

## HUBSPOT FIX REPORT

# NorthPeak Heating & Air CRM Fix Report

This report documents the practical CRM clean-up work completed after the audit. It focuses on visible data consistency improvements, ownership repair, and record-level validation across contacts, companies, and deals.

## SYSTEM

**HubSpot CRM**

## CASE TYPE

**CRM hygiene and  
process repair**

## EVIDENCE

**9 annotated  
screenshots**

## Report structure

- Context and completed scope
- Step-by-step fix evidence
- Record-level validation
- Outcome summary

## Bottom line

The CRM moved from a messy but workable before-state toward a cleaner, more dependable operating base. This document focuses on the repair actions completed and the evidence captured after each action.

# Project overview

## Case context

**Company:** NorthPeak Heating & Air

**Industry:** Residential HVAC / home services

**Core objects:** Contacts, companies, and deals in HubSpot CRM

**Reason for work:** The audit identified mixed field formats, inconsistent visible record hygiene, and missing ownership across companies and deals.

**Goal of this phase:** Make the CRM more dependable for follow-up, accountability, and day-to-day use by cleaning the visible operating surface first.

## Work completed

- Contact country values aligned to one standard
- Contact phone numbers rewritten into one visible format
- Contacts table cleaned to reduce obvious inconsistency
- Company table key fields standardised
- Company owners assigned across visible records
- Deal owners assigned across visible records
- Cleaned company, deal, and contact records validated at record level

## Immediate outcome

The CRM surface shown in the evidence screenshots became cleaner, more consistent, and easier to trust operationally.

## What this report proves

The report shows completed fix evidence rather than planned changes, which makes the work more credible and easier to review.

