SYNTHETIC DEMONSTRATION

Sample Pipeline Truth Audit

Juniper Ridge Advisory

Fictional 35-person B2B services firm using one HubSpot portal

Synthetic audit window: April 1 - June 30, 2026

AUDIT FORMAT

Read-only. Evidence-led. Testable.

5 BUSINESS DAYS / FIXED SCOPE

Executive brief

The synthetic evidence shows a partially observable pipeline that is not yet controlled enough for broader automation. Ownership, lifecycle, follow-up, and reporting rules produce conflicting outcomes across the same qualified population.

240
CONTACTS CREATED
Synthetic population

78
QUALIFIED CONTACTS
Record evidence

13
REPORT VARIANCE
91 displayed / 78 supported

29
UNASSIGNED
11 qualified

22
NO NEXT STEP
Within one business day

16
UNEXPECTED STAGE
Qualified subset

FINDING MIX

1 Critical / 3 High / 2 Medium

Severity reflects control risk, not estimated revenue.

IMPORTANT LIMIT

This is not a client report, testimonial, benchmark, or statement of achieved results. Every company, record, count, date, and finding is fictional.

Prepared to demonstrate format, rigor, and decision usefulness - not performance.

01 / HOW THE AUDIT IS BOUNDED

Scope, method & limits

A useful audit says what was reviewed, how evidence was classified, and what remains unknown.

IN SCOPE

- One fictional HubSpot portal
- One 90-day population of 240 contacts
- 78-record qualified subset
- Six ownership or lifecycle workflows
- Three reports
- Forty sampled property histories
- Owner roster, routing matrix, lifecycle rules, and follow-up policy

READ-ONLY METHOD

Records, property histories, workflow configurations, report filters, and policy documents were reconciled by ID and timestamp. No workflow, property, owner, report, or record was changed.

METHOD STEPS

- Freeze the population and definitions.
- Trace field and record history.
- Compare configuration to written policy.
- Reconcile reports to exact record IDs.
- Separate evidence, indication, and unknown.
- Write a repeatable acceptance test.

EVIDENCE LABELS

CONFIRMED

Directly supported by the fictional record, configuration, or approved policy.

INDICATED

Supported by multiple clues, but insufficient for writer attribution.

UNKNOWN

Evidence is absent, contradictory, or outside the audit scope.

LIMITATIONS AND EXCLUSIONS

- **No deliverability, paid-media, legal-compliance, or revenue-attribution assessment.**
- **No production change, data repair, workflow enrollment, send, publish, or deletion.**
- **No guaranteed improvement, conversion lift, sales outcome, or revenue recovery.**
- **No unknown history is backfilled or inferred from a nearby event.**

Findings describe control conditions - not lost revenue or guaranteed improvement.

02 / CURRENT-STATE BASELINE

One population. Seven controls.

The baseline makes denominators visible and preserves uncertainty instead of presenting missing instrumentation as zero.

CONTROL	RESULT	DENOMINATOR	STATUS
Contacts with current owner	211 / 240	All created contacts	87.9%
Qualified contacts with owner	67 / 78	Qualified contacts	85.9%
Usable first-known source	197 / 240	All created contacts	82.1%
Expected lifecycle stage	62 / 78	Qualified contacts	79.5%
Next step within one business day	56 / 78	Qualified contacts	71.8%
Report-to-record reconciliation	78 supported	91 displayed	13 variance
Workflows with recovery evidence	2 / 6	In-scope workflows	33.3%

Largest observable gaps

No next step	22 / 78	28.2%
Unexpected stage	16 / 78	20.5%
Qualified without owner	11 / 78	14.1%
Workflows missing recovery evidence	4 / 6	66.7%

INTERPRETATION RULE

These figures are an illustrative baseline, not industry benchmarks. A count becomes a finding only when it conflicts with the approved rule, population, or acceptance condition. Unknown remains unknown.

03 / EVIDENCE MODEL

Which field answers which question?

