



*The*DATA RESET

A practical guide to fixing your CRM foundations and getting more from HubSpot



EVERYONE HAS A CRM NOT EVERYONE IS USING IT *WELL*

Your CRM might be full of data. The question is whether that data is actually working for you, or quietly costing you revenue.

The data problem is bigger than you think

Most revenue teams believe they have a pipeline problem or a sales problem. Often, it's a data problem. Poor CRM data creates forecasting errors, invisible pipeline leakage, and automation that fires on the wrong contacts at the wrong time.



\$12.9M

Average annual revenue loss attributed to poor data quality*

BUT...

60%

of CRM data becomes inaccurate within a year

30%

of revenue ops teams say bad data is their #1 barrier



Revenue teams are pressured to grow faster, yet many are working from a CRM that contradicts itself; duplicates, dead contacts, misattributed deals. The challenge isn't more data. It's trusting the data you have.

— Dan O'Reilly | CEO, Centralise



CHAPTER ONE

The Cost of Bad Data

Before you can fix anything, you need to understand
what broken actually costs you.





Where bad data hurts your business

CHAPTER ONE | THE COST OF BAD DATA



Inaccurate Forecasting

Deals built on phantom pipeline. Reps closing 'closed won' contacts who stopped responding months ago.



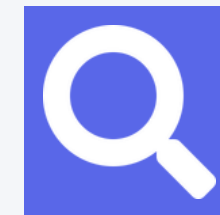
Wasted Marketing Spend

Campaigns firing to dead email addresses, unqualified contacts, or contacts who are already customers.



Broken Automation

Workflows enrol the wrong contacts. Sequences send to people who opted out. Nurture paths lead nowhere.