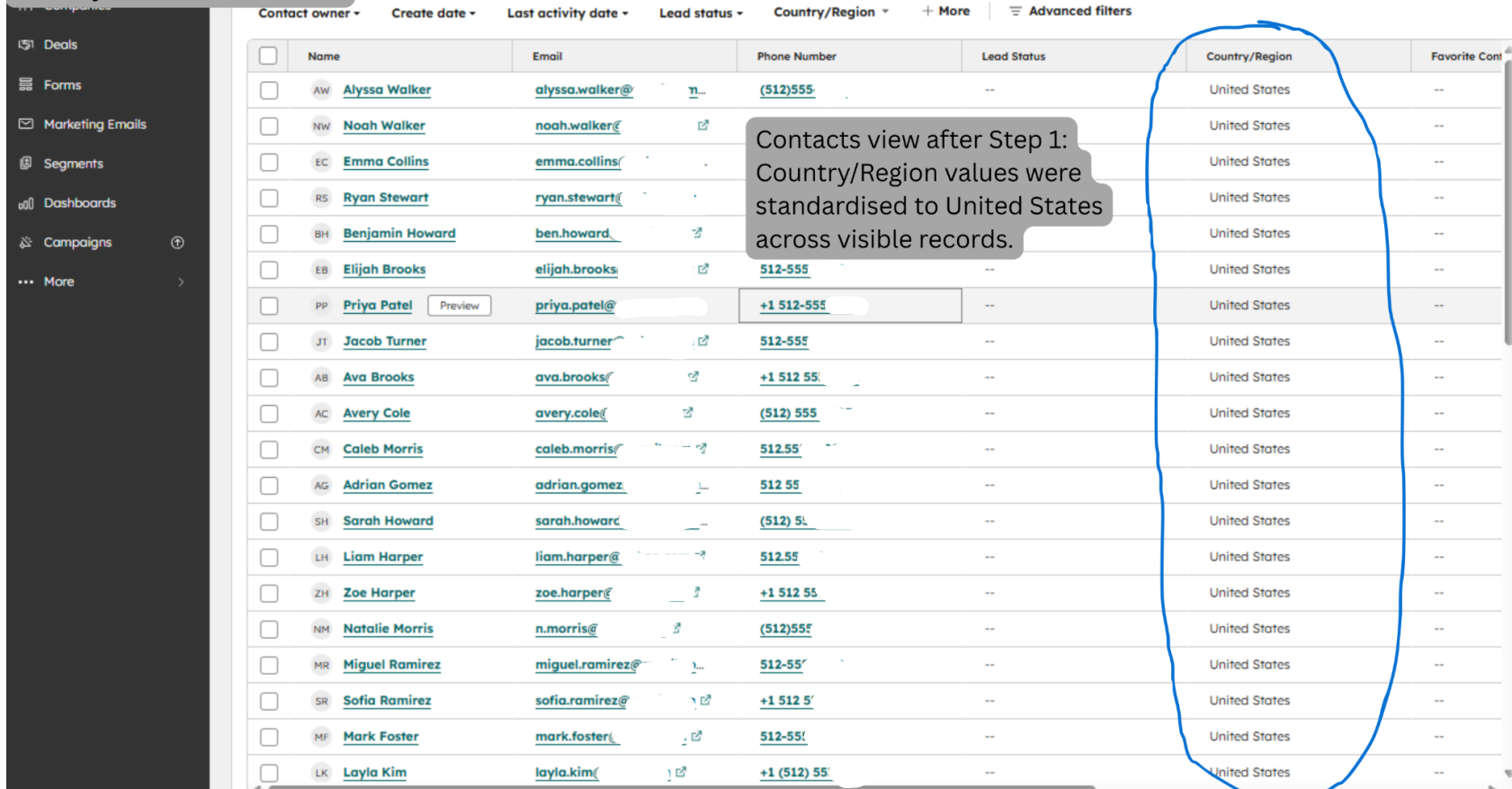
## Phase status

This report documents the completed CRM review, cleanup, ownership repair, and record-level validation delivered in this phase.

# Step 1 - Standardise contact country values

Visible Country/Region values in the contacts table were aligned to a single standard so filtering, segmentation, and reporting would no longer depend on mixed country labels.

Step 1 completed - Contact country values standardised



Contacts view after Step 1: Country/Region values were standardised to United States across visible records.

	Name	Email	Phone Number	Lead Status	Country/Region	Favorite Cont
<input type="checkbox"/>	AW <a href="#">Alyssa Walker</a>	<a href="mailto:alyssa.walker@">alyssa.walker@</a>	<a href="tel:(512)555">512)555</a>	--	United States	--
<input type="checkbox"/>	NW <a href="#">Noah Walker</a>	<a href="mailto:noah.walker@">noah.walker@</a>			United States	--
<input type="checkbox"/>	EC <a href="#">Emma Collins</a>	<a href="mailto:emma.collins@">emma.collins@</a>			United States	--
<input type="checkbox"/>	RS <a href="#">Ryan Stewart</a>	<a href="mailto:ryan.stewart@">ryan.stewart@</a>			United States	--
<input type="checkbox"/>	BH <a href="#">Benjamin Howard</a>	<a href="mailto:ben.howard@">ben.howard@</a>			United States	--
<input type="checkbox"/>	EB <a href="#">Elijah Brooks</a>	<a href="mailto:elijah.brooks@">elijah.brooks@</a>	<a href="tel:512-555">512-555</a>	--	United States	--
<input type="checkbox"/>	PP <a href="#">Priya Patel</a> <span>Preview</span>	<a href="mailto:priya.patel@">priya.patel@</a>	<a href="tel:+1-512-555">+1 512-555</a>	--	United States	--
<input type="checkbox"/>	JT <a href="#">Jacob Turner</a>	<a href="mailto:jacob.turner@">jacob.turner@</a>	<a href="tel:512-555">512-555</a>	--	United States	--
<input type="checkbox"/>	AB <a href="#">Ava Brooks</a>	<a href="mailto:ava.brooks@">ava.brooks@</a>	<a href="tel:+1-512-555">+1 512 555</a>	--	United States	--
<input type="checkbox"/>	AC <a href="#">Avery Cole</a>	<a href="mailto:avery.cole@">avery.cole@</a>	<a href="tel:(512) 555">512) 555</a>	--	United States	--
<input type="checkbox"/>	CM <a href="#">Caleb Morris</a>	<a href="mailto:caleb.morris@">caleb.morris@</a>	<a href="tel:512.555">512.555</a>	--	United States	--
<input type="checkbox"/>	AG <a href="#">Adrian Gomez</a>	<a href="mailto:adrian.gomez@">adrian.gomez@</a>	<a href="tel:512 55">512 55</a>	--	United States	--
<input type="checkbox"/>	SH <a href="#">Sarah Howard</a>	<a href="mailto:sarah.howard@">sarah.howard@</a>	<a href="tel:(512) 512">512) 512</a>	--	United States	--
<input type="checkbox"/>	LH <a href="#">Liam Harper</a>	<a href="mailto:liam.harper@">liam.harper@</a>	<a href="tel:512.555">512.555</a>	--	United States	--
<input type="checkbox"/>	ZH <a href="#">Zoe Harper</a>	<a href="mailto:zoe.harper@">zoe.harper@</a>	<a href="tel:+1-512-555">+1 512 555</a>	--	United States	--
<input type="checkbox"/>	NM <a href="#">Natalie Morris</a>	<a href="mailto:n.morris@">n.morris@</a>	<a href="tel:(512)555">512)555</a>	--	United States	--
<input type="checkbox"/>	MR <a href="#">Miguel Ramirez</a>	<a href="mailto:miguel.ramirez@">miguel.ramirez@</a>	<a href="tel:512-555">512-555</a>	--	United States	--
<input type="checkbox"/>	SR <a href="#">Sofia Ramirez</a>	<a href="mailto:sofia.ramirez@">sofia.ramirez@</a>	<a href="tel:+1-512-555">+1 512 555</a>	--	United States	--
<input type="checkbox"/>	MF <a href="#">Mark Foster</a>	<a href="mailto:mark.foster@">mark.foster@</a>	<a href="tel:512-555">512-555</a>	--	United States	--
<input type="checkbox"/>	LK <a href="#">Layla Kim</a>	<a href="mailto:layla.kim@">layla.kim@</a>	<a href="tel:+1-512-555">+1 (512) 555</a>	--	United States	--