The audit maps each business question to primary evidence before interpreting the result.

BUSINESS QUESTION	PRIMARY EVIDENCE	SUPPORTING EVIDENCE
How did the person first interact online?	Original Traffic Source and drill-down fields	Tracking configuration
How was the CRM record created?	Record Source and Record Source Detail	Import or integration history
Who owns the contact now?	Contact owner	Contact owner property history
Who should own it?	Approved routing matrix	User eligibility and team roster
What lifecycle stage is current?	Lifecycle stage	Property history and approved stage rules
What automation executed?	Workflow action and revision history	Enrollment history
Was follow-up completed?	Task, meeting, activity, or disposition timestamp	Response policy
Why does the dashboard show that total?	Exact record IDs and report configuration	Saved record view

CAUSALITY RULE

A nearby event is timeline evidence. It is not writer attribution unless property history, workflow action history, import evidence, or integration logs identify the process that wrote the value.

04 / FINDINGS 1-2

From evidence to a repeatable test

Each finding states the synthetic evidence, operational effect, recommended control, and proof required to close it.

CRITICAL

F-01

Routing has no reliable terminal fallback

EVIDENCE	29 of 240 contacts were unassigned. Eleven were qualified; eight reached no terminal owner branch in the synthetic workflow preview.
OPERATIONAL EFFECT	Qualified records can enter manual triage without an accountable owner.
RECOMMENDED CONTROL	Approve one routing matrix with eligibility rules, exclusions, and a named fallback queue or owner.

ACCEPTANCE TEST

Create six fictional records covering three positive paths, one unmatched path, one ineligible-user path, and one recovery path. All six must reach the expected owner or fallback within five minutes.

HIGH

F-02

Source fields are mixed across different business questions

EVIDENCE	43 contacts had blank or unknown Original Traffic Source. Nineteen still had a valid import or integration Record Source. Two reports used the fields interchangeably.
OPERATIONAL EFFECT	Acquisition and record-creation reporting cannot be interpreted consistently.
RECOMMENDED CONTROL	Publish a field dictionary separating first-known interaction, record creation, and property-change provenance. Preserve unknown history.

ACCEPTANCE TEST

Review ten fictional records spanning form, import, manual creation, and integration paths. Each report must use the field matching its stated question; no unknown source may be inferred.

04 / FINDINGS 3-4

From evidence to a repeatable test

Each finding states the synthetic evidence, operational effect, recommended control, and proof required to close it.

HIGH

F-03

Qualified records do not reach the expected lifecycle stage

EVIDENCE	16 of 78 qualified contacts had an unexpected stage. Nine showed no qualifying stage write, five later reverted, and two lacked enough history to attribute.
OPERATIONAL EFFECT	Segmentation, handoffs, and stage-based automation can operate on conflicting populations.
RECOMMENDED CONTROL	Approve stage definitions, permitted writers, forward and backward rules, and exception handling before modifying automation.

ACCEPTANCE TEST

Run baseline, positive, negative, exception, and recovery cases on fictional records. Stage changes must occur only under the approved rule, and every write must appear in property history.

HIGH

F-04

The qualified-lead follow-up control is incomplete

EVIDENCE	22 of 78 qualified contacts had no task, meeting, or documented disposition within one business day. Fourteen were owned and eight were also unassigned.
OPERATIONAL EFFECT	The team cannot distinguish pending work from an intentionally closed path.
RECOMMENDED CONTROL	Define one observable next-step requirement, response window, fallback, and disposition vocabulary.

ACCEPTANCE TEST

Six fictional qualified records must each create the expected task or disposition. Pass only when all six show an owner, due time, status, and recovery path.

04 / FINDINGS 5-6

From evidence to a repeatable test

Each finding states the synthetic evidence, operational effect, recommended control, and proof required to close it.

