HubSpot Cleanup Demo: Fixing a Messy CRM

Demo project on sample data, not a client engagement

THE PROBLEM

The sample CRM was set up to look like a typical small-team HubSpot account that grew without rules. It had duplicate contacts and companies, lead source values spelled several different ways, lifecycle stages that disagreed with deal status, open deals sitting past their close date, and no pipeline view to see any of it.

WHAT CLEAN BREAK DID

- **Imported messy sample data.** Loaded 46 companies, 120 contacts and 60 deals of intentionally messy data into a free HubSpot sandbox.
- **Merged duplicates.** Merged duplicate contacts (114 to 107 contacts). Deduped companies by domain (46 to 42).
- **Standardized lead source.** Cleaned lead source on contacts and deals down to six values: Webinar, Referral, Trade Show, Website, Outbound, Partner. Before cleanup, 59 contact rows had inconsistent spellings.
- **Corrected lifecycle stages.** Reset 30 "Customers" at companies with no closed-won deal to Opportunity. Moved 15 subscribers and leads at companies with a closed-won deal to Customer.
- **Fixed stale deals.** Rescheduled 13 open deals with a close date before 10/28/2026 to 12/15/2026.
- **Tracked the gaps.** Saved a "Needs review - missing email" view (10 contacts) so missing data stays visible.
- **Built a pipeline view.** Created a "Pipeline Health (Demo)" dashboard: deal stage overview, deals by source, closed revenue by source, revenue by stage, and a sales forecast by stage.

BEFORE AND AFTER

Before

Company Name	Lifecycle Stage	Lead Source
Willowbrook Retail	Customer	website
Amberfield Agritech	Customer	Referal
Fernwood Biotech	Lead	Referral
Driftwood Games	Subscriber	Referral
Quillstone Media	Opportunity	Partner
Lumenfold Design	Opportunity	Website
Fernwood Biotech	Subscriber	Cold Outreach
Nimbus Ledger Fintech	Evangelist	WEBINAR
Lakeshore Realty Group	Customer	--
Amberfield Agritech	Opportunity	Cold outreach
TIDEWATER ROBOTICS	Marketing Qualified Lead	partner

114 contacts

114 contacts with mixed lead source spellings (website, Referal, WEBINAR, Cold outreach). Columns cropped for readability.

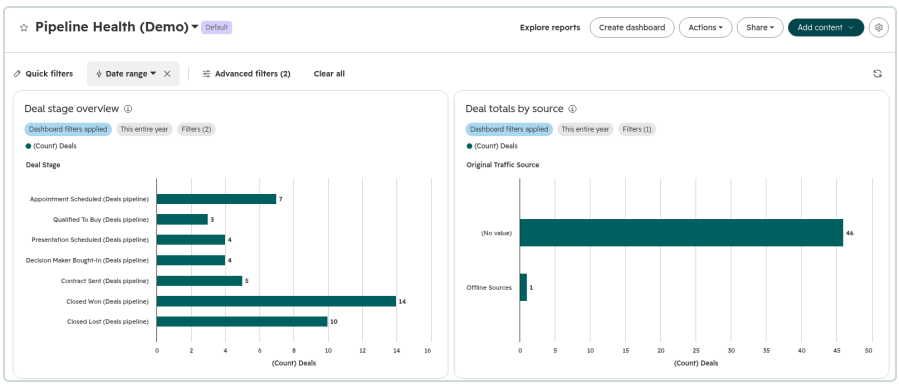
After

Company Name	Lifecycle Stage	Lead Source ↑
Lakeshore Realty Group	Opportunity	--
Opaline Apparel	Sales Qualified Lead	--
Opaline Apparel	Customer	--
Opaline Apparel	Customer	--
HubSpot	Opportunity	--
HubSpot	Lead	--
Fernwood Biotech	Customer	Outbound
Amberfield Agritech	Opportunity	Outbound
Ironleaf Capital	Customer	Outbound
Foxglove Wellness	Sales Qualified Lead	Outbound
Harborview Insurance	Opportunity	Outbound

107 contacts

107 contacts after merges, with lead source standardized (blank values sort first). Columns cropped for readability.

After



"Pipeline Health (Demo)" dashboard in the HubSpot sandbox (top row of reports shown).

Limits of this demo

This was done on the free HubSpot plan, so duplicate merging was done by hand. Some items were left for review rather than forced: deal-to-company associations, a handful of lifecycle stragglers, and 8 deals with no amount. In a real engagement, this is the review list Clean Break would hand back to the team.