# Step 2 - Standardise contact phone formatting

Phone numbers were rewritten into one consistent visible format to reduce visual noise and make the CRM easier to scan and trust.

Step 2 completed - Contact phone numbers standardised

Reviewed the Contacts table and cleaned phone-number formatting so records followed one consistent structure. Numbers were rewritten using a country-code-based format to reduce visual inconsistency and improve CRM hygiene before duplicate review.

	Name	Email	Phone Number	Country/Region	Create Date (GMT)
<input type="checkbox"/>	OK Owen Kim	owen.kim@	+1 (512) 5f		Today at 7:56 PM GMT
<input type="checkbox"/>	LK Layla Kim	layla.kim@	+1 (512) 5f		Today at 8:21 PM GMT
<input type="checkbox"/>	HC Henry Cole	henry.cole@	+1 (512) 5f		Today at 8:21 PM GMT
<input type="checkbox"/>	AC Avery Cole	avery.cole@	+1 (512) 5f		Today at 8:21 PM GMT
<input type="checkbox"/>	AC Avery Cole	avery.cole+servi	+1 (512) 5f		Today at 7:56 PM GMT
<input type="checkbox"/>	LH Liam Harper	liam.harper@	+1 (512) 5f	United States	Today at 8:21 PM GMT
<input type="checkbox"/>	ZH Zoe Harper	zoe.harp	+1 (512)	United States	Today at 8:21 PM GMT
<input type="checkbox"/>	CL Connor Lane	connor.lan	+1 (512)	United States	Today at 7:56 PM GMT
<input type="checkbox"/>	NS Nora Simmons	nora.simmon	+1 (512)	United States	Today at 8:21 PM GMT
<input type="checkbox"/>	EB Elijah Brooks	elijah.brookr	+1 (512) 5f	United States	Today at 8:21 PM GMT
<input type="checkbox"/>	AB Ava Brooks	ava.brooks@	+1 (512)	United States	Today at 8:21 PM GMT
<input type="checkbox"/>	TD Tyler Dixon	tyler.dixon@	+1 (512) 5f	United States	Today at 7:56 PM GMT
<input type="checkbox"/>	CD Chloe Dixon	chloe.dixon@	+1 (512)	United States	Today at 8:21 PM GMT
<input type="checkbox"/>	AG Adrian Gomez	adrian.gomez	+1 (512) 5f	United States	Today at 8:21 PM GMT
<input type="checkbox"/>	IG Isabella Gomez	isabella.gomez	+1 (512) 5f	United States	Today at 7:56 PM GMT
<input type="checkbox"/>	LP Lucas Price	lucas.price@	+1 (512) 5f	United States	Today at 8:21 PM GMT
<input type="checkbox"/>	MP Mia Price	mia.price@	+1 (512)	United States	Today at 7:56 PM GMT
<input type="checkbox"/>	BH Benjamin Howard	ben.howard	+1 (512)	United States	Today at 8:21 PM GMT
<input type="checkbox"/>	SH Sarah Howard	sarah.howarc	+1 (512)	United States	Today at 8:21 PM GMT
<input type="checkbox"/>	SH Sarah Howard	sarah.howrd	+1 (512)	United States	Today at 7:56 PM GMT

