

Lab: From Data Chaos to Clarity With HubSpot Smart CRM

Brenna Zenaty and Aaron Schmaltz

Hello and Welcome!



Brenna
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HubSpot Academy



Aaron
Schmaltz

Senior Professor,
HubSpot Academy



HubSpot Academy

Our vision is to power a global learning community through **content, experiences, and credentials**, so that we drive adoption, maximize career potential, and scale HubSpot capabilities upmarket.

Before We Get Started

- This session is meant to be **interactive**! If you have your laptop or tablet we recommend following along in your **portal** or in our **workbook**
- We have **session leaders**, a HubSpot product manager, and plenty of **knowledgeable peers** in the room today. We're all here to help!
- We have a lot to cover, and we want to deep dive where possible. For any questions we can't cover live, add them to our **community AMA**



You can download our step-by-step tutorial guide and access the community AMA [here!](#)

Ice breaker:

First time at INBOUND?

Ice breaker:

East Coast vs. West Coast?

Ice breaker:

Parks and Rec vs. The Office?

Session Agenda

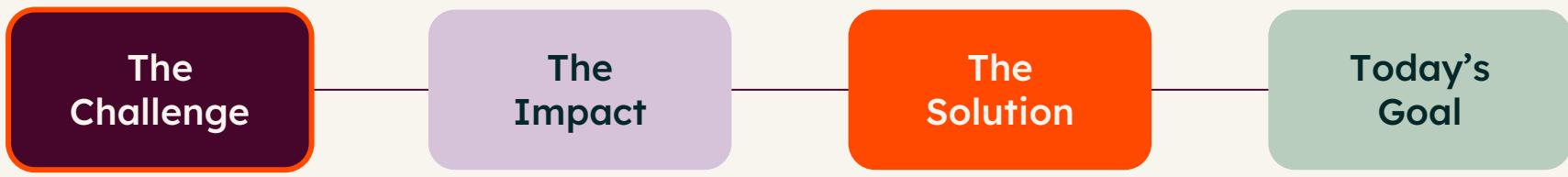
- Unifying Your Customer Data With HubSpot Smart CRM
- Creating a Framework for Your Data
- Keeping Your Customer Data Clean
- Making Your Data Accessible and Actionable
- Build Along: Record Customization
- Wrap-Up, Q&A and Resources

Unifying Your Customer Data With HubSpot Smart CRM



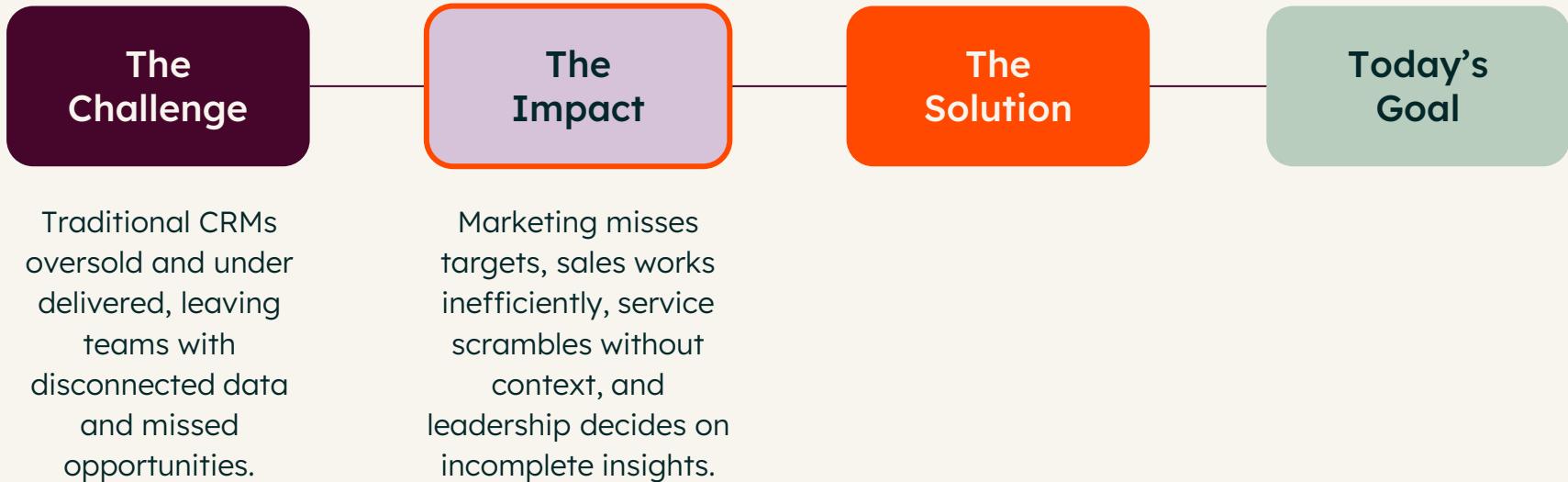
Why is unifying your data important?

