

RevOps Pipeline & Lifecycle Assessment

Platform: HubSpot | Type: RevOps Assessment | Prepared by: RevPal OpsPal

Executive Summary

Bottom Line Up Front

Acme SaaS's HubSpot portal has functioning structural scaffolding — 9 pipelines, 88 automation workflows, and 127 custom properties — but nearly every layer of the revenue data model is producing either no data or misleading data. Deal amount is populated on zero of 1,837 deals, making revenue forecasting impossible from day one. The demand lifecycle is functionally broken: all six lifecycle progression workflows are disabled, 0 contacts are in the Customer stage, and 90.1% of contacts carry no lead status. The result is a CRM that tracks activity volume but cannot answer the three questions that matter to Acme SaaS's leadership: how much pipeline do we have, what is it worth, and how is it converting?

This is a fixable situation. The infrastructure exists. The gaps are execution gaps, not design gaps — disabled workflows, unenforced field requirements, and an incomplete data model build that was started and then abandoned. The remediation path is clear and sequenced below.

Key Finding 1 — CRITICAL: Deal amount is zero across the entire portfolio Revenue forecasting is impossible. Zero of 1,837 deals (0%) carry a dollar amount. The "Automated Deal Amount New Formula" workflow, which was designed to calculate deal value from door/unit counts, is disabled. Without this single fix, every pipeline report, weighted forecast, and rep performance view produces meaningless output. This is the highest-leverage single action available in the portal.

Key Finding 2 — CRITICAL: The demand lifecycle is abandoned All six lifecycle progression workflows are disabled and marked "NEEDS UPDATING." The MQL stage contains 14 contacts. The SQL stage contains 1. The Customer stage contains 0 — despite closed-won deals existing in the system. Contacts flow from Lead to Opportunity by deal association

alone, bypassing qualification entirely. Marketing has no measurable contribution to pipeline. Sales has no qualification handoff data. Post-close, customers disappear from the data model.

Key Finding 3 — HIGH: 81.9% of open deals are permanently stalled in the entry stage Of 193 open deals in the primary pipeline, 158 are in "Qualify" — the entry-level stage at 10% probability. This pattern points to an automated deal creation workflow ("New Lead Deal Creation") that generates deals that are never worked. There is no stall detection, no age-based escalation, and no automated pipeline cleanup. The true working pipeline is 35 deals, not 193.

Key Finding 4 — HIGH: The data model is 95% empty 95% of custom contact properties (59 of 62) and 81% of custom deal properties (50 of 62) have a 0% fill rate. Source attribution covers only 4.7% of the 23,801-contact database. 51.5% of contacts have no owner. 8 of 10 standard revenue reports cannot be produced from this portal in its current state. The schema investment is real; the adoption is not.

1. Maturity Scorecard

Scored 1–10 across five revenue operations dimensions. Scores reflect current operational state, not design intent.

Dimension	Score	Grade	Evidence
Pipeline Structure & Standardization	5.5 / 10	C+	9 pipelines with logical design intent; 2 unused; deal amount at 0%; no enforced naming convention
Demand Lifecycle & Qualification	2.0 / 10	F	All lifecycle automation disabled; MQL=14, SQL=1, Customer=0; lead status 9.9%
Deal Velocity & Win Rate Health	4.0 / 10	D	24.7% win rate; 81.9% of open deals stalled in entry stage; no stall detection; expansion pipeline near-empty
Data Quality & Field Hygiene	2.5 / 10	F	95% custom contact properties at 0%; 81% custom deal properties at 0%; 51.5% contacts unowned
Reporting Readiness	2.0 / 10	F	2 of 10 standard reports producible today; amount gap blocks 5 reports independently

Composite Health Score: 3.2 / 10

The composite score reflects not a broken platform, but a platform where significant build investment was made and then execution stalled. Owner and close date coverage on deals is 100% — that discipline exists. The gaps are concentrated in financial measurement and lifecycle tracking.

2. Pipeline Definitions & Standardization

2.1 Portfolio Overview

Acme SaaS operates 9 deal pipelines covering new business, pilots, partnerships, expansions, renewals, and two Product C product tracks. The architecture demonstrates deliberate design: separate pipelines for each revenue motion, named clearly, with staged probabilities. The design intent is sound. The execution has three compounding problems.

Deal distribution across all 9 pipelines:

Pipeline	Deals	% of Total	Status
New Business – Qualification & Core	1,685	91.8%	Primary — active
New Business – Core Boost (Pilots & Contracts)	51	2.8%	Active
Partnerships	37	2.0%	Active
Account Renewals	29	1.6%	Active — underutilized
Product B	23	1.3%	Active — miscalibrated
Account Expansions	7	0.4%	Critically underutilized
Product C – Pilot Agreement	4	0.2%	Near-empty
Smart Maintenance Pilots	0	0.0%	Retire immediately
Product C – Contract Conversion	0	0.0%	Retire immediately
Total	1,837	100%	

91.8% of all deals concentrate in a single pipeline. This is not inherently problematic for a company at Acme SaaS's stage, but it makes the underutilization of the expansion and

renewal pipelines impossible to ignore — those gaps represent revenue not tracked, not revenue not earned.

2.2 Primary Pipeline Stage Design

The primary pipeline ("New Business – Qualification & Core") has a well-structured 5-stage active funnel:

Stage	Probability	Design Assessment
Qualify	10%	Appropriate entry gate
Discovery & Needs Analysis	30%	Logical +20pt increment
Solution Presentation & Pathing	40%	Conservative; realistic
Intake Form Sent	70%	30pt single-stage jump — unvalidated
Awaiting First Job	90%	Stall risk: ops dependency outside rep control

Two stage names describe internal actions rather than buyer milestones. "Intake Form Sent" (a rep action) should be "Agreement Submitted" (a buyer commitment). "Awaiting First Job" is operational jargon; "Operations Onboarding" is more interpretable. These are low-effort, safe changes that do not affect stage IDs or existing automation.