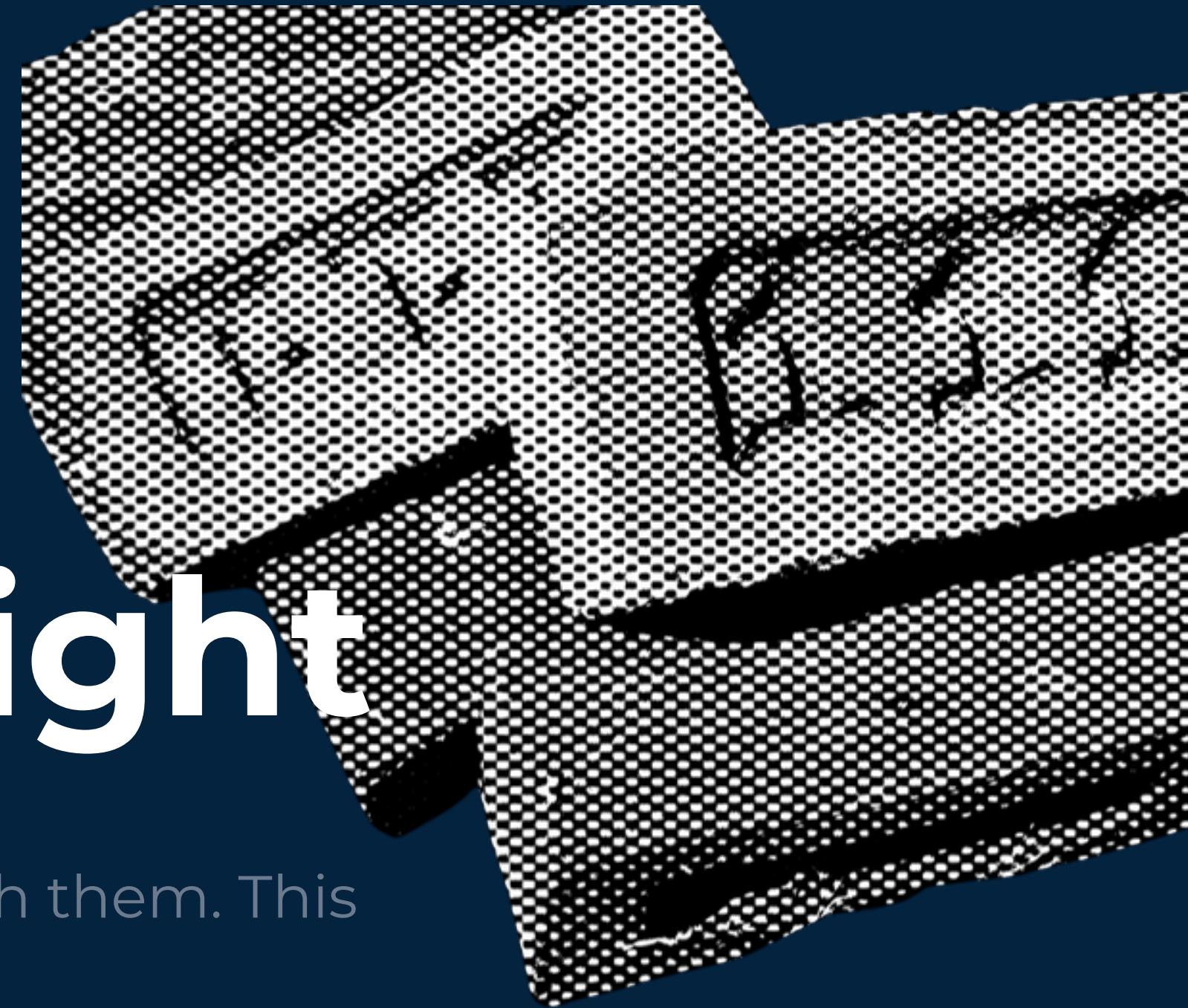
Invisible Revenue Leakage

Deals that stall at the same stage every time. Patterns you can't diagnose because the data tells different stories.

CHAPTER TWO

Getting the Foundations Right

The tools are only as good as the structure beneath them. This is where lasting improvements begin.



What good data foundations look like

CHAPTER TWO | GETTING THE FOUNDATIONS RIGHT

01

A single source of truth

Every customer record lives in one place. Your CRM is the system of record, not spreadsheets, inboxes, or tribal knowledge.

02

Consistent data standards

Properties are named, formatted, and populated consistently. Job titles, lifecycle stages, deal stages, all defined and enforced.

03

Clean contact ownership

Every contact and deal has a clear owner. No orphaned records. No 'who manages this account?' conversations mid-quarter.