# Step 3 - Clean visible contact table fields

After the first clean-up pass, the contacts table looked more consistent and easier to review for duplicate-style records, blank statuses, and ownership gaps.

Step 3 Contacts View - Core Data Clean up

Contact owner - Create date - Last activity date - Lead status - Country/Region - + More | Advanced filters

	Name	Email	Phone Number	Favorite Content Topics	Preferred channels	Create Date (GMT)
<input type="checkbox"/>	NW Noah Walker	noah.walker	+1 (512) 5	--	--	Today at 8:21 PM GMT
<input type="checkbox"/>	AW Alyssa Walker	alyssa.walke	+1 (512)	--	--	Today at 8:21 PM GMT
<input type="checkbox"/>	JT Jacob Turner	jacob.turner	+1 (512)	--	--	Today at 8:21 PM GMT
<input type="checkbox"/>	ET Ella Turner	ella.turner	+1 (512)	--	--	Today at 7:56 PM GMT
<input type="checkbox"/>	RS Ryan Stewart	ryan.stewart	+1 (512)	--	--	Today at 8:21 PM GMT
<input type="checkbox"/>	GS Grace Stewart	grace.stewart	+1 (512)	--	--	Today at 7:56 PM GMT
<input type="checkbox"/>	NS Nora Simmons	nora.simmons	+1 (512)	--	--	Today at 8:21 PM GMT
<input type="checkbox"/>	MR Maria Rivera	maria.rivera	+1 (512)	--	--	Today at 7:56 PM GMT
<input type="checkbox"/>	DR Daniel Rivera	daniel.rivera	+1 (512)	United States	--	Today at 7:56 PM GMT
<input type="checkbox"/>	MR Mason Reed	mason.reed	+1 (512)	United States	--	Today at 7:56 PM GMT
<input type="checkbox"/>	AR Abigail Reed	abigail.ree	+1 (512)	United States	--	Today at 7:56 PM GMT
<input type="checkbox"/>	SR Sofia Ramirez	sofia.ramirez	+1 (512)	United States	--	Today at 8:21 PM GMT
<input type="checkbox"/>	MR Miguel Ramirez	miguel.ramirez	+1 (512)	United States	--	Today at 8:21 PM GMT
<input type="checkbox"/>	MP Mia Price	mia.pric	+1 (512)	United States	--	Today at 7:56 PM GMT
<input type="checkbox"/>	LP Lucas Price	lucas.price	+1 (512)	United States	--	Today at 8:21 PM GMT
<input type="checkbox"/>	PP Priya Patel	priya.pat	+1 (512)	United States	--	Today at 8:21 PM GMT
<input type="checkbox"/>	OP Omar Patel	omar.pate	+1 (512)	United States	--	Today at 7:56 PM GMT
<input type="checkbox"/>	LN Long Nguyen	long.nguyen	+1 (512)	United States	--	Today at 7:56 PM GMT
<input type="checkbox"/>	HN Hannah Nguyen	h.nguyen	+1 (512)	United States	--	Today at 7:56 PM GMT
<input type="checkbox"/>	NM Natalie Morris	natalie.morris	+1 (512)	United States	--	Today at 8:21 PM GMT

This step shows the first stage of the CRM fix process inside HubSpot. I standardised visible contact data by cleaning country values and aligning phone number formatting across the table. The goal at this stage was not to solve every issue at once, but to remove obvious field inconsistency first so the CRM was easier to review and prepare for duplicate merging and status correction.

