

HubSpot Revenue Leak Audit

Find where pipeline, follow-up, handoffs, CRM data, reporting, and automation are breaking down.

WHAT WE REVIEW

- Pipeline stages, aging, close-date hygiene, and stale opportunities
- Follow-up consistency, response-time gaps, and missing next steps
- Key Deal, Contact, and Company fields affecting reporting and execution
- Ownership and handoff boundaries across sales, operations, and systems
- Workflow, automation, integration, and reporting friction

WHAT YOU RECEIVE

- Revenue Leak Control Report with evidence-backed findings
- Top 3-5 priority leaks and recommended fixes
- Current-state workflow / ownership observations
- Automation and integration opportunities
- 30-day remediation roadmap + optional implementation scope

REMOTE AUDIT INPUTS

Preferred: limited HubSpot viewer access plus a 30-45 minute stakeholder walkthrough.

- Deals, Contacts, Companies, pipelines, properties, workflows, and reports relevant to the review
- Sales process / funnel explanation and current pain points
- Optional SOPs, workflow exports, screenshots, forms, and tool map
- No-access option: screen share + exports + screenshots + questionnaire

AUDIT BOUNDARIES

- No production changes during the audit without approval
- No credential sharing through email or documents
- Implementation is scoped separately after findings are reviewed

FOUNDING CLIENT OFFER

\$750 fixed scope

First 3 external clients | 5 business day turnaround

Planned standard price after validation: \$1,250

REQUEST THE AUDIT | contact@jmmultiservices.xyz