PipelineSync

FREE TEMPLATE · GOVERNANCE

HubSpot Governance Checklist

A 47-point checklist for permissions, data, naming, automation, integrations and reporting. Score every point, name an owner, and keep the portal understandable and safe as it grows.

47-point checklist | Scoring summary | Property catalog | Change control

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Fillable PDF · pipelinesync.net/resources

START HERE

How to use this template

Governance is the set of rules that keeps a portal understandable and safe as it grows: who can access and change what, how properties and assets are named and owned, how data is validated, and how automation, integrations and reports are reviewed. This template turns them into 47 points to score, own and re-check.

1 Name the owners
Fill in the roles and ownership worksheet first, so every section has a named owner (page 10).

2 Score all 47 points
Mark each point Done, Partly done or Not done, with an owner, the date checked and notes (pages 7 to 9).

3 Count per section
Write the section scores into the scoring summary to see where the next problem will come from (page 9).

4 Fix in order
Access first, then data, then automation, then the rest. Plan the fixes on the quarterly review (page 15).

5 Control changes
Use the change-control request for every change to live assets, and log it when it goes live (pages 12 and 13).

6 Review every quarter
Re-run the checklist, compare with the last copy and keep each one, so you can see whether the portal is getting healthier (page 15).

What is inside

Page	Section	Use it to
03	**Reference: the seven areas**	See what each section protects and how to score it
04	**Reference: HubSpot controls**	Check which HubSpot features help, and which plan they need
05	**Naming conventions and review rhythm**	Agree naming patterns and a weekly to quarterly routine
06	**Worked example**	See a scored section, summary and fix plan
07–09	**The 47-point checklist and score**	Score every point with owner, date and notes, then total each section
10	**Roles and ownership**	Name the portal owner and the owner of each area, with a backup
11	**Property catalog**	Record every custom property with its definition and owner
12	**Change-control request**	Request, test and approve a change before it is made
13	**Change log**	Record what changed, when, by whom, why and how to undo it
14	**Connected apps and troubleshooting**	List integration owners and trace common problems
15	**Quarterly review**	Compare scores with last quarter, plan fixes, sign off

Tip: Every worksheet is fillable: type into the boxes in Adobe Acrobat Reader, Preview or your browser, or print it. The same 47 points are also available as a spreadsheet with a score dropdown on the template page at pipelinesync.net.

REFERENCE

What a HubSpot governance checklist covers

A HubSpot governance checklist covers seven areas: access and permissions, the data model and properties, data quality and validation, naming conventions, automation, integrations, and reporting. Each item has an owner and a review rhythm, so the portal stays understandable and safe as more people and processes depend on it.

The seven sections

Section	Points	What it protects	Checked
Access and permissions	01–08	Who can see, export, delete and change things	Monthly
Data model and properties	09–18	One defined, owned property for each concept	Monthly and quarterly
Data quality and validation	19–24	Clean formats, no duplicates, controlled imports	Weekly and quarterly
Naming conventions	25–30	Assets anyone can understand from the name	Monthly and quarterly
Automation	31–37	Owned workflows that don't fight each other	Weekly and quarterly
Integrations	38–42	Field ownership and sync errors someone sees	Weekly and quarterly
Reporting and review	43–47	Dashboards leadership can trust	Monthly and quarterly

The checklist pages mark the points to check weekly (W) and monthly (M). Every point is checked in the quarterly review.

How a review runs

01 **Assign owners** — One per section

02 **Score** — Done, partly, not done

03 **Count** — Done items per section

04 **Fix in order** — Access, data, automation, rest

05 **Re-run** — Every quarter; keep the copy

How to score each point

Score	Meaning	What to do
Done	In place, owned and checked on schedule	Keep the review rhythm
Partly done	Exists, but not complete, written down or owned	Finish it within the quarter
Not done	Missing	Fix in order: access, data, automation, then the rest

Where the next problem comes from

Count the done items per section. A section with most items not done is where the next problem will come from, so fix it before adding anything new to the portal.

Never checked the portal?

Start with a HubSpot audit to find out where the portal stands, then come back to this checklist. The audit checklist is free at pipelinesync.net/resources.