04

Automated quality checks

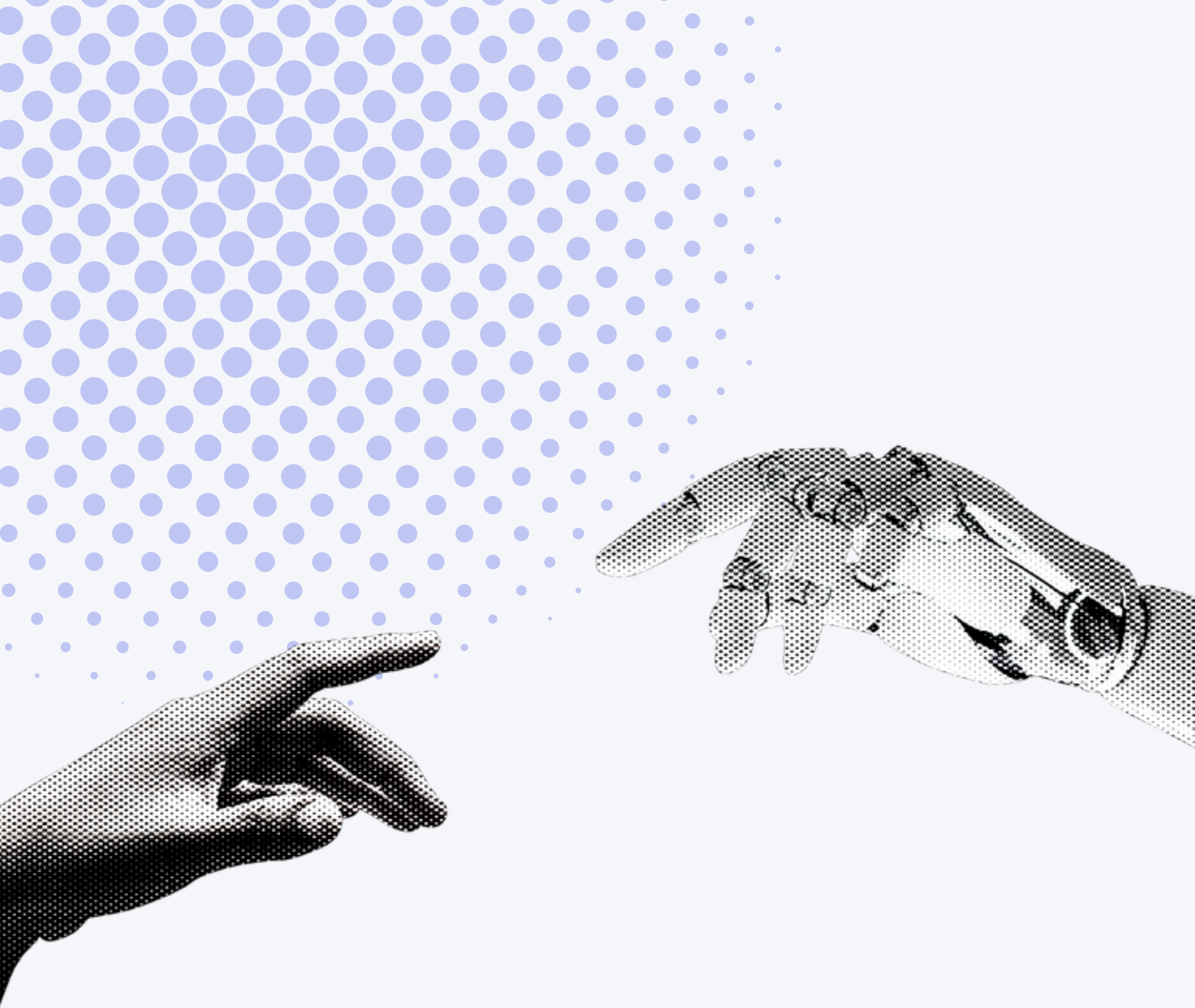
Data hygiene isn't a quarterly project. It's built into your workflows, catching duplicates, blanks, and anomalies before they compound.

AI is only as smart as the data it's trained on.

The pressure to adopt AI in revenue teams is real: 9 in 10 leaders plan to use it more. But AI built on messy CRM data doesn't accelerate you. It accelerates the wrong things.

Before AI can help you score leads, predict churn, or personalise at scale, your CRM needs to be a system worth trusting.