The world has changed. Your CRM should too.

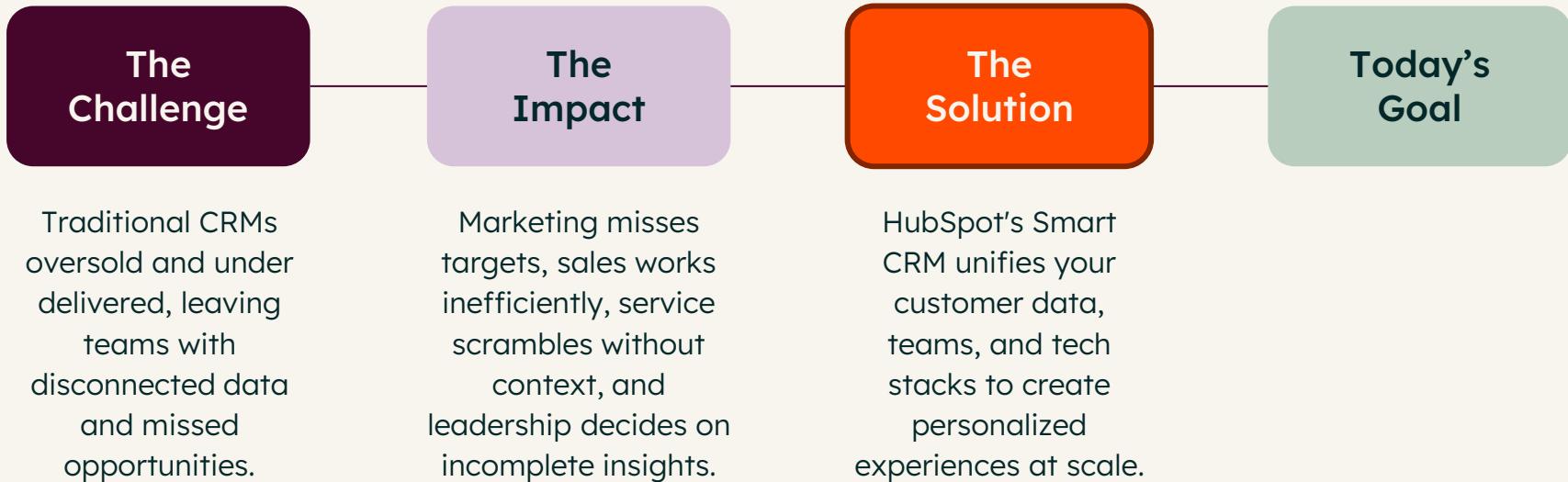


Traditional CRMs oversold and under delivered, leaving teams with disconnected data and missed opportunities.

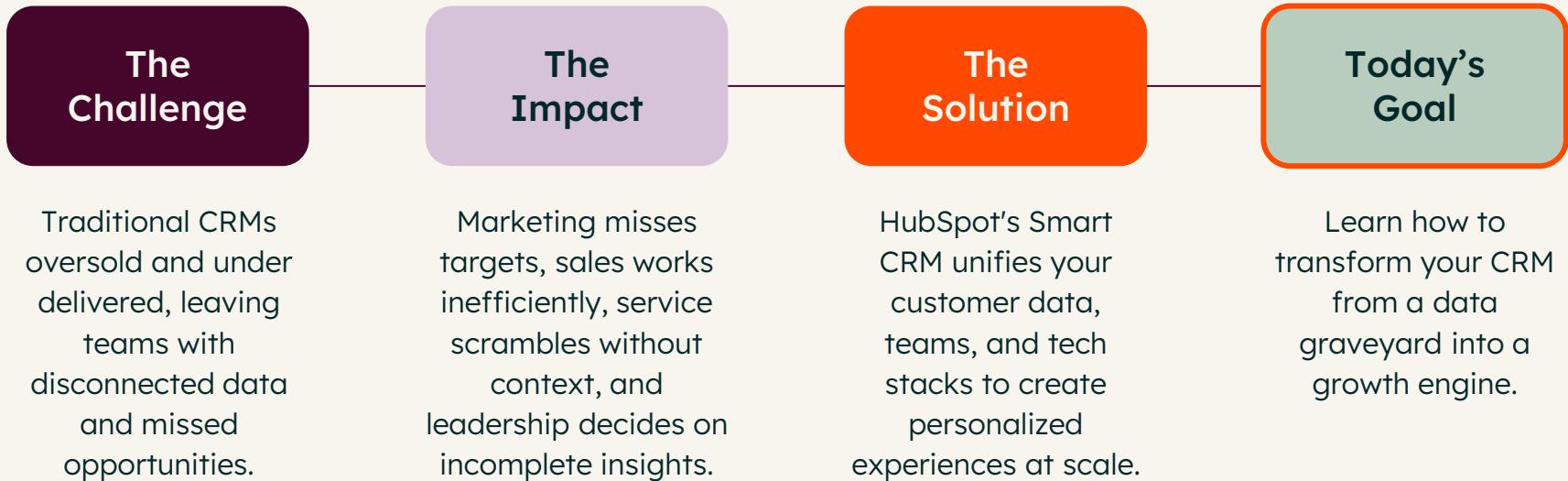
The world has changed. Your CRM should too.



