

ILLUSTRATIVE DEMONSTRATION

HubSpot CRM Audit Report

Finding 001 / Premature lifecycle-stage progression

THE DECISION IN ONE SENTENCE

Confirm who may advance a contact to Sales Qualified Lead and require documented qualification before automation makes that change.

This is a hypothetical risk scenario - not a finding identified in a real HubSpot portal.

THE EXAMPLE AT A GLANCE

01 / SETUP

Two automations

A qualifying form can trigger MQL. A separate property may trigger an SQL advance.

02 / RISK

Qualification bypass

If the second trigger is not an approved sales gate, handoffs and funnel counts may be unreliable.

03 / CONTROL

One stage owner

Define the business rule, check every stage-writing source, and test dependent processes.

SCOPE AND LIMITS

IN THIS EXAMPLE

Lifecycle-stage rules, two hypothetical workflow paths, lead routing, and reporting dependencies.

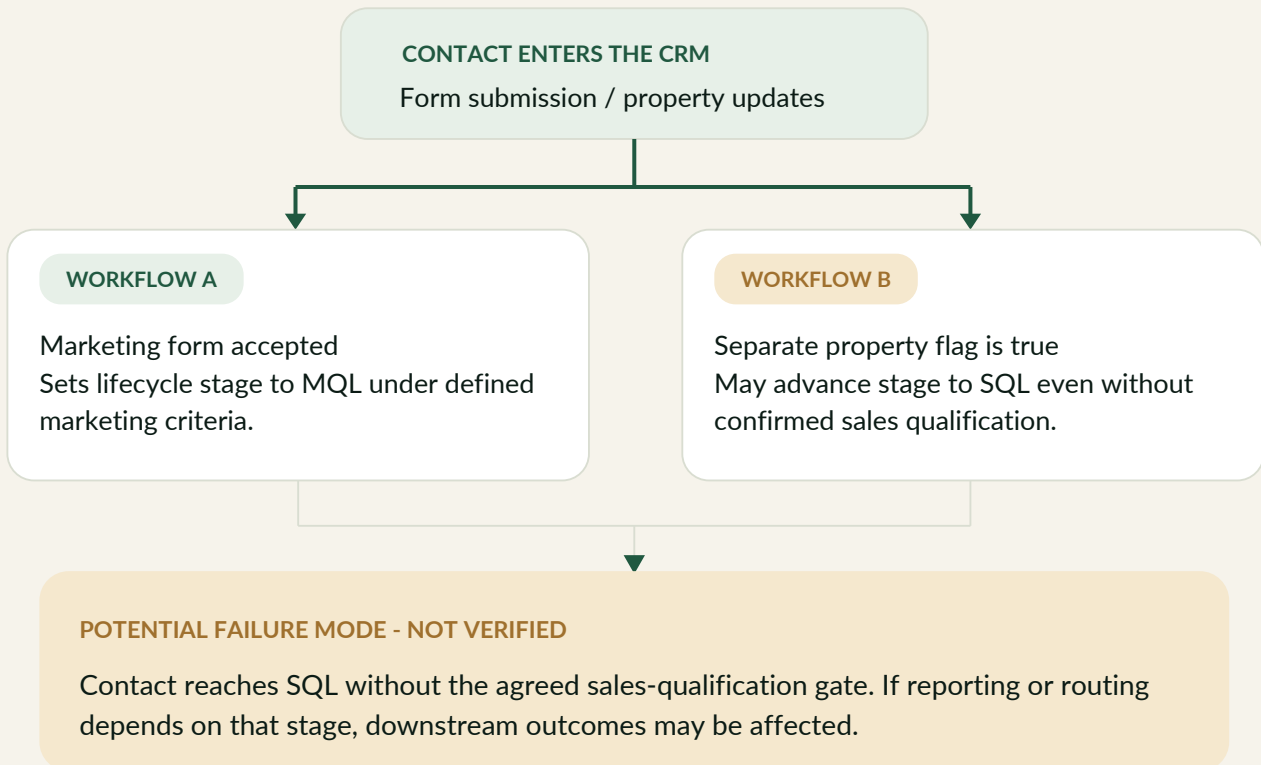
NOT CLAIMED

No client portal accessed; no workflows executed; no records sampled; no business impact measured.