**Data quality isn't actually a data problem,
it's a business risk.**



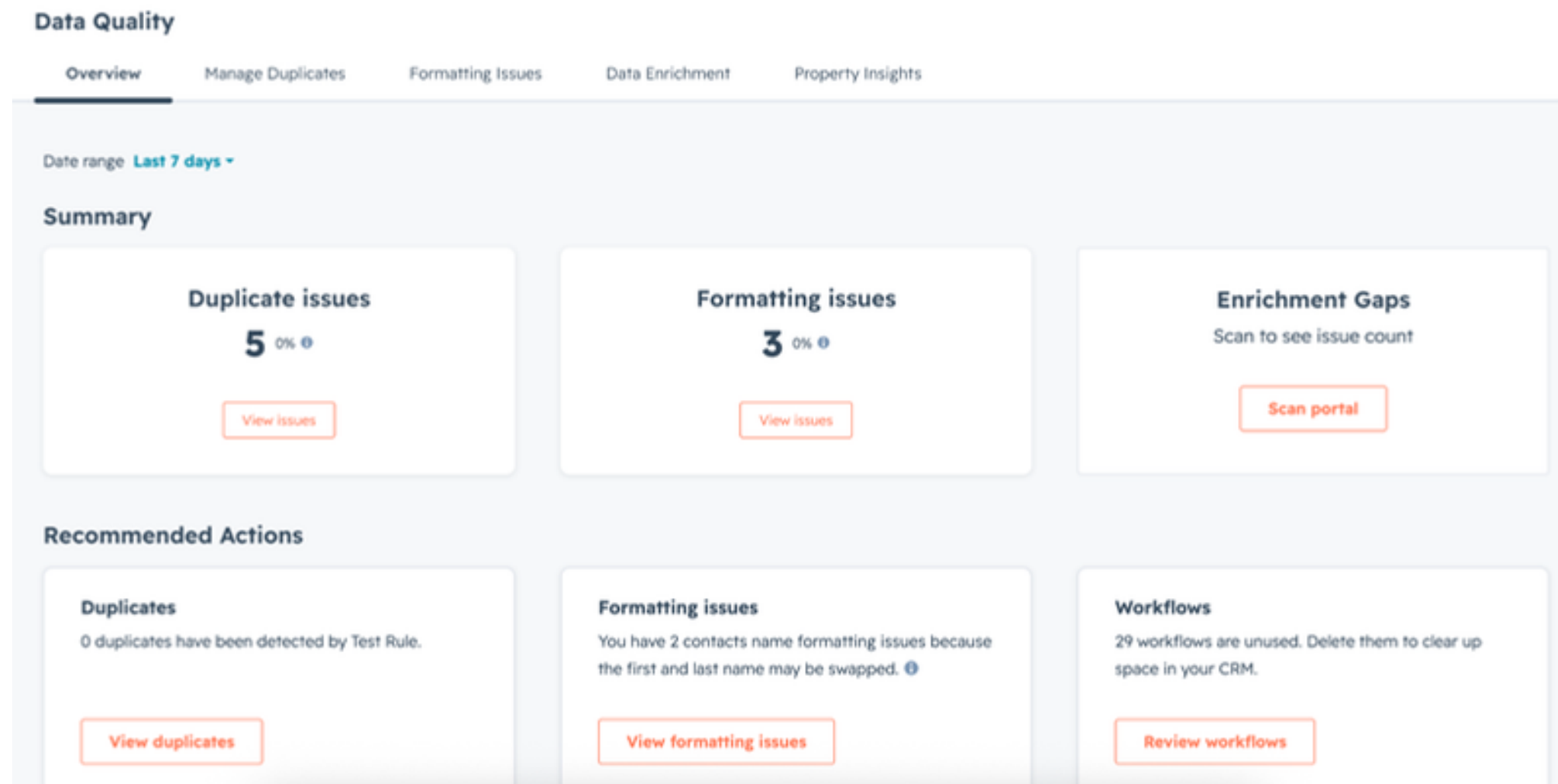
CHAPTER THREE

HubSpot Quick Wins to Start Today

You don't need a six-month project to see progress. Here's where to begin.



The HubSpot Data Studio



What it is

The Data Studio is HubSpot's centralised dashboard for monitoring and fixing CRM data health. It surfaces duplicate records, property issues, integration problems, and unused workflows, all in one place.