# Step 4 - Standardise core company fields

Visible company records were cleaned by aligning country values, phone formatting, and other core fields so the account table was easier to trust operationally.

Step 4 Companies view - key fields standardised during cleanup

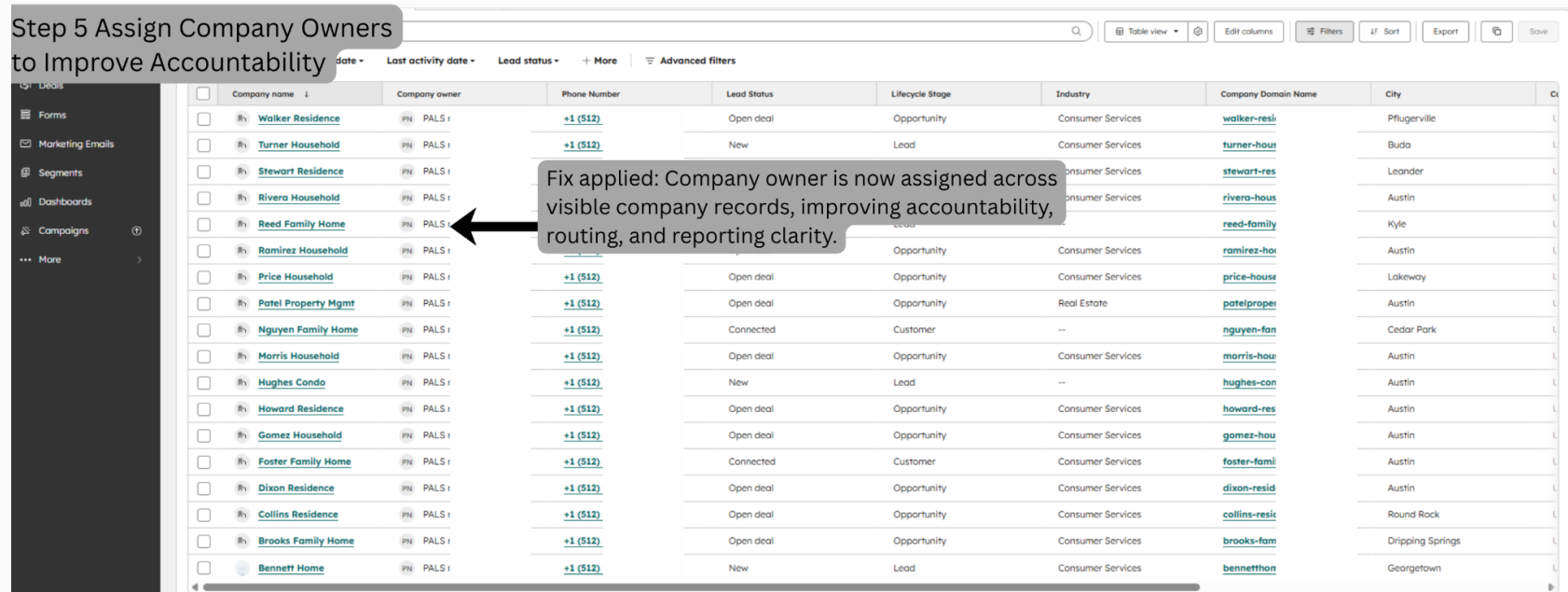
The companies table was cleaned to make the CRM more consistent and easier to trust. Country values, phone formatting, and core fields were being standardised as part of the fix phase.

