

Auditing 171+ HubSpot Workflows and Make.com Automations

Full RevOps Audit for an Ecommerce Business | HubSpot | Make.com | Workflow Mapping | Operational Risk Review

HubSpot workflows reviewed	Automation layer reviewed	Scope	Status
171+	Make.com	Active + Inactive	Ongoing review

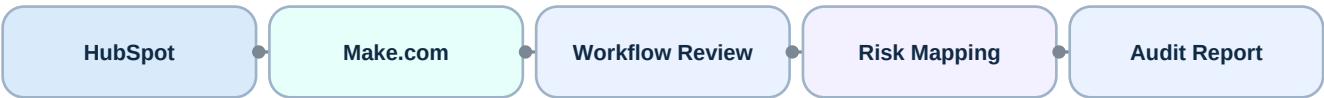
Executive Summary

Conducted a full RevOps audit for an ecommerce business, reviewing approximately 171 HubSpot workflows across both active and inactive states, along with the client's Make.com automations. The audit was designed to map the current automation landscape, identify operational risks, document system behavior, and prepare the remaining architecture for further review.

Business Challenge

The business had an increasingly complex automation environment spread across HubSpot and Make.com. Without a structured audit, this kind of environment becomes difficult to understand, maintain, and scale. The objective was to create clarity around what existed, how it behaved, and where architecture required attention.

Automation Landscape Audit Flow



My Responsibilities

- Audited the full HubSpot workflow environment
- Reviewed both active and inactive workflows
- Mapped workflow behavior and structural dependencies
- Audited Make.com automations in both active and inactive states
- Organized findings into audit reports
- Identified remaining architecture that still needed review
- Supported ongoing audit work as the system review expanded

Scope of Work

The review covered both the CRM automation layer and the surrounding Make.com environment. The goal was to produce a clear inventory of what existed, how it was behaving, and where the system still needed deeper analysis.

HubSpot Audit Reviewed around 171 total workflows , including both turned-on and turned-off workflows.	Make.com Audit Reviewed the client's Make.com automation layer, including both active and inactive scenarios.
Ongoing Review Additional architecture assessment was still in progress for the remaining parts of the system.	Audit Focus Workflow inventory, state mapping, system complexity, dependencies, maintainability, and documentation gaps.

Review Lens

State Mapping Separated active and inactive assets so the client could see what was live versus what was simply sitting in the system.	Dependency Review Mapped how automations related to one another to expose hidden complexity and shared dependencies.	Documentation Turned audit findings into usable notes and reports for internal decision-making.
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What the Audit Focused On

- Workflow inventory and state mapping
- System complexity and overlap
- Automation structure and maintainability
- Hidden operational dependencies
- Areas where future scaling could create risk
- Gaps in architecture documentation

Findings and Deliverables

Workflow Inventory

Created a structured view of the automation landscape, separating active and inactive assets so the client could understand what existed in the system.

Documentation Output

Compiled findings into audit reports that could support internal review, prioritization, and future cleanup or redesign.

Dependency Review

Mapped how workflows and automations related to one another, helping expose where operational complexity might accumulate.

Architecture Roadmap

Prepared the remaining architecture for continued assessment as the audit expanded beyond the initial scope.

Business Value

- Created visibility into a complex automation environment
- Helped document the operational state of the client's systems
- Supported better decision-making around future automation changes
- Reduced the risk of unmanaged workflow sprawl
- Established a clearer foundation for architecture improvements

Key Lessons

This project reinforced that growing automation systems need structured review just as much as they need new implementation. As workflow volume increases, the real challenge becomes governance, clarity, and maintainability. A proper RevOps audit is not just about finding what exists. It is about understanding how the business actually runs through its systems.

1. Visibility Matters Without a system-level view, automation environments can become difficult to manage even when each individual workflow seems reasonable.	2. State Matters Active and inactive assets both matter during an audit because they reveal history, design decisions, and hidden operational clutter.
3. Documentation Is Strategy Audit documentation is not just reporting. It becomes a decision-making tool for cleanup, redesign, and scaling.	4. Maintainability Wins The best automation systems are not only functional. They are understandable, governable, and ready for change.

Technology Stack

HubSpot HubSpot Workflows CRM automation and lifecycle operations	Make.com Automation review and scenario mapping
RevOps Documentation Audit reporting and architecture notes	Scope Active and inactive system review

Prepared as a premium LinkedIn Featured case study and portfolio asset.

Appendix: Final Deliverable Evidence

Screenshot of the workflow inventory sheet used as final evidence of the audit deliverable. This appendix can be used as proof of scope, structure, and documentation quality.