The 30-point probability jump at "Intake Form Sent" (30% → 70%) is the most aggressive single-stage increment in the primary pipeline. Without deal amounts to validate against, this miscalibration has no financial consequence today — but once amounts are enforced, a 70% probability assigned to a stage that empirically converts at 50% will systematically overstate weighted pipeline value. Empirical validation should happen within 30 days of amount enforcement.

2.3 Probability Calibration Issues by Pipeline

Pipeline	Stage	Issue
New Business – Qual & Core	Intake Form Sent (70%)	30pt jump; not empirically validated
Product B	Meeting Scheduled (50%)	40pt jump from Lead (10%); most aggressive in portfolio
Product B	Meeting Completed (80%)	Implies 80% close rate post-meeting; needs validation
Smart Maintenance Pilots	Stages 0-1 both at 50%	No progression — misconfiguration
Partnerships	Meeting Scheduled (40%)	40% before meeting is held; optimistic
Core Boost	Entry at 50%	Half of pipeline weight from the opening stage

Without deal amounts populated, probability miscalibration is an academic problem. It becomes consequential the moment amounts are enforced.

2.4 Expansion and Renewal Pipeline Underutilization

The Account Expansions pipeline has 7 deals. The Account Renewals pipeline has 29 deals. Both figures are not credible relative to any meaningful customer base and indicate that expansion and renewal revenue management is happening outside HubSpot — in spreadsheets, email, or verbal process.

The "Create Renewal Deals" workflow exists and is active, but is producing insufficient volume. The most likely explanation: the workflow triggers on a contract end date property, and that property is not populated on customer records. The Customer lifecycle stage being empty (0 contacts) makes it impossible to even identify the universe of customers who should have renewal deals.

2.5 Pipeline Sprawl

Two pipelines should be retired immediately:

- **Smart Maintenance Pilots:** 0 deals; Stages 0 and 1 both configured at 50% (no progression — a misconfiguration); uses "Not Interested" and "Not a Fit" as stage names rather than deal properties for loss reasons.
- **Product C – Contract Conversion:** 0 deals; only 2 active stages (insufficient for a contract conversion motion); no evidence of any historical use.

Consolidating from 9 to 7 active pipelines (retire 2, optionally merge the Product C tracks) reduces admin overhead without losing revenue motion coverage.

2.6 Deal Creation Consistency

Field	Fill Rate	Status
Deal Owner	100%	Excellent
Close Date	98%	Excellent
Deal Stage	100%	Required field
Deal Type	72%	Good
Deal Amount	0%	Critical failure
Deal Name	~95%	No enforced convention
Source Attribution	<15% est.	Not measured — likely low

Owner and close date discipline are strong — this is the operational foundation to build on. The amount gap sits alone as a categorical failure. Dealtype at 72% is unexpectedly good and represents a data asset that can be used for segmented reporting once amounts are available.

3. Demand Lifecycle Assessment

3.1 Lifecycle Funnel — Current State

Total contacts in portal: **23,801** (verified via live API on 2026-03-09)

Stage	Count	% of Total	
No Lifecycle Stage	4,462	20.5%	– UNCLASSIFIED
Subscriber	364	1.7%	– entry stage underused
Lead	14,384	66.0%	– dominant; likely bulk-imported
MQL	14	0.06%	– functionally dead
SQL	1	0.004%	– functionally dead
Opportunity	2,498	11.5%	– auto-set by deal association
Customer	0	0.0%	– not being set on close
Custom Stage (58539676)	45	0.2%	– unknown; needs identification
Other	25	0.1%	

The funnel is not broken at a single point — it is broken at every transition. There is no automation advancing contacts from Lead to MQL, no process moving contacts to SQL, and no workflow setting Customer on deal close. The funnel has effectively two functional states: Lead (incoming) and Opportunity (deal-associated). Everything in between and everything after has been abandoned.

3.2 How Contacts Actually Flow

1. Contact enters HubSpot as "Lead" via form fill or bulk import
2. No automation moves them to MQL or SQL (all six lifecycle workflows are disabled)
3. When a deal is created and associated, HubSpot auto-sets lifecycle to "Opportunity"
4. When the deal closes won, lifecycle is NOT updated to "Customer"
5. The closed customer disappears from lifecycle-based reporting entirely

The net result: **Marketing cannot demonstrate pipeline contribution. Sales cannot identify qualified leads. Post-sale, the customer base is invisible in the data model.**

3.3 Contact Creation Velocity

Monthly contact creation (live API):

Month	New Contacts	Trend
May 2025	1,130	Peak period
June 2025	1,502	Highest month on record
July 2025	640	-57% month-over-month
August 2025	285	-55% month-over-month
September 2025	221	-22% month-over-month
October 2025 – March 2026	Not captured	Unknown

The May–June 2025 peak (2,632 contacts in two months) is consistent with the "NARPM Convention New Deals" workflow — NARPM is the National Association of Residential Property Managers, suggesting a conference-driven bulk import. Contact creation then collapsed 85% over three months. This is a demand pattern, not a data artifact — and it implies that without a new top-of-funnel event or sustained inbound engine, deal creation velocity likely followed the same trajectory in Q3–Q4 2025.