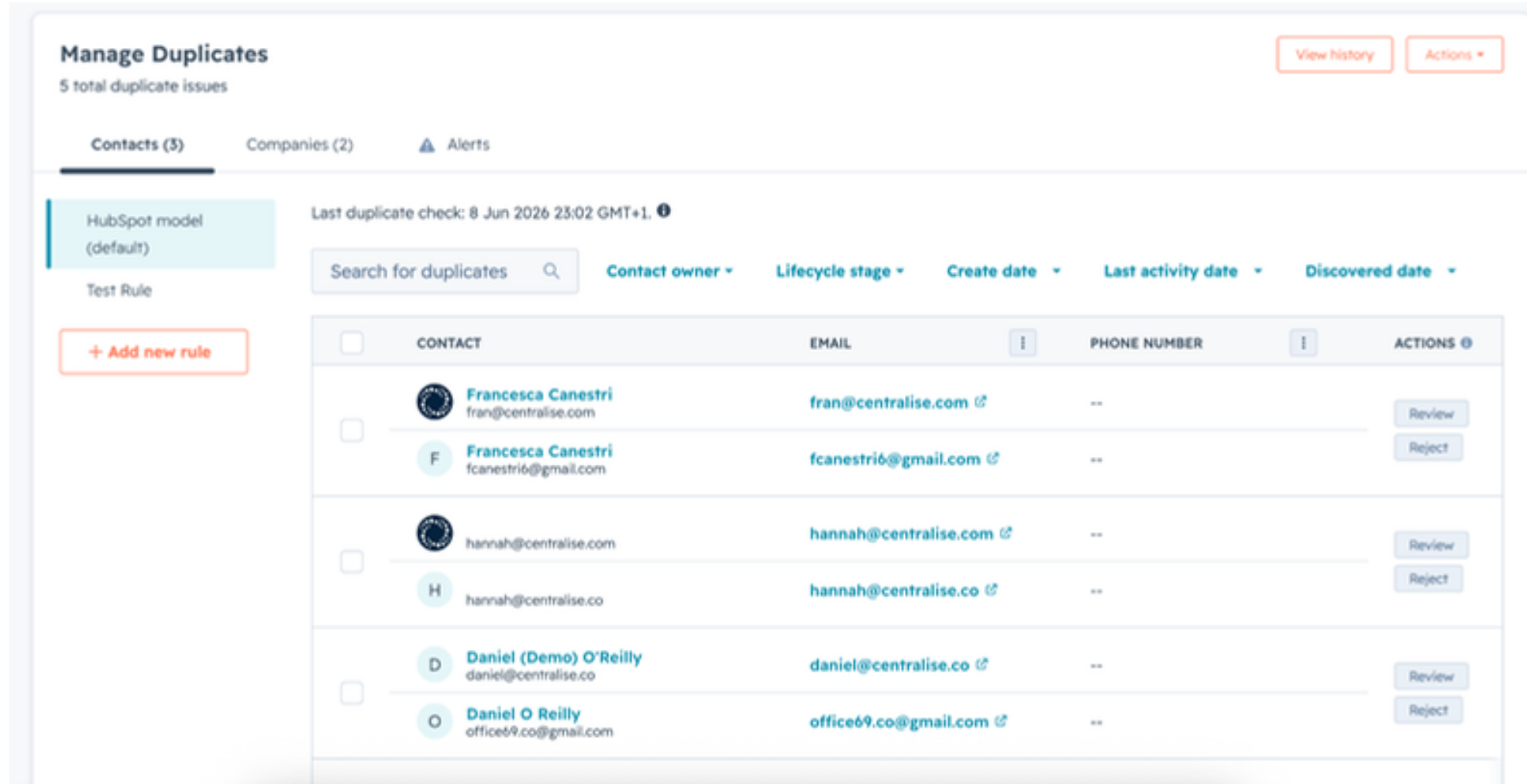
What it shows you

- Duplicate contacts and companies
- Properties with missing or inconsistent data
- Integration sync errors with connected apps
- Workflows with errors or low engagement

Tier requirement:

Data Hub Professional or Enterprise. If you're on Starter or Free, you'll need to upgrade or work with a partner like Centralise to run the audit on your behalf.

Run the Duplicates Manager



How to access it

In HubSpot: go to Contacts → Actions → Manage Duplicates. HubSpot automatically flags potential duplicate contacts and companies, with a confidence score for each match.

Why it matters

- Duplicate contacts skew all your reporting
- Sequences may send the same email twice to the same person
- Deal attribution becomes unreliable

Available on:

All HubSpot tiers automatically prevent exact duplicate entries on creation. However, finding and cleaning existing duplicates using the Duplicates Manager requires a Professional or Enterprise subscription. If you're on Starter or Free, a third-party Marketplace app such as Koalify can fill the gap.

Audit your properties and lifecycle stages

Properties audit

Most HubSpot portals accumulate unused properties over time, ie. fields nobody fills in, labels that mean different things to different people, and duplicated data points.

Go to Settings → Properties and sort by 'last used'. Archive anything unused in the past 6 months. Standardise naming conventions. Fewer, better properties beats more.

Lifecycle stage governance

If lifecycle stages are being set manually or inconsistently, your pipeline reports are fiction. Define exactly what triggers each stage and automate the transitions.

Start with a simple audit: export contacts, filter by lifecycle stage, and check whether the distribution makes sense. If 40% of your database is 'Lead' with no activity in 12 months, that's your starting point.

Start here: ask your team what 'MQL' means to them. If you get three different answers, your lifecycle stages need governance.