REFERENCE · CHECKED OCTOBER 2026

HubSpot controls that support governance

Most of the checklist is about owners and habits, but several HubSpot features make the rules easier to keep. Some are on every plan; others need Professional, Enterprise or Data Hub. Check your plan before you decide how to meet a point.

HubSpot control	What it does (as of October 2026)	Plan	Points
Permission sets and templates	Define permissions per role	Sets: Enterprise; templates: Professional	02
Property view and edit access	Super Admins limit who can view or edit a property. HubSpot says it is not a security measure: the API and some record creation paths can still set the value.	Enterprise	17
Validation rules	Limit text, number, phone and date properties, for example by length, range or future dates only	All plans	13, 19
Regular-expression rules	Validate formats such as IDs and postcodes with a pattern	Professional or Enterprise	19
Required properties on the create form	Make a property required when a record is created by hand	Starter and above	14
Unique value properties	Stop the same ID being stored twice; up to ten per object	Check your plan	16, 22, 41
Data quality tool	Shows duplicates, formatting issues and property insights (empty, unused or duplicate properties)	Starter and above	11, 12, 19
Duplicate review	Review suggested duplicates one pair at a time	Professional and above	21
Bulk duplicates, formatting rules, digest	Bulk duplicate management, automatic formatting fixes, the Format data workflow action, anomaly alerts and a weekly data quality digest	Data Hub Professional or Enterprise	19, 21, 24
Custom objects	Objects for things with their own records and lifecycle	Enterprise	15

Email deduplicates contacts and company domain deduplicates companies, so require both (points 20, 22). HubSpot now names Operations Hub as Data Hub.

Monthly data quality routine

01 **Review** — Duplicates and formatting issues

02 **Merge and fix** — Note which entry point caused it

03 **Check properties** — Empty, unused or duplicated

04 **Audit entry points** — Imports, forms, integrations

05 **Update the rules** — Validation and required fields

Where validation rules don't apply

Rules apply when editing records, in imports and in updated forms, but not in workflows, chatflows, meeting pages or legacy forms, and don't change existing values.

What HubSpot already records

HubSpot keeps its own history, such as property history on records. Your change log adds what HubSpot can't know: why the change was made (point 37).

STANDARDS

Naming conventions and review rhythm

A good convention tells you what an asset does and who it belongs to from its name alone. The exact pattern matters less than using one pattern everywhere. Publish it next to this checklist, and fix names as you touch assets rather than renaming everything at once.

Asset	Pattern	Example	Your pattern
Workflow	Team · Object · What it does	Sales · Deal · Create onboarding ticket at Closed won	
List or segment	Team · Object · Who is in it	Marketing · Contact · Webinar attendees not yet MQL	
Report	Team · Metric · Breakdown	Sales · Pipeline created · By source and month	
Property	Plain label; internal name that won't need changing	"Primary use case" with internal name primary_use_case	
Test asset	Prefix TEST and a date	TEST 2026-10 · Lead routing v2	
Other			

Rules worth adopting

- [ ] Team names agreed and spelled one way
  Sales, Marketing, Service, RevOps
- [ ] Internal names chosen to last
  Labels can change; internal names shouldn't need to
- [ ] Test assets carry TEST and a date
  Easy to find and archive (point 29)
- [ ] Old assets archived, not left active
  Point 30

Review rhythm

When	What to check	Points	Who	Day or date
Weekly	Duplicates, workflow errors, sync errors, data quality exceptions	`21, 24, 34, 40`		
Monthly	New and departed users, permissions, unused properties, lists and dashboards	`1–8, 12, 30, 46`		
Quarterly	All 47 points, scored and compared with the last review	`1–47`		
After a change	Migration, new integration, new team or major rebuild	Affected sections		

A short weekly check prevents most of the clean-up a quarterly review would otherwise find.

Conventions published at	
Agreed by / date	

WORKED EXAMPLE · ILLUSTRATIVE

A first quarterly review

An illustrative first review for an example portal. The scores, owners and notes are made up; the point is how a scored section turns into a short, ordered fix plan.