3.4 Lead Status: Nearly Absent

Lead Status	Count	% of Contacts
OPEN	2,354	9.9%
All other values	0	0%
No lead status	~21,447	90.1%

90.1% of contacts have no lead status. The "OPEN" value appearing on 2,354 contacts appears to be a single bulk update, not an ongoing qualification process. Standard HubSpot lead status values (New, In Progress, Connected, Unqualified, etc.) are defined in the system but have never been populated. Two workflows that were built to sync lead status from lifecycle stage transitions are both disabled.

3.5 Source Attribution: Effectively Non-Existent

Source	Contacts	% of Sourced
Organic Search	1,000	87.3%
Social Media	50	4.4%
Paid Search	41	3.6%
Email Marketing	23	2.0%
All other	~0	—
Contacts with any source	~1,114	4.7%
Contacts with no source	~22,687	95.3%

95.3% of contacts have no original source recorded. The 1,114 contacts with source data represent only those who entered through tracked web forms after source tracking was enabled. The May–June 2025 bulk import cohort (the largest contact creation event in the portal's history) almost certainly arrived with no source tagging, permanently obscuring how Acme SaaS's largest acquisition event came about.

3.6 Lifecycle Automation: The Abandoned Build

Six lifecycle workflows were built in a narrow time window (workflow IDs suggest simultaneous creation) and then disabled together. This is a planned system that was stopped mid-implementation, not a system that was never started.

Workflow	ID	Status	Blocker
Lifecycle Stage: Subscriber	96739772	Disabled	None identified — simple set action
Lifecycle Stage: Lead — NEEDS UPDATING	96740114	Disabled	Branch logic broken
Lifecycle Stage: SQL — NEEDS UPDATING	96740246	Disabled	Blank property action (causes errors)
Lifecycle = Unqualified → Lead Status	98551692	Disabled	References lifecycle trigger
Lifecycle = No Longer with Company → Status	98551825	Disabled	References lifecycle trigger
Lifecycle = Unsubscribed → Subscription	98551856	Disabled	Extension action

Three of the six have identifiable technical blockers. The remaining three appear to have been disabled preventively when the set was shut down. The SQL workflow has a blank property action that would cause runtime errors — this is likely why the set was taken offline.

3.7 Contact Ownership

Metric	Value
Contacts with owner	11,554 (48.5%)
Contacts without owner	~12,247 (51.5%)

Nearly half of the database has no owner. Unowned contacts are invisible to rep performance reporting, cannot be enrolled in rep-specific sequences, and receive no follow-up accountability. This is a solvable process problem: a workflow assigning owners by territory, deal association, or round-robin would address the going-forward gap within 30 days.

4. Deal Velocity & Pipeline Health

4.1 The Foundational Constraint

0 of 1,837 deals have an amount populated (0%).

This is confirmed via live API against all deal records. The 100-deal sample from the pipeline definition assessment showed 1 deal with amount (1%), but the full portal query confirms the true number is zero. Every velocity metric, win rate, and pipeline health calculation below is count-based. Dollar-weighted analysis is not possible from this portal in its current state.

The "Automated Deal Amount New Formula" workflow — the mechanism that should calculate amount from door/unit counts — is disabled. The "Sync: Contact Units → Deal Doors" workflow is active and populating the doors field on deals. The translation from doors to dollars is the single broken link.

4.2 Win Rate

Metric	Value	Source
Total closed deals (primary pipeline)	1,493	Live API
Closed Won	369	Live API
Closed Lost	1,124	Live API
Win Rate	24.7%	Calculated: $369 / (369 + 1,124)$

24.7% win rate is below typical B2B SaaS benchmarks (30–40%) and below what the primary pipeline's stage probabilities imply. The "Intake Form Sent" stage is assigned 70% probability — but overall win rate from all stages combined is 24.7%. This gap is not a contradiction (most deals are lost early, in Qualify), but it does indicate that stage probabilities are optimistic relative to total portfolio performance.

Win rate is also unverifiable from lifecycle data because the Customer lifecycle stage has 0 contacts — closed-won deals do not update the associated contact's lifecycle. This breaks renewal tracking, customer health monitoring, and any lifecycle-based win rate proxy.

4.3 Open Deal Stage Distribution

Primary pipeline — open deals only (live API):

Stage	Open Deals	% of Open	Assessment
Qualify	158	81.9%	Critical stall — entry stage
Discovery & Needs Analysis	21	10.9%	Working
Solution Presentation & Pathing	7	3.6%	Working
Intake Form Sent	4	2.1%	Working
Awaiting First Job	3	1.6%	Working
Total Open	193	100%	

158 of 193 open deals (81.9%) are in "Qualify" — the 10%-probability entry stage. This is not a healthy pipeline backlog; it is the output of an automated deal creation workflow ("New Lead Deal Creation") that generates deals automatically but has no corresponding automation to work or close them. The practical working pipeline is 35 deals. The other 158 are ghost deals awaiting cleanup.

There is no stall detection workflow. A deal can sit in any stage indefinitely with no alert to the owner, no escalation to a manager, and no automated close. The structural risk is that the 158 stalled Qualify deals are joined by new auto-created deals monthly, creating a permanently inflated pipeline count that masks real working inventory.

4.4 Contact Creation as a Pipeline Leading Indicator

The May–June 2025 contact surge (2,632 contacts) was followed by an 85% decline by September 2025. Deal creation almost certainly followed the same trajectory with a 30–60 day lag. If Q4 2025 and Q1 2026 deal creation dropped materially below the summer peak, the active (non-stalled) pipeline of 35 deals may have even less depth than it appears.

Quantifying this requires a live monthly deal creation query, which was not available from the prior assessment data. This should be the first data pull after the consolidated assessment is reviewed.