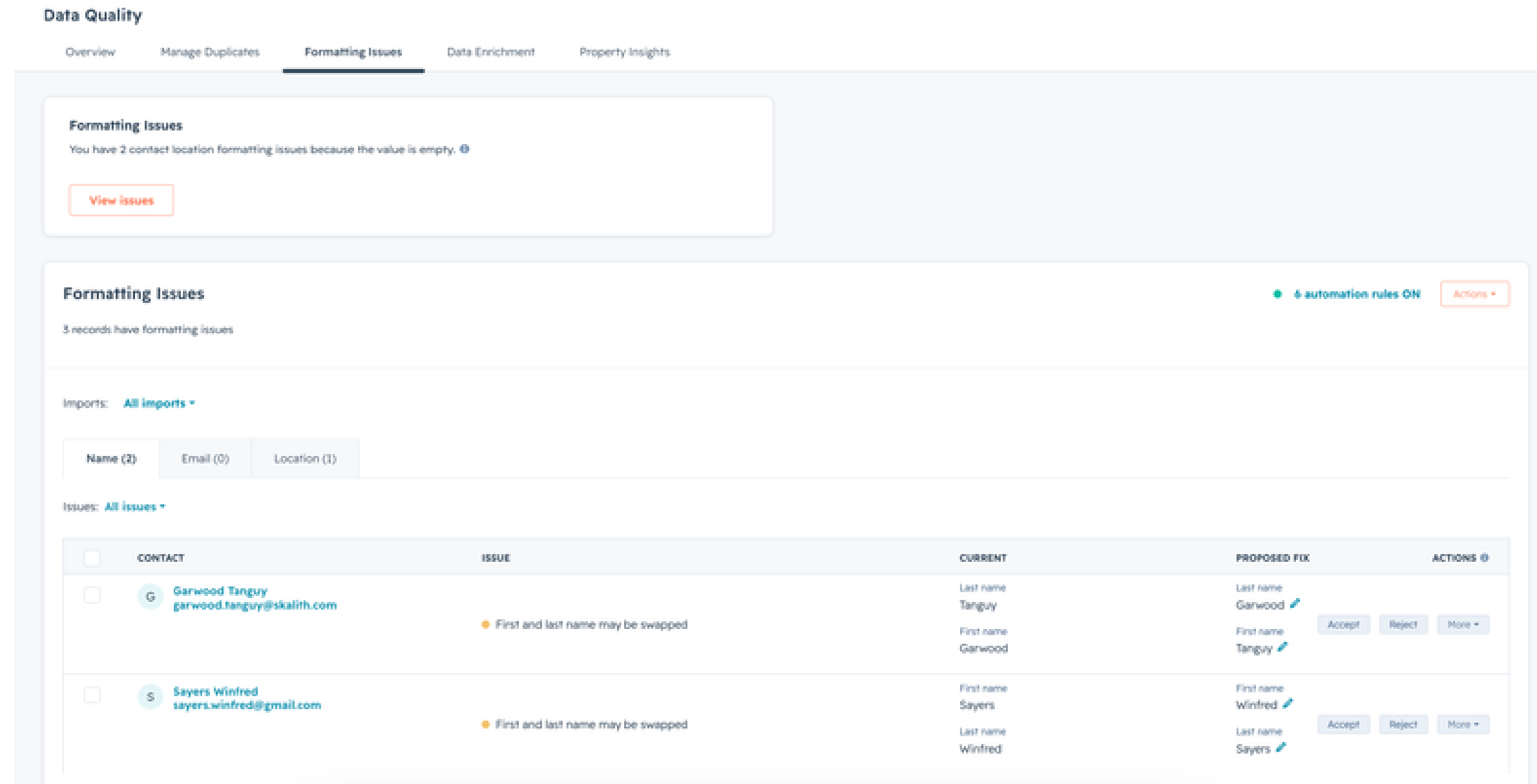
Set up data quality automation

The self-cleaning CRM

Manual data cleanup is a losing battle. The answer is automation that catches quality issues at the point of entry before they compound.

With Operations Hub Professional, you can use Data Quality Automations inside HubSpot Workflows to:

- Standardise name capitalisation and formatting
- Fill in missing properties from known data points
- Auto-set lifecycle stages based on contact behaviour
- Flag records that fall below a data quality threshold



The screenshot displays the 'Data Quality' section in HubSpot, specifically the 'Formatting Issues' tab. It shows a summary of formatting issues and a detailed table of records with problems.

