



A PRACTICAL CHECKLIST

The Data Reset

Fixing your CRM foundations, and getting more from HubSpot, without a six-month project.

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

Everyone has a CRM. Not everyone is using it well.

\$12.9M

Average annual revenue loss attributed to poor data quality

60%

Of CRM data becomes inaccurate within a year

30%

Of revenue ops teams say bad data is their

#1 barrier

Source: Gartner / IBM estimates

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, Founder, Centralise

The cost of bad data

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

Inaccurate forecasting

Deals built on phantom pipeline. Reps closing "closed won" against 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.

Getting the foundations right

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

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.

WHY THIS MATTERS NOW

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.

**Data quality isn't actually a data problem.
It's a business risk. AI is only as smart as the data it's trained on.**

CHAPTER THREE

HubSpot quick wins to start today

You don't need a six-month project to see progress. Here's where to begin: four moves you can make this week, in order of how quickly they pay off.

1 Clean up duplicates

- ☐ Go to Contacts → Actions → Manage Duplicates
- ☐ Review each flagged pair against its confidence score
- ☐ Merge the genuine duplicates, dismiss the false matches
- ☐ Repeat monthly, so duplicates don't quietly rebuild

All tiers block duplicates on creation where the email matches exactly; cleaning up existing duplicates needs Professional or Enterprise (or a Marketplace app like Koality on Starter/Free)

Next step: a data cleanse dashboard that flags contacts and companies missing a name, email, or owner, plus anything bounced or gone quiet, so you're not hunting for these issues manually. [Centralise can build this into your portal](#) rather than you piecing it together yourself.

2 Run a data health check

- ☐ Open the HubSpot Data Studio
- ☐ Check the duplicate contacts and companies count
- ☐ Check properties with missing or inconsistent data
- ☐ Check integration sync errors with connected apps
- ☐ Check workflows with errors or low engagement
- ☐ Assign an owner to fix each issue you find

Requires Data Hub Professional or Enterprise. On Starter or Free, ask a partner like Centralise to run the audit for you.

3 Audit your properties

- ☐ Go to Settings → Properties and sort by "last used"
- ☐ Archive anything unused in the past 6 months
- ☐ Standardise naming on what remains

Fewer, better properties beats more.

4 Get lifecycle stages under control

- ☐ Ask three people on your team what "MQL" means. Count the different answers.
- ☐ Export contacts, filter by lifecycle stage, and check whether the distribution makes sense
- ☐ Get sales and marketing in a room. Agree exactly what triggers each stage.
- ☐ Automate the transitions so stages stop being set manually

If 40% of your database is "Lead" with no activity in 12 months, that's your starting point.

5 Automate the cleanup

- ☐ Go to Workflows and create a Data Quality Automation
- ☐ 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

Requires Operations Hub Professional or Enterprise

None of this needs a six-month project.

Work through the five steps above in an afternoon, and your CRM is already in better shape than it was this morning.

Your CRM is either working for you or against you.

Let's make sure it's the former. 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.

[Get a free audit](#)

[Talk to the team](#)

250+

Projects completed

Top 20

HubSpot partners globally

Elite

Partner status

ISO 27001

Certified: zero nonconformities



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