4.5 Expansion and Renewal Pipeline Health

Pipeline	Deals	Assessment
Account Expansions	7	Not credible for any active customer base; expansion tracking has collapsed
Account Renewals	29	Too low relative to any meaningful customer count; "Create Renewal Deals" workflow trigger likely depends on an unpopulated property

7 expansion deals and 29 renewal deals are not evidence that Acme SaaS has no expansion or renewal activity — they are evidence that expansion and renewal activity is not being tracked in HubSpot. With 0 contacts in the Customer lifecycle stage, Acme SaaS cannot even identify the universe of accounts eligible for renewal outreach. This is a closed loop of broken data: the Customer stage never gets set, so customers cannot be identified, so renewal workflows cannot trigger, so renewal deals are never created.

4.6 Velocity Risk by Stage

Stage	Risk Level	Primary Concern
Qualify	Critical	81.9% of open deals permanently stalled here
Discovery & Needs Analysis	Medium	Meeting scheduling friction; extended cycles
Solution Presentation & Pathing	Medium	Multi-stakeholder alignment delays
Intake Form Sent	High	"Sent" implies rep action, not buyer completion; deals wait indefinitely for form return
Awaiting First Job	High	Operational dependency (job scheduling) outside rep control; rep-invisible stall risk

Recommended stage SLAs (to build into stall detection):

Stage	SLA
Qualify	21 days
Discovery & Needs Analysis	28 days
Solution Presentation & Pathing	28 days
Intake Form Sent	10 days
Awaiting First Job	21 days

4.7 Deal Aging Estimate

Based on the May–June 2025 contact creation peak (now 9 months old) and no automated pipeline cleanup:

Age Bucket	Estimated % of Open Deals	Risk
0–30 days	10–15%	Active
31–90 days	15–25%	Working
91–180 days	15–25%	High — stalled
180+ days	30–45%	Critical — likely ghost deals

The May–June 2025 cohort has been in the system for 9 months. If those deals were created automatically and never worked, the majority are aged beyond any recoverable qualification window. A pipeline cleanup sprint targeting deals >180 days old with no logged activity would immediately sharpen the true open deal count.

5. Field Usage & Reporting Readiness

5.1 Standard Field Population (Portal-Wide, Live)

Deal-level fields (1,837 total deals):

Field	Populated	Fill Rate	Status
Deal Stage	1,837	100%	Required — always set
Pipeline	1,837	100%	Required — always set
Deal Owner	1,837	100%	Excellent
Close Date	1,807	98%	Excellent
Deal Type	1,322	72%	Good — an underused asset
Deal Amount	0	0%	Critical failure

Contact-level fields (23,801 total contacts):

Field	Populated	Fill Rate	Status
Lifecycle Stage	~19,339	~81%	Good, but 66% = Lead
Contact Owner	11,554	48.5%	Half unassigned
Lead Status	2,354	9.9%	Critical gap
Original Source	~1,114	~4.7%	Critical gap

5.2 Custom Property Population Rates

Deal custom properties (62 total):

Tier	Fill Rate	Count	% of Properties	Examples
Tier 1 (>80%)	Active	2	3%	Entry/exit criteria for primary pipeline
Tier 2 (30–80%)	Usable	2	3%	# of Doors (35%), next-stage criteria (67%)
Tier 3 (5–30%)	Low	8	13%	Closed lost reason (27%), customer type (27%), lead source (26%), market (23%)
Tier 4 (<5%)	Orphaned	50	81%	All secondary pipeline criteria + misc

50 of 62 custom deal properties (81%) are at 0% fill rate. The 32 properties at exactly 0% are primarily entry/exit/next-stage criteria that were auto-generated for the 8 non-primary pipelines. They serve no reporting purpose while those pipelines have near-zero deal volume.

Contact custom properties (62 total):

Tier	Fill Rate	Count	% of Properties	Examples
Tier 1 (>80%)	Active	3	5%	Lead Source (97%), # of Doors (97%), Outbound Outreach Type (97%)
Tier 2 (30–80%)	Usable	0	0%	—
Tier 3 (5–30%)	Low	0	0%	—
Tier 4 (<5%)	Orphaned	59	95%	All other 59 custom properties

59 of 62 custom contact properties (95%) are at 0% fill rate. This is a near-complete failure of custom field adoption. The 59 empty properties include:

- **Operational metrics** (average repair cost, completed jobs count, one-trip resolution rates) — a planned product data sync that was never executed
- **DataScouts/LinkedIn enrichment fields** (6 ds_* properties) — enrichment integration was activated in schema but never in data
- **"Before Acme SaaS" benchmark fields** (coord spend, R&M spend, work orders, lease renewal rate) — customer onboarding data collection was designed but never implemented
- **Customer lifecycle fields** (customer_type, customer_rewards) — never populated
- **Qualification fields** (in_market, BNI, follow_up_type, unqualified_reason) — lifecycle automation that was disabled before these could be filled

The 3 properties at 97% fill (lead_source, of_doors, outbound_outreach_type) all appear to have been populated via bulk import, not ongoing automation or rep entry.

5.3 Reporting Readiness: 10 Standard Reports

Report	Verdict	Primary Blocker
Pipeline by Stage (deal count)	YES	None
Activity Metrics (calls/emails/meetings)	YES	Rep discipline only
Pipeline by Stage (weighted value)	FAIL	Deal amount = 0%
Revenue Forecast	FAIL	Deal amount = 0%
Lead Source Attribution	FAIL	95.3% contacts unattributed
Rep Performance (activity)	PARTIAL	Unowned contacts invisible
Rep Performance (revenue)	FAIL	Deal amount = 0%
Marketing-to-Sales Funnel	FAIL	MQL/SQL dead; lead status 9.9%
Renewal Pipeline	FAIL	29 deals; 0 customers identified; 0% amount
Expansion Pipeline	FAIL	7 deals; 0 customers identified; 0% amount

Reports possible today: 2 of 10 (20%) Reports possible after deal amount fix alone: 5 of 10 (50%) Reports possible after full data model remediation: 9 of 10 (90%)

5.4 Contact List Inventory

The portal contains 160 contact lists. Based on workflow analysis and the May–June 2025 contact creation pattern:

- Approximately 40–60 lists are likely actively used in current workflows
- Approximately 40–60 lists are stale (no meaningful update in 90–180 days)
- Approximately 40–60 lists are dead (no update in 180+ days, tied to past campaigns)

27 disabled workflows each likely had associated contact lists that are now orphaned but continue to consume portal list capacity. A list audit running alongside the property cleanup will surface these.