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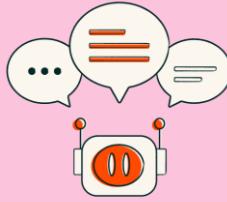
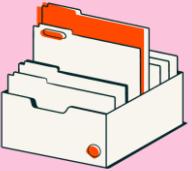
Creating a Framework for Your Customer Data



Data modeling is the process of structuring how your customer information connects and flows through your CRM to reflect real customer relationships rather than rigid organizational silos.



Why is data modeling important?



59%

of organizations
lack a unified data
strategy

95%

of IT leaders report
that integration
challenges hinder AI
adoption

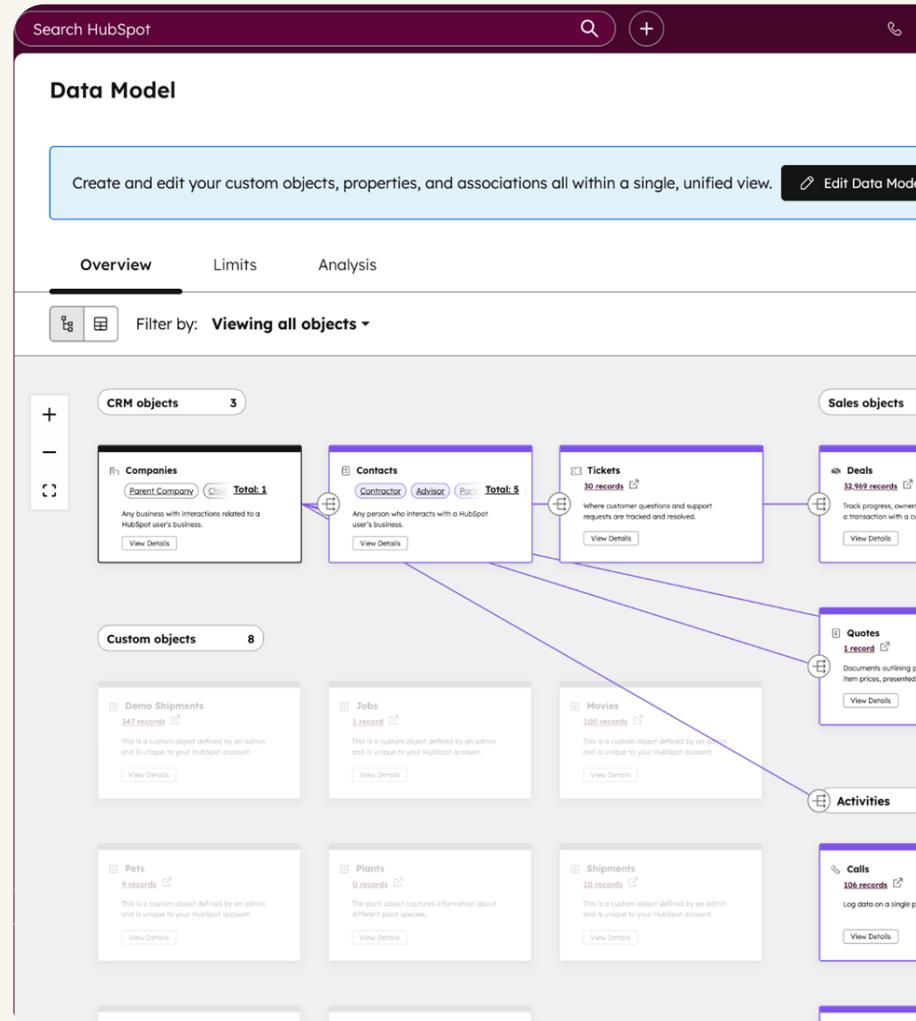
83%

of companies using
HubSpot say their
CRM effectively unifies
ALL their data

Data Model Tool

What it is: a visual command center that maps all your customer relationships, processes, and data connections in one place.