MEDIUM

F-05

Dashboard and record-level populations do not reconcile

EVIDENCE	The dashboard displayed 91 qualified leads; the approved saved view supported 78. The dashboard used Create date and included recycled records, while the saved view used Qualification date and current stage.
OPERATIONAL EFFECT	Review meetings can discuss different populations under the same label.
RECOMMENDED CONTROL	Define the metric, population, date property, aggregation, and exclusion rules beside the report.

ACCEPTANCE TEST

Freeze the 78-record snapshot and reconcile every displayed count to the same record IDs. Passing variance: zero unexplained records.

MEDIUM

F-06

Workflow changes lack consistent recovery evidence

EVIDENCE	Four of six workflows had no saved baseline or rollback note; three lacked a named approver; two lacked a recovery owner.
OPERATIONAL EFFECT	An unexpected result may be difficult to contain, recover, or explain.
RECOMMENDED CONTROL	Require a baseline, approval, test record, stop condition, recovery owner, and post-change evidence for every production change.

ACCEPTANCE TEST

All six workflow records must contain the six required controls before any separately approved implementation begins.

05 / DECISION-READY ROADMAP

Sequence controls before automation

Priority reflects control dependency and reversibility, not a promised financial return.

PRIORITY	CONTROL	OWNER ROLE	COMPLETION EVIDENCE
P0	Approve routing matrix and fallback	Revenue operations owner	Six-case routing test passes
P0	Freeze lifecycle definitions and writers	CRM owner	Five-case stage test passes
P0	Define qualified-lead next-step SLA	Sales operations owner	Six-case follow-up test passes
P1	Publish source field dictionary	Analytics owner	Ten-record source review passes
P1	Rebuild qualified-lead report definition	Reporting owner	78 IDs reconcile exactly
P1	Adopt change and recovery register	System owner	Six of six workflows documented

Suggested sequence

01
PRESERVE
Freeze the current baseline and exact record population.

02
DEFINE
Approve terms, conditions, exceptions, and accountable owners.

03
TEST
Use fictional or sandbox records to exercise positive and recovery paths.

04
CHANGE
Implement only under a separately approved production scope.

05
RECONCILE
Repeat the tests and document residual unknowns.

BOUNDARY

This roadmap proposes controls. It does not claim that any change has been implemented or that a business outcome will result.

06 / WHAT THE PAID AUDIT INCLUDES

Terms, evidence & references

The sample shows the expected artifact. The actual audit remains fixed-scope, read-only, and dependent on available evidence.

ILLUSTRATIVE AUDIT TERMS

- Fixed read-only scope
- One portal, one 90-day window, six workflows, and three reports in this demonstration
- Five business days after required access and evidence are available
- Sample commercial term: $1,500 fixed fee, 100% upfront
- Production changes, data repair, and ongoing monitoring excluded
- Least-privilege access only; no credential sharing
- No warranty of revenue, conversion, attribution completeness, or platform behavior
- Current website and written proposal terms govern; an actual audit may produce different findings
- Any implementation requires a separate signed scope, approval, baseline, test plan, and recovery plan

SYNTHETIC EVIDENCE REGISTER

E-01	240-contact population export
E-02	78-record qualified saved view
E-03	Owner and fallback breakdown
E-04	Traffic Source vs. Record Source matrix
E-05	40 sampled owner and lifecycle histories
E-06	Follow-up activity review
E-07	Three report configurations and ID reconciliation
E-08	Six-workflow control inventory

Official product reference context

Used to design synthetic tests; these sources do not prove any portal has the sample findings. Accessed 2026-07-28.

01 **Traffic Source properties**

02 **Record Source property**

03 **Lifecycle stages**

04 **Contact and company owner sync**

05 **Workflow re-enrollment**

06 **Dashboard filters**

07 **Automatic contact-company association**

08 **Import errors**

WHAT THIS SAMPLE DEMONSTRATES

A Pipeline Truth Audit converts portal evidence into a bounded issue map, current-state baseline, prioritized roadmap, and repeatable acceptance tests. The actual client keeps the artifact whether or not implementation is purchased.

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