Company name	Phone Number	Lead Status	Lifecycle Stage	Country/Region
Walker Residence	+1 (512) 55	Open deal	Opportunity	United States
Turner Household	+1 (512)	New	Lead	United States
Stewart Residence	+1 (512)	Open deal	Opportunity	United States
Rivera Household	+1 (512)	Open deal	Opportunity	United States
Reed Family Home	+1 (512)	New	Lead	United States
Ramirez Household	+1 (512)	Open deal	Opportunity	United States
Price Household	+1 (512)	Open deal	Opportunity	United States
Patel Property Mgmt	+1 (512) 55	Open deal	Opportunity	United States
Nguyen Family Home	+1 (512) 55	Connected	Customer	United States
Morris Household	+1 (512)	Open deal	Opportunity	United States
Hughes Condo	+1 (512) 55	New	Lead	United States
Howard Residence	+1 (512) 5	Open deal	Opportunity	United States
Gomez Household	+1 (512) 1	Open deal	Opportunity	United States
Foster Family Home	+1 (512) 1	Connected	Customer	United States
Dixon Residence	+1 (512) 1	Open deal	Opportunity	United States
Collins Residence	+1 (512) 5	Open deal	Opportunity	United States
Brooks Family Home	+1 (512) 5	Open deal	Opportunity	United States
Bennett Home	+1 (512) 1	New	Lead	United States

# Step 5 - Assign company owners

Ownership was added across visible company records so the account view no longer showed blank responsibility and routing could tie to named ownership inside the CRM.

## Step 5 Assign Company Owners to Improve Accountability



Company name	Company owner	Phone Number	Lead Status	Lifecycle Stage	Industry	Company Domain Name	City
Walker Residence	PN PALS 1	+1 (512)	Open deal	Opportunity	Consumer Services	walker-resi	Pflugerville
Turner Household	PN PALS 1	+1 (512)	New	Lead	Consumer Services	turner-hou	Buda
Stewart Residence	PN PALS 1	+1 (512)	Open deal	Opportunity	Consumer Services	stewart-res	Leander
Rivera Household	PN PALS 1	+1 (512)	Open deal	Opportunity	Consumer Services	rivera-hou	Austin
Reed Family Home	PN PALS 1	+1 (512)	Open deal	Opportunity	Consumer Services	reed-family	Kyle
Ramirez Household	PN PALS 1	+1 (512)	Open deal	Opportunity	Consumer Services	ramirez-hou	Austin
Price Household	PN PALS 1	+1 (512)	Open deal	Opportunity	Consumer Services	price-house	Lakeway
Patel Property Mgmt	PN PALS 1	+1 (512)	Open deal	Opportunity	Real Estate	patelproper	Austin
Nguyen Family Home	PN PALS 1	+1 (512)	Connected	Customer	--	nguyen-fan	Cedar Park
Morris Household	PN PALS 1	+1 (512)	Open deal	Opportunity	Consumer Services	morris-hou	Austin
Hughes Condo	PN PALS 1	+1 (512)	New	Lead	--	hughes-con	Austin
Howard Residence	PN PALS 1	+1 (512)	Open deal	Opportunity	Consumer Services	howard-res	Austin
Gomez Household	PN PALS 1	+1 (512)	Open deal	Opportunity	Consumer Services	gomez-hou	Austin
Foster Family Home	PN PALS 1	+1 (512)	Connected	Customer	Consumer Services	foster-fami	Austin
Dixon Residence	PN PALS 1	+1 (512)	Open deal	Opportunity	Consumer Services	dixon-resid	Austin
Collins Residence	PN PALS 1	+1 (512)	Open deal	Opportunity	Consumer Services	collins-resi	Round Rock
Brooks Family Home	PN PALS 1	+1 (512)	Open deal	Opportunity	Consumer Services	brooks-fam	Dripping Springs
Bennett Home	PN PALS 1	+1 (512)	New	Lead	Consumer Services	bennethon	Georgetown

# Step 6 - Assign deal owners

Deal ownership was filled across the visible pipeline so sales responsibility, reporting, and follow-up accountability were no longer blank.