Why it matters: Before you can optimize your data, you need to see it clearly.





Let's explore!

Log in to your HubSpot account, or -

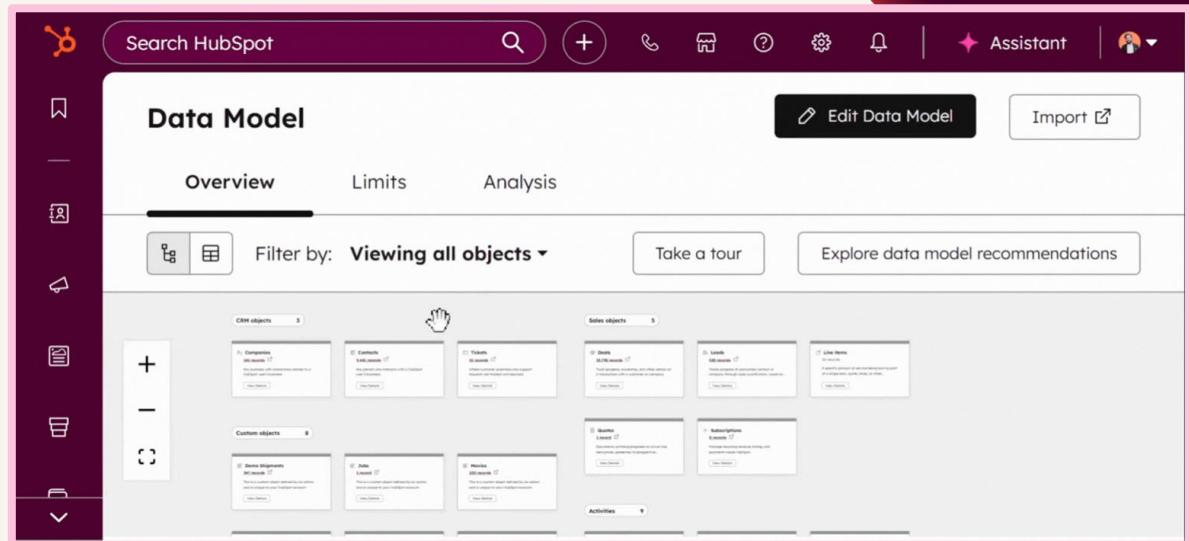
download the session
workbook here!



Overview Tab

Left Nav Bar > Data Model

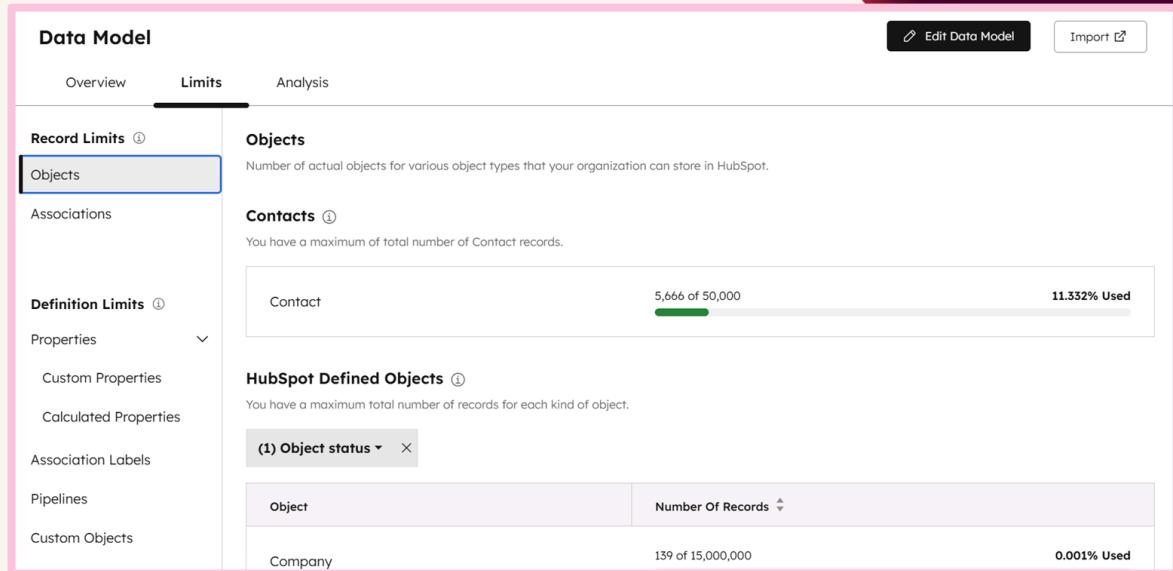
- Zoom in and out of objects
- Click an object to see its relationships
- Click “Details” to see usage, properties, and associations