117

Integrations & Webhooks

Summarise this data

	A	B	C	D	E	F	G	H	I
1	Workflow Name	Workflow Link	Object	Trigger	Actions	Description	Webhook	Suggested Name	Suggested Fold
	League Pipeline & Decoration Type	9124/platform/flow/1849475629/edit	Deal	Type = Known	Usama.	spreadsheet is created and the decoration type is set.	No	Usama On Decoration Type)	Automation
6	Update Deal Stage to Create Work Order after Sales Handoff	https://app.hubspot.com/workflows/39819124/platform/flow/1848288116/edit	Deal	Stage = Sales Handoff	Delay 2 hours. Set Stage to "Create Work Order"	Automatically moves deals to the "Create Work Order" stage 2 hours after a sales handoff.	No	Stage is "Sales Handoff" (Update Deal Stage to Create Work Order)	Sales Pipeline Automation
7	Quote Approved	https://app.hubspot.com/workflows/39819124/platform/flow/1620293194/edit	Deal	Stage = Quote Approved	Set Stage to "Sales Handoff"	Automatically advances deals to the Sales Handoff stage as soon as a quote is approved.	No	Stage is "Quote Approved"	Sales Pipeline Automation
8	Pipeline is "Sales Pipeline", stage is "Order Placed"	https://app.hubspot.com/workflows/39819124/platform/flow/1846536071/edit	Deal	Pipeline = Sales Pipeline AND Stage = Order Placed	Send "Order Placed" email to Deal Owner.	Notifies the Deal Owner when an order is placed in the Sales Pipeline.	No	Pipeline is "Sales Pipeline", stage is "Order Placed"	Sales Pipeline Automation
9	Pipeline is "Cart Pipeline", deal stage is "Store Closed"	https://app.hubspot.com/workflows/39819124/platform/flow/614084420/edit	Deal	Pipeline = Cart Pipeline AND Stage = Store Closed	Send "Cart Closed" email to John & Usama.	Alerts John and Usama when a store cart is closed.	No	Pipeline is "Cart Pipeline", stage is "Store Closed"	Cart Pipeline Automation
10	Pipeline is "League Pipeline", stage is "Generate Invoice"	https://app.hubspot.com/workflows/39819124/platform/flow/1759773246/edit	Deal	Pipeline = League Pipeline AND Stage = Create QuickBooks Invoice	No Action	Nothing other than trigger	No	Pipeline is "League Pipeline", stage is "Create QuickBooks Invoice"	League Pipeline Automation
11	Pipeline is "League Pipeline", stage is "Generate Invoice"	https://app.hubspot.com/workflows/39819124/platform/flow/1846533931/edit	Deal	Pipeline = League Pipeline AND Stage = Generate Invoice	Send "Generate Invoice" email to Dawn.	Alerts Dawn to generate an invoice for League Pipeline deals.	No	Pipeline is "League Pipeline", stage is "Generate Invoice"	League Pipeline Automation
12	Pipeline is "Sales Pipeline", stage is "Work Order Complete"	https://app.hubspot.com/workflows/39819124/platform/flow/1765813432/edit	Deal	Pipeline = Sales Pipeline AND Stage = Work Order Complete	Send "Work Order Complete" approval email to Deal Owner.	Alerts the Deal Owner that a work order is complete and requires their approval.	No	Pipeline is "Sales Pipeline", stage is "Work Order Complete"	Sales Pipeline Automation
13	Deal stage move to Prepare Art work	https://app.hubspot.com/workflows/39819124/platform/flow/1846483225/edit	Deal	Pipeline = Sales Pipeline AND Stage = Order Placed	Set Stage to "Prepare Artwork".	Automatically advances deals to the "Prepare Artwork" stage once an order is placed.	No	Pipeline is "Sales Pipeline" (Deal stage move to Prepare Art work)	Sales Pipeline Automation
14	Notify Dawn to confirm the Final Quote at Deal stage Generate Invoice	https://app.hubspot.com/workflows/39819124/platform/flow/1811857580/edit	Deal	Generate Invoice (Sales or League Pipeline) AND "At what stage..." = Generate Invoice	Send "Verify Final Quote" and "Verify Contact/Company" emails to Dawn.	Instructs Dawn to verify the quote, contact, and company details when a deal reaches the Generate Invoice stage in either pipeline.	No	Stage is "Generate Invoice"	Sales Pipeline Automation
15	Pipeline is "League Pipeline", stage is "Ready to Ship or Pick up"	https://app.hubspot.com/workflows/39819124/platform/flow/1842764552/edit	Deal	Pipeline = League Pipeline AND Stage = Ready to Ship or Pick up	Delay 2 days. Set Stage to "Generate Invoice".	Automatically moves League deals to the Generate Invoice stage 2 days after they are ready for shipping or pickup.	No	Pipeline is "League Pipeline", stage is "Ready to Ship or Pick up"	League Pipeline Automation
16	Send Webhook >> Deal Stage is Order Placed	https://app.hubspot.com/workflows/39819124/platform/flow/1824974869/edit	Deal	Stage = Sales Handoff (Sales) OR Orders Being Placed (League) AND Owner is not Dan/Walter/Sam/Nolan AND "At what stage..." = Order Placed AND Create QB Invoice = True	Send POST webhook (Make.com).	Triggers a webhook to Make.com for QuickBooks invoice creation when specific deal criteria are met, excluding select owners.	Yes	Stage is "Sales Handoff"	Integrations & Webhooks
				Create QuickBooks Invoice (Sales or League) AND Owner is not					

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Workflows(Turned On)

Workflows(Turned Off)

Make.com(On)

Make.com(Off)

Webhook Connection