## Step 6 Assign Deal Owners to Improve Sales Accountability

Deal Stage	Close Date (GMT)	Deal owner	Amount	
<input type="checkbox"/> Gomez Diagnostic Visit	Closed Lost (Sales Pipeline)	Mar 20, 2026 4:00 AM GMT	PIN PALS n/a (ab)	\$199
<input type="checkbox"/> Foster Summer Tune-Up	Closed Won (Sales Pipeline)	Mar 5, 2026 5:00 AM GMT	PIN PALS n/a (ab)	\$249
<input type="checkbox"/> Nguyen Spring Maintenance Plan	Closed Won (Sales Pipeline)	Mar 17, 2026 4:00 AM GMT	PIN PALS n/a (ab)	\$5,400
<input type="checkbox"/> Stewart Furnace Quote	Contract Sent (Sales Pipeline)	Apr 8, 2026 5:00 AM GMT+1	PIN PALS n/a (ab)	\$7,300
<input type="checkbox"/> Brooks Heat Pump Quote	Decision Maker Bought-In (S...	Apr 7, 2026 5:00 AM GMT+1	PIN PALS n/a (ab)	\$8,800
<input type="checkbox"/> Howard AC Replacement	Presentation Scheduled (Sal...	Apr 12, 2026 5:00 AM GMT+1	PIN PALS n/a (ab)	\$1,800
<input type="checkbox"/> Patel Multi-Unit Inspection	Presentation Scheduled (Sal...	Apr 5, 2026 5:00 AM GMT+1	PIN PALS n/a (ab)	\$2,100
<input type="checkbox"/> Morris Ductwork Quote	Qualified To Buy (Sales Pipel...	Apr 10, 2026 5:00 AM GMT+1	PIN PALS n/a (ab)	\$1,600
<input type="checkbox"/> Price Indoor Air Quality Quote	Qualified To Buy (Sales Pipel...	Apr 11, 2026 5:00 AM GMT+1	PIN PALS n/a (ab)	\$9,200
<input type="checkbox"/> Collins Full System Replacement	Qualified To Buy (Sales Pipel...	Apr 14, 2026 5:00 AM GMT+1	PIN PALS n/a (ab)	\$325
<input type="checkbox"/> Walker Service Visit	Appointment Scheduled (Sal...	Apr 1, 2026 5:00 AM GMT+1	PIN PALS n/a (ab)	\$299
<input type="checkbox"/> Dixon Maintenance Membership	Appointment Scheduled (Sal...	Apr 2, 2026 5:00 AM GMT+1	PIN PALS n/a (ab)	\$475
<input type="checkbox"/> Ramirez Emergency Repair	Appointment Scheduled (Sal...	Tomorrow at 5:00 AM GMT+1	PIN PALS n/a (ab)	\$350
<input type="checkbox"/> Rivera AC Repair - March 2026	Appointment Scheduled (Sal...	Mar 31, 2026 5:00 AM GMT+1	PIN PALS n/a (ab)	

The deals pipeline was already broadly structured, but ownership was missing across the visible records. In this step, deal owners were assigned so responsibility for each sales opportunity was clear, follow-up accountability improved, and the pipeline became more reliable for sales tracking and reporting.

# Validation - Review cleaned company record and associations

A cleaned company record was reviewed to confirm that ownership, lifecycle information, and core associations were in place.

The screenshot displays a CRM interface for a company record titled "Review Cleaned Company Record and Associations". The record is for "ramirez-household" with phone number "+1 (512) 555-0106".