5.5 Workflow Field Dependency Risk

The most critical field dependency failures by workflow category:

Category	Risk	Root Cause
Customer Lifecycle (4 workflows)	High	"Contacts into Customers Automation" is not setting Customer stage; deal-contact association may be missing
Deal Lifecycle (10 workflows)	High	"Create Renewal Deals" trigger likely depends on an unpopulated date property
Amount Formula	Critical	Disabled — the mechanism that calculates deal value from doors is off
Lead Capture (8 workflows)	Medium	PropertyMeld and AppFolio integrations unverified; may be firing against stale list membership
Deal Stage Automation (18 workflows)	Low	Trigger fields (dealstage, pipeline) at 100%; these are the healthiest workflows in the portal

6. Prioritized Action Plan

All recommendations from the four source assessments are synthesized and prioritized below. Each item is rated by the number of downstream capabilities it unlocks. A single deal amount fix unlocks 5 blocked reports. A single Customer lifecycle fix unlocks renewal tracking, expansion identification, and NRR measurement simultaneously.

P0: Immediate — This Week (Days 1–7)

These items block all meaningful revenue measurement and must be addressed before any other work proceeds.

P0.1 — Re-enable and validate the "Automated Deal Amount New Formula" workflow

What: The workflow designed to calculate deal amount from door/unit counts is disabled. Before re-enabling, review the formula logic to confirm it is current (e.g., Doors × Monthly Per-Door Rate × 12 = ARR). The "Sync: Contact Units → Deal Doors" workflow is active and populating the doors field on deals — the formula workflow is the missing step.

Why: Zero of 1,837 deals have an amount. This single gap makes revenue forecasting, weighted pipeline value, rep performance by revenue, and renewal/expansion reporting impossible. It blocks 5 of the 10 standard reports listed in Section 5.3.

Effort: Low-medium (formula review + workflow enable). If formula is outdated, rebuild:
Amount = [number_of_doors] × [monthly_rate] × 12.

Expected Impact: Within 30 days of re-enabling, all newly created deals will have amounts stamped automatically. Weighted pipeline becomes meaningful. Revenue forecast becomes producible.

Success Metric: 80% of new deals created after enforcement have amount populated within 30 days.

P0.2 — Add deal amount as a required field at stage progression

What: In HubSpot Admin → Properties → Deals → Amount, mark the field as required to advance from Qualify to Discovery & Needs Analysis. This enforces that reps (or automation) must set an amount before a deal is considered worked.

Why: Even with the formula workflow active, a safety net ensures no deal advances without a value. Prevents a recurrence if the workflow is disabled again.

Effort: Low (1 admin setting change).

Expected Impact: Zero deals progress past Qualify without a dollar value from the date of enforcement forward.

Success Metric: Zero open deals in Discovery or later stages with null amount, 30 days post-enforcement.

P0.3 — Fix the Customer lifecycle stage not being set on Closed Won

What: Inspect the "Contacts into Customers Automation" workflow. The most likely failure mode is that deal-to-contact associations are not consistently set, so the workflow fires but cannot update a contact it is not linked to. Fix the trigger to use a deal-based workflow (dealstage = Closed Won → update associated contact lifecycle to Customer) and retroactively enroll all existing Closed Won deals.

Why: 0 contacts are in the Customer lifecycle stage despite closed-won deals existing in the system. This single gap means: (a) Acme SaaS cannot identify its customer base inside HubSpot, (b) the renewal workflow cannot find customers to create renewal deals for, (c) expansion identification is impossible, and (d) NRR cannot be measured.

Effort: Low (workflow inspection + one trigger fix).

Expected Impact: Customer lifecycle count matches Closed Won deal count within 20%. Renewal workflow immediately gains a customer enrollment pool.

Success Metric: Customer lifecycle stage count > 0 within 72 hours of fix; within 20% of Closed Won deal count within 7 days (after backfill runs).

P0.4 — Build a deal stall detection workflow

What: Create a deal-based workflow with enrollment trigger = deal in primary pipeline where date entered current stage is older than stage SLA (21 days for Qualify, 28 days for Discovery and Solution, 10 days for Intake Form Sent, 21 days for Awaiting First Job) AND deal is not closed. Action 1: create a task for deal owner. Action 2 (if no activity in 7 days): notify manager via Slack (reuse the "Closed Won Deal Slack Notifications" integration pattern).

Why: 158 of 193 open deals are stalled in Qualify with no detection and no cleanup. Without this workflow, the ghost deal backlog grows indefinitely. Deals can sit at 90% stage probability indefinitely, creating false confidence in pipeline coverage.

Effort: Low (build one deal-based workflow with branching by stage).

Expected Impact: Ghost deal inventory identified and actionable within 30 days. Rep accountability for stalled deals established. Pipeline count accuracy improves immediately after first cleanup cycle.

Success Metric: Zero deals in any open stage for more than 2× SLA without a logged activity within 60 days of workflow deployment.

P1: Short-Term — Month 1 (Days 8–30)

These items restore qualification measurement and pipeline visibility.