Access and permissions, scored checked 2026-10-27

#	Checklist point	Score	Owner	Notes
01	Super admins limited to the people who own the portal	Done	Portal owner	Two super admins
02	Permissions defined per role	Partly done	Portal owner	Sales role set up; Service not yet
03	Teams match the real reporting structure	Done	Portal owner	
04	Export rights limited by role	Done	Portal owner	
05	Bulk delete rights limited by role	Partly done	Portal owner	Marketing role still has it
06	Departed users deactivated within a day	Not done	Portal owner	Add to offboarding checklist
07	Records of departed users reassigned	Done	Sales ops	
08	Access tested with a normal user account	Done	Portal owner	Tested as Test user, Sales role

Section score: Done 5 of 8 · Partly done 2 · Not done 1

Scoring summary

Section	Done	Partly	Not	% done
Access	5 / 8	2	1	63%
Data model	4 / 10	3	3	40%
Data quality	2 / 6	2	2	33%
Naming	3 / 6	1	2	50%
Automation	3 / 7	2	2	43%
Integrations	2 / 5	1	2	40%
Reporting	3 / 5	1	1	60%
Total	**22 / 47**	**12**	**13**	**47%**

What the scores say

- **Access first:** only one not-done point, but everything else depends on who can change what.
- **Data quality is weakest** at 33%, so that is where the next problem will come from.
- **Nothing new is added** until access and data are fixed.
- **Next review** compares each section with these numbers.

Fix plan, in order

#	Finding	Group	Points	Owner	Due
1	Departed users still active	Quick win	06	Portal owner	This week
2	No weekly duplicate review; imports have no matching key	Structural fix	21, 22	RevOps lead	This quarter
3	Two workflows set Lead status	Structural fix	33	Marketing ops	This quarter

CHECKLIST · POINTS 1 TO 18

Access, data model and properties

Tick one score per point: **D** Done, **P** Partly done, **N** Not done. Name the owner, write the date you checked it and add notes. Fix not-done points in order: access, data, automation, then the rest.

#	Checklist point	D	P	N	Owner	Date	Notes
Access and permissions 8 POINTS							
01	Super admins limited to the people who own the portal M	☐	☐	☐			
02	Permissions defined per role (permission sets on Enterprise, templates on Professional) M	☐	☐	☐			
03	Teams match the real reporting structure M	☐	☐	☐			
04	Export rights limited by role M	☐	☐	☐			
05	Bulk delete rights limited by role M	☐	☐	☐			
06	Departed users deactivated within a day M	☐	☐	☐			
07	Records of departed users reassigned M	☐	☐	☐			
08	Access tested with a normal user account, not an admin M	☐	☐	☐			
	Section score: Done _____ of 8 · Partly done _____ · Not done _____						
Data model and properties 10 POINTS							
09	Every custom property is in the property catalog	☐	☐	☐			
10	Each property has an owner and a one-line definition	☐	☐	☐			
11	No duplicate properties for the same concept	☐	☐	☐			
12	Unused properties archived M	☐	☐	☐			
13	Dropdowns used instead of free text where values repeat	☐	☐	☐			
14	Required properties set on forms and imports	☐	☐	☐			
15	Associations between objects documented	☐	☐	☐			
16	Record ID of source systems stored for imported data	☐	☐	☐			
17	Sensitive properties restricted to the roles that need them	☐	☐	☐			
18	Lifecycle stage and lead status definitions written down	☐	☐	☐			
	Section score: Done _____ of 10 · Partly done _____ · Not done _____						