Data Quality

Overview | Manage Duplicates | **Formatting Issues** | Data Enrichment | Property Insights

Formatting Issues

You have 2 contact location formatting issues because the value is empty. ⓘ

[View issues](#)

Formatting Issues 5 automation rules ON [Actions](#)

3 records have formatting issues

Imports: [All imports](#)

Name (2) | Email (0) | Location (1)

Issues: [All issues](#)

☐	CONTACT	ISSUE	CURRENT	PROPOSED FIX	ACTIONS ⓘ
☐	 Garwood Tanguy garwood.tanguy@skalith.com	• First and last name may be swapped	Last name Tanguy First name Garwood	Last name Garwood First name Tanguy	Accept Reject More
☐	 Sayers Winfred sayers.winfred@gmail.com	• First and last name may be swapped	First name Sayers Last name Winfred	First name Winfred Last name Sayers	Accept Reject More

Requires: Operations Hub Professional or Enterprise

Your data reset starts here.

Four things you can do this week

01

Run the Duplicates Manager

Takes 30 minutes. The impact is immediate.

02

Open the Data Quality Command Center

Requires Data Hub Professional or Enterprise. Upgrade to access it, or ask your partner to walk you through what it would reveal.

03

Audit your properties

Sort by 'last used' in Settings. Archive anything older than 6 months. Standardise what remains.

04

Define your lifecycle stage criteria

Get sales and marketing in a room. Agree on exactly what triggers each stage. Then automate it.



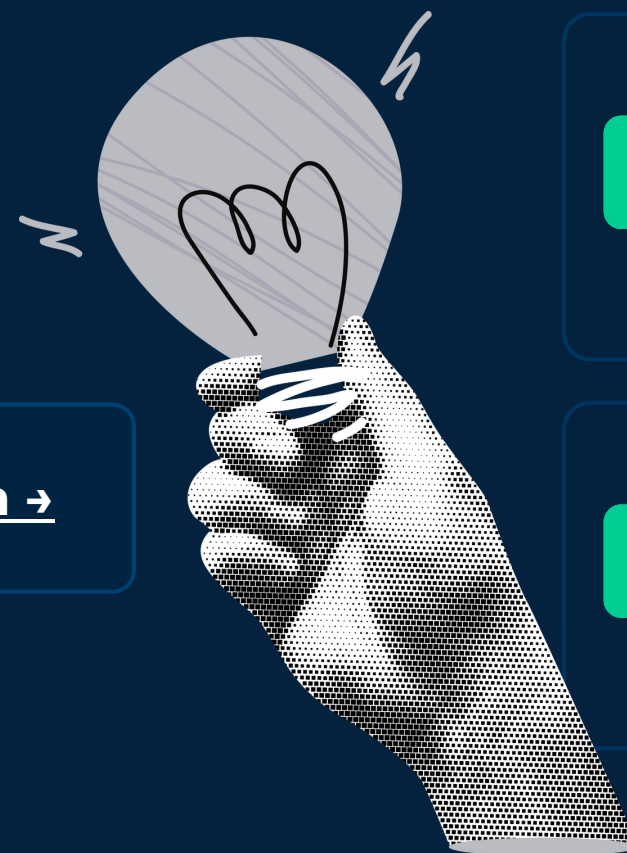
Centralise is a HubSpot Elite Partner, top 20 globally. We work with mid-market B2B teams whose CRM has become a liability. They leave with a CRM they trust.

YOUR CRM IS EITHER WORKING FOR YOU OR AGAINST YOU.

Lets make sure it's the former.

[Get a free audit →](#)

[Talk to the team →](#)



centralise.com

250+

Projects completed

Top 20

HubSpot partners
globally

Elite

Partner status

ISO 27001:2022

Certified: zero
nonconformities

01

CRM Audit & Data Foundations

We map what's broken, quantify the cost, and give you a prioritised fix list.

02

Revenue Infrastructure Design

We build the systems that make forecasting, reporting, and automation actually work.

03

HubSpot Implementation & Optimisation

From first deployment to ongoing improvement, configured to match how your team works.