02 / EVIDENCE AND DIAGNOSIS

How the control gap can happen

Conceptual paths only: validate workflow timing and record history before diagnosing any real portal.



EVIDENCE AN AUDITOR WOULD REQUEST

- | | |
|---|---|
| <p>01 Workflow definitions
Enrollment, branches, stage-write actions and re-enrollment settings.</p> | <p>02 Chronology
Workflow history, versions and actual action timestamps.</p> |
| <p>03 Property history
Changed-to value, source and timestamp on representative records.</p> | <p>04 Other writers
Integrations, imports, API updates and manual adjustments.</p> |
| <p>05 Business rules
Documented MQL and SQL definitions plus approval ownership.</p> | <p>06 Dependencies
Owner assignment, alerts, lifecycle reports and handoff SLAs.</p> |

HUBSPOT BEHAVIOR TO ACCOUNT FOR

Default lifecycle stages normally move forward through automation. An earlier stage generally requires clearing the value first; do not assume Workflow A will overwrite SQL with MQL.

03 / PRIORITIZED REMEDIATION

Control design and change plan

Proposed actions to validate and correct the hypothetical configuration. Owners are role suggestions, not assigned personnel.

ILLUSTRATIVE TARGET-STATE LOGIC

MQL eligible

Form meets marketing criteria



Qualification gate

Sales approval is confirmed



Advance to SQL

Only after gate passes

No approval: do not advance to SQL. Retain the appropriate stage and confirm rules with the owner.

REMEDIATION BACKLOG

P1

Approve lifecycle definitions

Define MQL/SQL criteria, the approval signal and one accountable owner for stage progression.

OWNER

Marketing + Sales Ops

P2

Inventory every stage writer

Map workflows, forms, imports, integrations, API actions and manual edits. Trace representative record histories.

OWNER

CRM Administrator

P3

Gate the SQL transition

Make advancement conditional on an approved qualification signal; review enrollment and re-enrollment paths.

OWNER

HubSpot Admin

P4

Check downstream impact

Inspect lead routing, notifications, funnel reports and affected historical records before any correction.

OWNER

RevOps + Analytics

P5

Validate, document, release

Use controlled test records, review simulated paths, verify permitted real actions, and document rollback.

OWNER

CRM Owner + QA

Change-control caution: Do not bulk-reset lifecycle stages or deploy unreviewed rules. Record a rollback plan and separately reconcile existing affected records if an actual audit confirms impact.

04 / VALIDATION PLAN

Prove the rule before sign-off

Expected outcomes for synthetic records only. No actual HubSpot tests were performed.

TEST SCENARIO		EXPECTED STAGE BEHAVIOR	RETAIN AS EVIDENCE
T01	Form qualifies; sales not approved	Stage becomes MQL; no SQL progression.	Trigger result, stage history and routing trace.
T02	SQL flag true; approval absent	Do not advance to SQL; use agreed prior stage.	Branch evaluation and stage-change source.
T03	Approved sales qualification	Advance to SQL once via authorized path.	Approval signal, action log, owner handoff.
T04	No qualifying conditions	No unintended stage change or handoff.	Negative test log and record history.
T05	Re-enrollment / competing paths	No duplicate or premature advancement.	Re-enrollment settings and repeat-test log.

MINIMUM EVIDENCE PACKAGE

Workflow configuration + version / enrollment and action history / lifecycle property history / synthetic test IDs / downstream routing and report check / change approval.

ACCEPTANCE STANDARD

All intended test paths pass, no premature SQL is observed, routing/reporting agree with approved definitions, and the accountable owner signs off.

REFERENCE NOTES (HUBSPOT)

[Lifecycle-stage behavior](#)
[Workflow test simulations](#)
[Record property history](#)