Limits Tab

Left Nav Bar > Data Model

- View your object and property limit numbers
- View your association, custom object, and pipeline limit numbers
- Merge duplicates



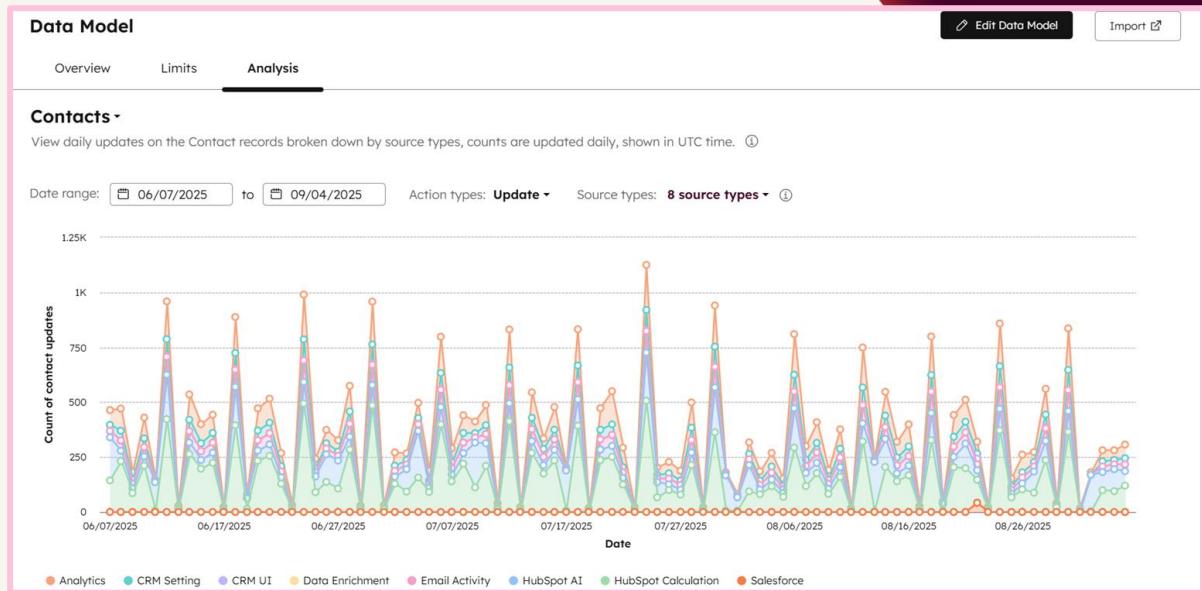
The screenshot shows the 'Data Model' interface with the 'Limits' tab selected. On the left, a sidebar lists 'Record Limits' (Objects, Associations) and 'Definition Limits' (Properties, Custom Properties, Calculated Properties, Association Labels, Pipelines, Custom Objects). The main area displays 'Objects' and 'Contacts' limits. For 'Objects', it shows a total of 5,666 of 50,000 records used (11.332% Used). For 'Contacts', it shows a maximum of total number of Contact records. Below this, a section for 'HubSpot Defined Objects' shows a table for 'Object status' with one entry for 'Company' (139 of 15,000,000 records, 0.001% Used).