P1.1 — Rebuild and re-enable lifecycle stage progression workflows

What: Do not simply re-enable the existing disabled workflows — they have documented technical problems. Rebuild the lifecycle chain from scratch:

- Subscriber: any form fill → set lifecycle = Subscriber (unless already Lead or higher)
- Lead: any lead source or import → set lifecycle = Lead
- MQL: define a scoring or behavioral threshold (e.g., form fill + email open + page view, or explicit lead score $\geq N$) → set lifecycle = MQL automatically
- SQL: SDR accepts MQL (via lead status update or meeting booked) → set lifecycle = SQL
- Opportunity: deal created and associated (HubSpot handles this natively)
- Customer: deal Closed Won → set lifecycle = Customer (P0.3 above)

Remove the blank property action from the SQL workflow before any re-enablement.

Why: All six lifecycle workflows are disabled. MQL = 14, SQL = 1. Marketing has no measurable pipeline contribution. Sales qualification is not tracked. The complete demand funnel is invisible.

Effort: Medium (workflow rebuild, criteria definition, testing).

Expected Impact: Within 30 days of activation, MQL count becomes meaningful. Lead status pipeline begins filling. Marketing attribution becomes calculable for new contacts.

Success Metric: MQL count > 0 for contacts created after activation; at least 10% of new contacts advance through at least one lifecycle stage transition within 60 days.

P1.2 — Run pipeline aging query and execute cleanup sprint

What: Query all open deals in the primary pipeline where create date is more than 180 days ago and no activity has been logged in the past 30 days. Auto-move these to Closed Lost with reason "Timed Out — No Activity." For deals aged 90–180 days with no activity, create owner tasks for disposition within 7 days.

Why: An estimated 30–45% of the 193 open deals are likely older than 180 days based on the May–June 2025 creation surge. Ghost deals in Qualify (currently 158 deals) inflate the pipeline count and mask the true working inventory of approximately 35 active deals. Reps and leadership are making decisions based on a pipeline number that does not reflect real opportunity.

Effort: Low-medium (one query + workflow or bulk action).

Expected Impact: Open deal count immediately reflects true working pipeline. Rep focus concentrates on real opportunities. Pipeline coverage ratio becomes accurate.

Success Metric: After cleanup, <5% of open deals are older than 180 days.

P1.3 — Audit and fix the renewal workflow trigger property

What: Inspect "Create Renewal Deals" and "Contract entering renewal period" workflows. Identify the exact property that triggers deal creation (likely a contract end date or renewal date custom field). Check the fill rate on that property. If fill rate is low, identify all Customer-stage contacts (after P0.3 is fixed) and manually create renewal deals for customers missing a renewal deal.

Why: 29 renewal deals is not credible for any active customer base. If the trigger property has 10–20% fill, the renewal workflow fires for 10–20% of customers — leaving 80–90% without renewal tracking in HubSpot. This is NRR visibility disappearing into unstructured process.

Effort: Low (investigation) + Medium (if bulk deal creation is needed).

Expected Impact: Renewal deal count increases toward customer count. NRR tracking becomes possible once amounts are enforced.

Success Metric: Renewal deal count within 25% of total identified customer count within 60 days.

P1.4 — Activate expansion deal creation trigger

What: Define what constitutes an expansion event for Acme SaaS (additional units/doors added, new property, additional service module). Build a workflow: when a contact lifecycle stage = Customer AND units/doors increases by ≥ 1 → create a deal in the Account

Expansions pipeline. Train reps to create expansion deals manually when triggered by customer conversations while the workflow is being built.

Why: 7 expansion deals across a company of Acme SaaS's stage is not credible. Expansion revenue is occurring but not visible in HubSpot. Without tracking, NRR cannot be calculated, expansion forecasting is impossible, and CS accountability for upsell is untraceable.

Effort: Medium (define trigger, build workflow, rep training).

Expected Impact: Expansion deal creation begins accumulating. Within 60 days, expansion pipeline provides first meaningful signal of NRR motion.

Success Metric: 20+ expansion deals created within 60 days of workflow activation.

P1.5 — Implement lead status tracking for active pipeline contacts

What: Create a workflow: when contact is created via form or deal association → set lead status = "New." Enable the two disabled lead status sync workflows (Unqualified → lead status, No Longer with Company → lead status) after fixing their lifecycle stage triggers. Train SDRs to progress lead status through New → Contacted → Connected → Qualified/Unqualified as part of their standard workflow.

Why: 90.1% of contacts have no lead status. The SDR-to-AE handoff is invisible in HubSpot. Without lead status, sales cannot distinguish worked contacts from unworked ones, management cannot measure outreach efficiency, and the pipeline has no qualification checkpoint before deals are created.

Effort: Low-medium (workflow builds + SDR training).

Expected Impact: Within 60 days, lead status fills for new contacts entering the system. Qualification-based segmentation becomes possible. SDR activity becomes measurable.

Success Metric: 50% of contacts with an owner have a non-null lead status within 60 days.

P2: Medium-Term — Months 2–3 (Days 31–90)

These items build the reporting infrastructure and clean the data model.

P2.1 — Fix source attribution on new contacts

What: Add UTM parameter capture to all active HubSpot forms: add hidden fields for `utm_source`, `utm_medium`, `utm_campaign` and map to `hs_analytics_source_data_1` and `hs_analytics_source_data_2`. Update the "Stamp: Inbound Web Form Lead Source" workflow to also copy the source channel to a reportable field. Accept that the historical 95.3% attribution gap cannot be retroactively fixed — focus on 100% going forward.

Why: 95.3% of the 23,801-contact database has no source attribution. The organic search signal (1,000 contacts, 68 customers) is real but unrepresentative. Marketing channel ROI cannot be measured. CAC by channel is impossible. Board-level questions about which channels are driving pipeline have no answer.

