meetings with no outcome recorded

Service & Revenue — Ticket SLAs & Deal Documentation

HIGH IMPACT

No SLA policy is tracked on any ticket

0%

All 324 tickets show an unassigned Time to Close SLA status — no SLA policy is actively tracked on the Service pipeline. 92 tickets (28.4%) are still open (74 New, 18 Waiting on us), 33 tickets (10.2%) have no contact or company linked, and 2 duplicate pipeline stages sit orphaned from a broken pipeline edit.

Recommendations

- Enable an SLA policy on the Service pipeline and require it on every ticket.
- Require a contact or company association before a ticket can be created.
- Clear the two orphaned, duplicate pipeline stages.
- Report weekly on the 92 open tickets until SLA tracking is live.

HIGH IMPACT

Closed-won revenue isn't documented

0 of 91

0 of 91 Closed Won deals have a Quote attached, and 140 of 223 deals (62.8%) carry no line items — revenue is tracked as a flat number, not documented through HubSpot's Quotes or Products tools. 40 deals (17.9%) have no amount recorded at all, and 16 of the 91 Closed Won deals (17.6%) closed with a blank or zero amount, understating reported revenue. The product catalog holds only 4 items.

Recommendations

- Require a Quote or line items before a deal can move to Closed Won.
- Backfill amounts on the 16 zero-value won deals.
- Expand the product catalog to match what is actually sold.
- Make Amount a required field before any stage change.

Service & Revenue — Activity Outcomes & Org Structure

MODERATE

Call and meeting outcomes go unrecorded

66.8%

52 of 121 calls (43.0%) have no disposition logged, and 1,762 of 2,638 meetings (66.8%) were never given an outcome — alongside 531 Scheduled, 288 Completed, 51 Rescheduled and 6 Canceled. Without outcomes, show-up rate and meeting-to-next-step conversion cannot be measured from the data as it stands.

Recommendations

- Make outcome a required field when logging calls and meetings.
- Build a "missing outcome" report for reps to clear weekly.
- Add a same-day reminder to log outcomes after every call or meeting.

MODERATE

No Teams configured despite 29 seats

0

Zero Teams exist in the HubSpot account despite 29 user seats — there is no territory or team-based routing and reporting layer at all. 1,695 of 5,331 companies (31.8%) have no Industry set, and 388 (7.3%) have no domain, limiting segmentation further.

Recommendations

- Stand up at least a Sales / Service team split.
- Make Industry mandatory on company creation.
- Backfill domain from email domain where missing.

Thalox Recommended Sequence — First 90 Days

Fixes are ordered so that each phase makes the next one easier: stop the bleeding, then enforce, then optimise.

NOW Days 0–30

Stop the bleeding

- Auto-assign owners on the 293 unowned tickets and backfill by rep.
- Bulk-associate the 1,769 unlinked companies to contacts by email domain.
- Suppress the 171 bounced contacts permanently.
- Clear the 323 flagged duplicates, starting at 95%+ similarity.
- Fix the Location formatting issue affecting 49% of contacts.

EXPECTED OUTCOME

Ticket accountability and account-level reporting become usable from day one.

NEXT Days 30–60

Enforce the rules

- Require contact and company on every new deal.
- Standardise UTM and campaign tagging to close the 95.1% attribution gap.
- Automate inactivity alerts for the 16 stalled deals (40% of open pipeline).
- Make Closed Lost reason a required dropdown (89 of 92 lack one).
- Make Lead Source mandatory on every entry path.

EXPECTED OUTCOME

New records arrive clean, and campaign spend can start being measured properly.

THEN Days 60–90

Optimise and measure

- Archive the 656 unused properties after team sign-off.
- Rebuild the MQL → SQL handoff — only 102 of 1,730 MQLs convert.
- Tier the 7 target accounts and expand ABM to the 21 companies with 5+ contacts.
- Segment email by engagement and retest subject lines — all 4 metrics miss benchmark.
- Consolidate duplicate user entries and reclaim the 19 inactive seats.

EXPECTED OUTCOME

Campaign spend, pipeline and the SQL handoff can finally be measured end to end.

Thalox

Thank you

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