



HubSpot Pipeline Control Checklist

A 10-minute, read-only evidence check for 5-30 person B2B service teams.

CHECK AN ITEM ONLY WHEN PORTAL EVIDENCE PROVES IT. UNKNOWN COUNTS AS UNCHECKED.

01 Evidence and definitions

- ☐ Lifecycle and deal stages have measurable entry and exit criteria plus a named owner.
- ☐ Five sampled leads can be traced through timestamps and history without relying on memory.

02 Source

- ☐ Original source is preserved; later touches use latest source or source detail.
- ☐ Missing historical attribution stays Unknown / legacy rather than being guessed.

03 Ownership

- ☐ Every active lead has one accountable owner or approved queue; inactive users are resolved.
- ☐ Records matching no rule reach a named fallback within the agreed response window.

04 Routing

- ☐ Positive, negative, and exception samples each route once without loops.
- ☐ The record shows which rule ran, when it ran, and whether the task or notice succeeded.

05 Next action

- ☐ Every open qualified lead has a visible next action, responsible person, and due date.
- ☐ Automated follow-up cannot send without approved content, consent controls, and ownership.

06 Reporting

- ☐ Each key tile reconciles to source records using the same date range and timezone.
- ☐ Missing instrumentation is Pending or Unknown - never zero or treated as a sale.

07 Change control

- ☐ Each proposed change has a baseline, exact asset, approval, recovery method, and rollback trigger.
- ☐ Completed changes have positive, negative, and exception-test evidence.

08 Access

- ☐ Every user has a named account, MFA, and least privilege; credentials are never shared.
- ☐ High-risk rights stay off unless an exact approved task requires them, then are removed.

Evidence score

_____ / 16

Unchecked = needs proof.

14-16 Controlled

Repeat quarterly or after material change.

10-13 Needs attention

Assign the lowest category an owner.

6-9 Unreliable

Baseline before more automation.

0-5 High exposure

Freeze broad changes until reviewed.

Safety override: unauthorized sends, unrecoverable changes, or unexplained access require review at any score.

Do not fix the score. Fix the evidence behind it.

Circle one unchecked item, assign one owner, and define one observable pass test. The online self-check needs no email.

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