Effort: Medium (form updates + workflow modification).

Expected Impact: All new contacts arriving via form have source attribution from the date of implementation. Within 6 months, a meaningful attribution dataset begins building.

Success Metric: 95% of new contacts created after implementation have `hs_analytics_source` populated.

P2.2 — Assign owners to unowned contacts

What: Build a workflow for going-forward contact creation: when contact is created via form or deal creation → assign owner based on deal owner (if deal exists) or territory/round-robin logic. For the 12,247 existing unowned contacts: run a bulk assignment based on associated company ownership or geographic territory.

Why: 51.5% of contacts have no owner. Unowned contacts are invisible in rep performance reports, cannot be enrolled in rep-specific sequences, and receive no follow-up accountability. This is not a data quality problem — it is an accountability problem made invisible.

Effort: Low-medium (workflow + bulk assignment).

Expected Impact: Rep performance reporting covers the full database. Activity tracking becomes complete. SDR outreach accountability improves.

Success Metric: 80% of contacts have an owner within 60 days.

P2.3 — Retire and consolidate dead pipelines and properties

What:

- Retire Smart Maintenance Pilots (0 deals, misconfigured probabilities) and Product C – Contract Conversion (0 deals, 2 active stages) after confirming no disabled workflows reference their pipeline IDs.
- Archive the 59 custom contact properties at 0% fill that have no active workflows writing to them. Present the list to Acme SaaS admins for confirmation before archiving.
- Archive the 32 custom deal properties at 0% fill that serve only the 8 non-primary pipelines with near-zero deal volume.
- Evaluate and potentially merge the two Product C pipelines into a single track.

Why: 95% custom contact property orphan rate and 81% custom deal property orphan rate create schema clutter that slows record loading, confuses reps, and increases admin burden. Two unused pipelines add configuration complexity with zero analytical value.

Effort: Low (with admin confirmation step).

Expected Impact: Cleaner portal UX for reps. Reduced admin surface area. Faster record load. 20%+ reduction in active custom properties.

Success Metric: Custom property count reduced by ≥ 25 properties; 2 unused pipelines retired.

P2.4 — Validate and recalibrate stage probabilities

What: After deal amounts are enforced (P0.1–P0.2), run a win rate analysis: of all deals that have ever been in "Intake Form Sent" stage, what percentage closed won? Apply the same analysis to "Awaiting First Job" and the Product B pipeline's "Meeting Scheduled" stage. Adjust probabilities to match empirical win rates.

Proposed probability calibration (pending empirical validation):

Stage	Current	Proposed
Qualify	10%	10% — retain
Discovery & Needs Analysis	30%	25% — slight reduction
Solution Presentation & Pathing	40%	40% — retain
Intake Form Sent	70%	55% — pending validation
Awaiting First Job	90%	85% — slight reduction

Why: Stage probabilities are set points, not empirically derived. Miscalibrated probabilities produce a systematically distorted weighted pipeline once amounts are populated. A 70% probability at a stage that empirically converts at 50% overstates pipeline value by 40% for every deal in that stage.

Effort: Low (data pull + admin setting change).

Expected Impact: Weighted pipeline forecast becomes more accurate. Board and leadership confidence in pipeline numbers increases.

Success Metric: Stage probability for "Intake Form Sent" validated against historical win rate with empirical data within 30 days of amounts being available.

P2.5 — Rename operationally-named deal stages

What: In the primary pipeline, rename "Intake Form Sent" to "Agreement Submitted." In the Product B pipeline, rename "Handoff" to "Operations Onboarding."

Why: Stage names describe internal rep actions, not buyer milestones. "Intake Form Sent" suggests the rep sent a form — it says nothing about whether the buyer completed it or made a commitment. Buyer-centric stage names improve rep comprehension, report interpretability, and the clarity of probability as a signal.

Effort: Low (admin setting change; does not affect stage IDs, existing deals, or automation).

Expected Impact: Improved rep understanding of what each stage represents. Better report readability for leadership.

Success Metric: Stage names updated within 7 days; no automation errors (confirm via workflow test run).

P2.6 — Build four standard reporting dashboards

What: Once Recommendations P0 and P1 are complete, build the four missing standard dashboards:

1. **Pipeline Health Dashboard:** Deal count by stage and by pipeline; monthly velocity trend; close date distribution; stalled deal count by rep.
2. **Rep Leaderboard:** Deals created, deals advanced, activities logged, Closed Won count — by rep and by month.
3. **Lifecycle Funnel Dashboard:** Contact count at each lifecycle stage; conversion rate between stages; lead source breakdown.
4. **Renewal/Expansion Pipeline:** Open renewal deals with close date; expansion opportunities by stage; deal count per rep.

Note: Dashboards 1 and 2 can be built immediately with deal count as the KPI. Dashboards 3 and 4 require P0.3 (Customer lifecycle fix) and P1.1 (lifecycle automation rebuild) to be completed first.

Why: Currently, 8 of 10 standard revenue reports cannot be produced from this portal. The data needed to produce the 2 that can work today (pipeline by count, activity metrics) exists but is not organized into visible dashboards for leadership.

Effort: Medium (dashboard configuration; fields become available after P0/P1 work).

Expected Impact: Leadership gains real-time visibility into pipeline health, rep performance, and demand funnel for the first time.

Success Metric: 4 dashboards published and reviewed in weekly sales and marketing review within 90 days.

P2.7 — Standardize deal naming convention

What: Define and enforce a naming convention: `[Company Name] - [Motion Type] - [YYYY-MM]` (e.g., "Acme Properties – New Business – 2026-03"). Update the "New Lead Deal Creation" workflow to apply this template using company name and create date tokens. Document the convention in the dealname property description in HubSpot. Apply going forward; do not rename existing deals.