CHECKLIST · POINTS 19 TO 37

Data quality, naming and automation

#	Checklist point	D	P	N	Owner	Date	Notes
Data quality and validation 6 POINTS							
19	Email, phone and country formats standardized	☐	☐	☐			
20	Company domains normalized	☐	☐	☐			
21	Duplicate review runs every week W	☐	☐	☐			
22	Imports require a matching key	☐	☐	☐			
23	Only trained users can import	☐	☐	☐			
24	Data quality exceptions have a named owner W	☐	☐	☐			
	Section score: Done _____ of 6 · Partly done _____ · Not done _____						
Naming conventions 6 POINTS							
25	Naming convention published for properties	☐	☐	☐			
26	Naming convention published for workflows	☐	☐	☐			
27	Naming convention published for lists and views	☐	☐	☐			
28	Naming convention published for reports and dashboards	☐	☐	☐			
29	Test and temporary assets clearly labeled	☐	☐	☐			
30	Old assets archived, not left active M	☐	☐	☐			
	Section score: Done _____ of 6 · Partly done _____ · Not done _____						
Automation 7 POINTS							
31	Every workflow has a named owner	☐	☐	☐			
32	Every workflow has a one-line purpose	☐	☐	☐			
33	No two workflows set the same property in conflict	☐	☐	☐			
34	Workflow errors reviewed each week W	☐	☐	☐			
35	Changes to live workflows tested on sample records first	☐	☐	☐			
36	Sequences and automated emails reviewed each quarter	☐	☐	☐			
37	A change log records what changed, when and why	☐	☐	☐			
	Section score: Done _____ of 7 · Partly done _____ · Not done _____						

CHECKLIST · POINTS 38 TO 47

Integrations, reporting and your score

#	Checklist point	D	P	N	Owner	Date	Notes
Integrations 5 POINTS							
38	Every connected app listed with its owner	☐	☐	☐			
39	Field ownership defined for each shared field	☐	☐	☐			
40	Sync errors alert a named person W	☐	☐	☐			
41	Integrations update on a stable external ID	☐	☐	☐			
42	Unused apps disconnected	☐	☐	☐			
	Section score: Done _____ of 5 · Partly done _____ · Not done _____						
Reporting and review 5 POINTS							
43	Dashboards leadership relies on are listed	☐	☐	☐			
44	Each key report has an owner who checks it	☐	☐	☐			
45	Report definitions match lifecycle and pipeline definitions	☐	☐	☐			
46	Unused dashboards archived M	☐	☐	☐			
47	Full governance review held every quarter	☐	☐	☐			
	Section score: Done _____ of 5 · Partly done _____ · Not done _____						

Scoring summary

Copy each section score from the checklist. % done is Done divided by Points. The lowest section is where the next problem will come from.

Section	Points	Done	Partly	Not done	% done	Owner	Fix order
Access and permissions	8						
Data model and properties	10						
Data quality and validation	6						
Naming conventions	6						
Automation	7						
Integrations	5						
Reporting and review	5						
Total	**47**						

Scored by		**Date**	

WORKSHEET

Governance roles and ownership

One portal owner is accountable for the whole checklist; named owners look after each area. Owners approve changes in their area, know why each asset exists, and are the person others ask before editing it.

Role	Owns	Typical person	Name	Backup
Portal owner	Access, the checklist, the quarterly review	RevOps or operations lead, or your HubSpot admin		
Property owners	Definitions and allowed values for their properties	The team that uses the field most, such as sales ops for deal fields		
Workflow owners	Purpose, testing and errors for their workflows	Whoever requested or built the workflow		
Integration owners	Field ownership and sync errors for each connected app	The admin, or the team that uses the app		
Report owners	Accuracy of the dashboards leadership uses	The manager who presents the numbers		

Section owners

Section	Owner	Backup	Owner since
Access and permissions 01–08			
Data model and properties 09–18			
Data quality and validation 19–24			
Naming conventions 25–30			
Automation 31–37			
Integrations 38–42			
Reporting and review 43–47			

When an owner leaves

- ☐ User deactivated within a day — Point 06
- ☐ Their records reassigned — Point 07
- ☐ Governance items reassigned — Update this page

DONE FOR YOU

No internal CRM owner?

Ongoing HubSpot administration keeps governance running: workflow changes, reporting updates, data hygiene and user support, every month.

Book a free consultation

WORKSHEET

Property catalog

One row per custom property. Before anyone creates a property, they check the catalog; that single habit prevents most duplicate fields (points 9 to 17).

Internal name	Label	Object	Type	Allowed values	Definition (one line)	Owner	Required	Restricted	Status
lead_source_detail	*Lead source detail*	*Contact*	*Dropdown*	*The agreed list, no free text*	*Where this lead first came from, at campaign level*	*Marketing operations*	*Yes, forms and imports*	*No*	*Active*

Status: Active, Under review, To archive, Archived. Restricted: view or edit limited to certain roles (point 17). For IDs from other systems, note whether the property is a unique value property (point 16).