**Key information:**

- Company owner: PALS n/a
- City: Austin
- Lifecycle Stage: Opportunity
- Lead Status: Open deal
- Industry: Consumer Services
- Last Contacted: --

**Overview:**

- Generated Mar 28, 2026
- No recent activities or communications are recorded. Add activities or associations to see an updated summary.
- Recent interactions: No activity on this record.
- Health: Sentiment (Generated March 28, 2026 12:35 AM)

**Contacts (5):**

- Miguel Ramirez**: Homeowner at Ramirez Household, Email: miguel.ramirez@, Phone Number: +1 (512), Contact with Primary Company
- Sofia Ramirez**: Homeowner at Ramirez Household, Email: sofia.ramirez@, Phone Number: +1 (512), Contact with Primary Company
- Connor Lane**: Homeowner at Ramirez Household, View all associated Contacts

**Deals (1):**

- Ramirez Emergency Repair**: Amount: \$475.00, Close Date: March 29, 2026, Deal Stage: Appointment Scheduled - Deal with Primary Company, View all associated Deals

**Tickets (0):**

# Validation - Review deal ownership and associations

A cleaned deal record was reviewed to confirm that ownership, stage, and related associations were correctly connected to the right contact and company.

The screenshot displays a CRM interface for a deal titled "Morris Household - New Deal". The interface is divided into several sections:

- Deal Overview:** Shows the deal name, amount, close date (03/31/2026), pipeline (Sales Pipeline), and deal stage (Appointment Scheduled). It includes action buttons for Note, Email, Call, Task, Meeting, and More.
- Activities:** A central section showing a list of activities. The first activity is "Deal Activity" with the description "PALS n/a moved Morris Household - New Deal to Appointment Scheduled" on March 28, 2026 at 12:30 AM GMT. The second activity is "Created" with the description "This deal was created" on the same date and time.
- Contacts (1):** Lists one contact, "Owen Kim", who is the homeowner of Morris Household. Contact information includes email (owen.ki@morris.com) and phone number (5-3908).
- Companies (1):** Lists one company, "Morris Household", with company domain name (morris.com) and phone number (+1 (512) 555-3908).
- Attachments:** A section for attachments, currently empty.

A text box overlay on the right side of the screenshot states: "A cleaned deal record was reviewed to confirm that ownership, stage, and core associations were in place. The deal is now linked to the correct contact and company, making the record more reliable for follow-up and pipeline management."

# Validation - Review cleaned contact record and associations

A cleaned contact record was reviewed to confirm that key details, lead status, company linkage, and active deal associations were in place.

**Review Cleaned Contact Record and Associations**

**Grace Stewart**  
Homeowner of Stewart Residence  
[grace.stew](#)

**Key information**

- Email: [grace.stew](#)
- Phone Number: +1 (512) 551-5551
- Preferred channels: --
- Favorite Content Topics: --
- Lead Status: Open deal
- Create Date: 05/27/2026 7:56 PM GMT

**Activities**

Activity (24/34) - All time - Activity assigned to - Clear all

March 2026

- Deal Activity**  
PALS n/a created deal [Stewart Residence - New Deal](#)
- Deal Activity**  
PALS n/a moved [Stewart Residence - New Deal](#) to [Appointment Scheduled](#)
- Contact Activity**  
PALS n/a moved Grace Stewart to Opportunity [View details](#)
- Created**  
This contact was created via Import

**Companies (1)**

- [Stewart Residence](#) (Primary)  
Company Domain Name: [st](#)  
Phone Number: [+1 \(512\) 551-5551](#)  
[Add association label](#)

**Deals (1)**

- [Stewart Residence - New Deal](#)  
Amount: --  
Close Date: March 31, 2026  
Deal Stage: **Appointment Scheduled** -  
[Add association label](#)

**Tickets (0)**

A cleaned contact record was reviewed to confirm that core details, lead status, and related associations were in place. The contact is now linked to the correct company and active deal, giving the CRM a clearer view of the customer journey and making follow-up more dependable.

# Delivered outcome

## What improved in this phase

- Country labels no longer vary across visible contact and company records.
- Phone number formatting is visibly more consistent in the contact table.
- Company-level accountability is no longer blank across the visible rows.
- Deal-level ownership is now visible across the pipeline examples.
- Company, deal, and contact associations were validated at record level.

## Scope completed

- Contact country values standardised
- Contact phone formatting aligned
- Visible contact table fields cleaned
- Core company fields standardised
- Company owners assigned
- Deal owners assigned
- Company, deal, and contact associations validated

## Phase completed

This report documents the CRM review, cleanup, ownership repair, and record-level validation completed in this phase.