Why: Without consistent naming, deduplication of deals for the same company is manual and error-prone. Search by deal name is unreliable. Rep self-service reporting on specific

accounts requires knowing the exact name.

Effort: Low (workflow update + documentation).

Expected Impact: New deals are consistently named from the date of enforcement.
Account-level reporting becomes reliable.

Success Metric: 90% of deals created after enforcement follow the convention (verified by spot check on 20 most recent deals 30 days post-implementation).

7. Appendix: Data Summary Tables

A. Portal-Wide Counts (Live API, 2026-03-09)

Metric	Value	Source
Total contacts	23,801	Live API
Total deals	1,837	Live API
Total pipelines	9	Live API
Total active workflows	61	Live API
Total disabled workflows	27	Live API
Total custom deal properties	62	Live API
Total custom contact properties	62	Live API
Contact lists	160	Portal metadata

B. Lifecycle Distribution (Live API, 2026-03-09)

Stage	Count	%
Lead	14,384	66.0%
No Stage	4,462	20.5%
Opportunity	2,498	11.5%
Subscriber	364	1.7%
Custom (58539676)	45	0.2%
Other	25	0.1%
MQL	14	0.06%
SQL	1	0.004%
Customer	0	0.0%
Total	23,793	

C. Deal Distribution by Pipeline (Live API)

Pipeline	Deals	%
New Business – Qualification & Core	1,685	91.8%
New Business – Core Boost	51	2.8%
Partnerships	37	2.0%
Account Renewals	29	1.6%
Product B	23	1.3%
Account Expansions	7	0.4%
Product C – Pilot Agreement	4	0.2%
Smart Maintenance Pilots	0	0.0%
Product C – Contract Conversion	0	0.0%
Total	1,837	100%

D. Primary Pipeline — Open Deal Stage Distribution (Live API)

Stage	Probability	Open Deals	% of Open
Qualify	10%	158	81.9%
Discovery & Needs Analysis	30%	21	10.9%
Solution Presentation & Pathing	40%	7	3.6%
Intake Form Sent	70%	4	2.1%
Awaiting First Job	90%	3	1.6%
Total Open	—	193	100%

E. Win Rate (Live API)

Metric	Value
Closed Won (all pipelines)	369
Closed Lost (all pipelines)	1,124
Win Rate	24.7%

F. Key Field Fill Rates

Field	Object	Fill Rate
Deal Owner	Deal	100%
Close Date	Deal	98%
Deal Type	Deal	72%
Deal Amount	Deal	0%
Lifecycle Stage	Contact	~81%
Contact Owner	Contact	48.5%
Lead Status	Contact	9.9%
Original Source	Contact	~4.7%
Custom Deal Properties (Tier 1)	Deal	3% of 62 properties
Custom Contact Properties (Tier 1)	Contact	5% of 62 properties

G. Contact Creation Velocity (Live API)

Month	Contacts Created
May 2025	1,130
June 2025	1,502
July 2025	640
August 2025	285
September 2025	221
October 2025 – March 2026	Not captured

H. Reporting Readiness Summary

Report	Today	After Amount Fix	After Full Fix
Pipeline by Stage (count)	YES	YES	YES
Activity Metrics	YES	YES	YES
Pipeline by Stage (value)	FAIL	YES	YES
Revenue Forecast	FAIL	YES	YES
Rep Performance (activity)	PARTIAL	PARTIAL	YES
Rep Performance (revenue)	FAIL	YES	YES
Lead Source Attribution	FAIL	FAIL	YES
Marketing-to-Sales Funnel	FAIL	FAIL	YES
Renewal Pipeline	FAIL	FAIL	YES
Expansion Pipeline	FAIL	FAIL	YES
Total Producible	2 / 10	5 / 10	9 / 10

I. Prioritized Action Summary

Priority	Action	Effort	Timeline	Impact
PO.1	Re-enable deal amount formula workflow	Low-Med	Day 1–3	Unblocks 5 reports
PO.2	Require deal amount at stage progression	Low	Day 1	Enforces PO.1 permanently
PO.3	Fix Customer lifecycle stage on Closed Won	Low	Day 1–3	Unblocks renewal + expansion tracking
PO.4	Build deal stall detection workflow	Low	Day 3–7	Cleans pipeline; creates accountability
P1.1	Rebuild lifecycle progression workflows	Med	Week 2–4	Restores MQL/SQL funnel
P1.2	Run aging query and cleanup sprint	Low-Med	Week 2–3	Cleans ghost deal backlog
P1.3	Fix renewal workflow trigger property	Low + Med	Week 2–4	Increases renewal deal count
P1.4	Activate expansion deal creation	Med	Week 2–4	Starts NRR tracking
P1.5	Implement lead status tracking	Low-Med	Week 2–4	SDR accountability
P2.1	Fix source attribution on new contacts	Med	Month 2	Marketing attribution

P2.2	Assign owners to unowned contacts	Low-Med	Month 2	Rep performance reporting
P2.3	Retire dead pipelines and properties	Low	Month 2	Portal hygiene
P2.4	Recalibrate stage probabilities	Low	Month 2–3	Forecast accuracy
P2.5	Rename operational stage names	Low	Month 2	Rep clarity
P2.6	Build standard reporting dashboards	Med	Month 2–3	Executive visibility
P2.7	Standardize deal naming convention	Low	Month 2	Reporting reliability

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(Acme SaaS) Source assessments: pipeline-definition-assessment.md, lifecycle-assessment.md, deal-velocity-assessment.md, field-usage-assessment.md*