WORKSHEET · COPY FOR EACH CHANGE

Change-control request

For any change to a live asset: the area owner approves it, it is tested first, then logged on page 13.

Request ID	CR-_____	**Date requested**	
Requested by		**Needed by**	
Asset type	☐ Property ☐ Workflow ☐ Permission ☐ Integration ☐ Report ☐ Segment ☐ Other		
Asset name			

Change requested

Reason: the request or problem behind it

Impact

Properties it changes	
Workflows that react to it	
Reports and dashboards	
Integrations that sync it	
Checklist points affected	
Records to update	☐ Property catalog ☐ Naming pattern ☐ Owners page ☐ None

Test and rollback

How it will be tested e.g. sample records first	
Test result	☐ Pass ☐ Fail Notes: _____
How to undo it	

Approved by area owner		**Date**	
Made live by		**Date**	
Logged in change log	☐ Yes, on page 13	**Log row date**	

WORKSHEET

Change log

One row per change to live properties, workflows, permissions, integrations or reports. When a number in a report suddenly moves, this log is usually the fastest way to find out why.

Date	Person	Asset type	Asset	Change	Reason / request	How it was tested	Rollback	Request
2026-10-27	*RevOps lead*	*Workflow*	*Sales · Deal · Create onboarding ticket at Closed won*	*Added ticket owner rotation*	*Onboarding team asked for even distribution*	*Five sample deals moved to Closed won*	*Revert to previous version in revision history*	*CR-001*

Asset type: Property, Workflow, Permission, Integration, Report, Segment, Other. Request: the change-control request ID from page 12.

WORKSHEET AND TROUBLESHOOTING

Connected apps and when governance slips

Connected apps register

Every connected app with its owner, the fields it owns, the ID it updates on and who hears about sync errors (points 38 to 42).

App	Owner	Reads / writes	Fields it owns	External ID	Errors alert	Still used?
Billing system	*Finance ops*	*Writes company billing fields*	*Billing status*	*Billing account ID*	*Integration owner*	*Yes*

Troubleshooting

Symptom	Likely cause	Check points
Values change "randomly"	Two systems or two workflows overwriting the same property	33, 39
Duplicates keep coming back	Imports or integrations without a stable key; email or domain not required	16, 22, 41
Two reports disagree	Report definitions don't match lifecycle or pipeline definitions	18, 45
A number suddenly moved	A recent change to a property, workflow or report	37, change log
Nobody can explain a workflow	No named owner or purpose; switch it off in a controlled way, don't delete it	31, 32
A sync failed unnoticed	Sync errors don't alert a named person	40
Several fields for one fact	Properties created without checking the catalog	09, 11

Your notes

Date	What happened	Cause and fix	Points

WORKSHEET · ONCE A QUARTER

Quarterly governance review

Quarter		**Review date**	
Led by		**Attended by**	

Scores compared with last quarter

Section	Points	Done last quarter	Done this quarter	Change	Comment
Access and permissions	8				
Data model and properties	10				
Data quality and validation	6				
Naming conventions	6				
Automation	7				
Integrations	5				
Reporting and review	5				
Total	**47**				

Before you sign off

- ☐ All 47 points scored with an owner and date
  Pages 07 to 09
- ☐ Every change this quarter is in the log
  Page 13
- ☐ Owners page still current
  Page 10; reassign anyone who left
- ☐ Last quarter's copy kept for comparison
  So you can see the trend

Fix plan

Finding	Group	Points	Owner	Due	Done
					☐
					☐
					☐
					☐
					☐

Group: Quick win (this week), Structural fix (needs design first), Stop doing. Order: access, data, automation, then the rest.

Signed off by		**Next review**	

PipelineSync

HUBSPOT GOLD SOLUTIONS PARTNER

Want governance run for you?

We score the 47 points with you, fix what is not done in the right order, and keep the review rhythm going, so the portal stays understandable and safe as it grows.

Ongoing HubSpot administration

Monthly support for teams without an internal CRM owner: workflow changes, reporting updates, data hygiene and user support.

HubSpot audit

A structured review of your portal, data, automation and reporting, delivered as a written findings document with prioritized recommendations.

CRM cleanup and data quality

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