Object	Number Of Records	Used (%)
Company	139 of 15,000,000	0.001% Used

Analysis Tab

Left Nav Bar > Data Model

- View your object changes over time
- Adjust timeline, source, and action type
- Chart and table views available

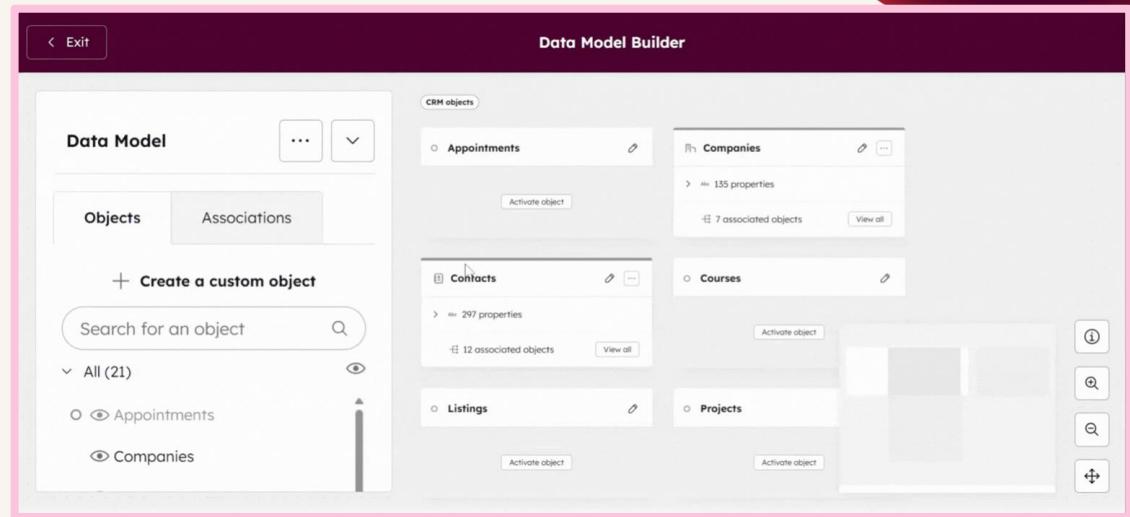


New!

Data Model Builder

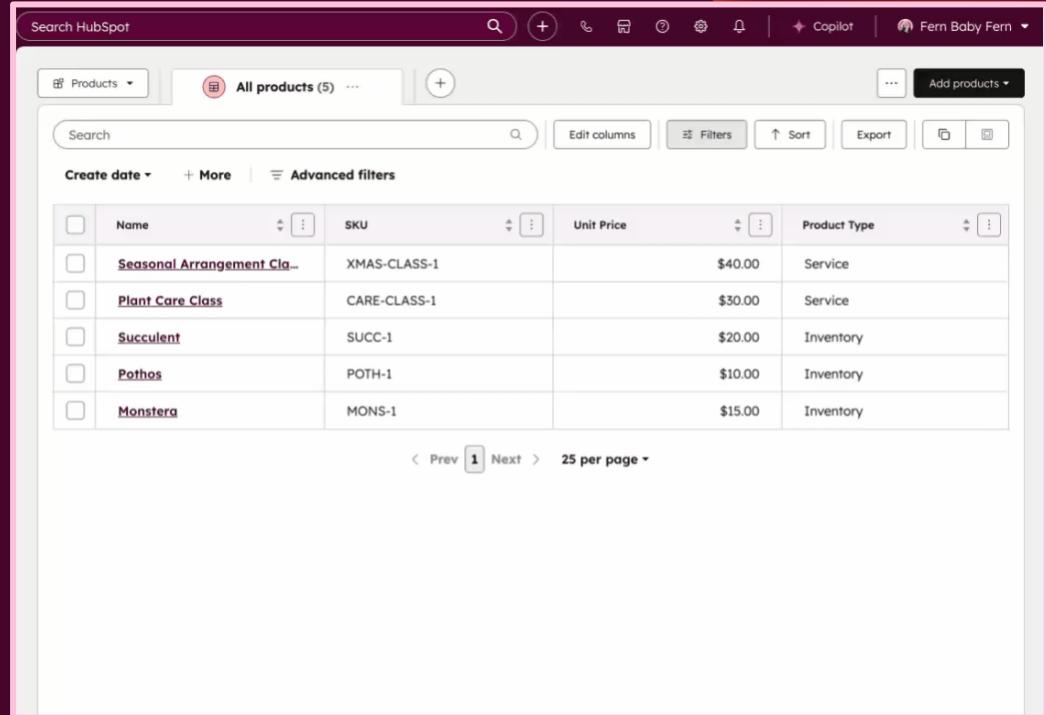
*Left Nav Bar > Data Model >
Edit Data Model*

- View all objects and properties in one place
- Rename objects (even standard CRM objects!)
- Visualize associations and association labels



Other Tools to Know: **Product library**

A centralized catalog of goods and services you sell; create once, then associate with deals, quotes, and invoices; tracks pricing, SKUs, and product details across your entire sales process.



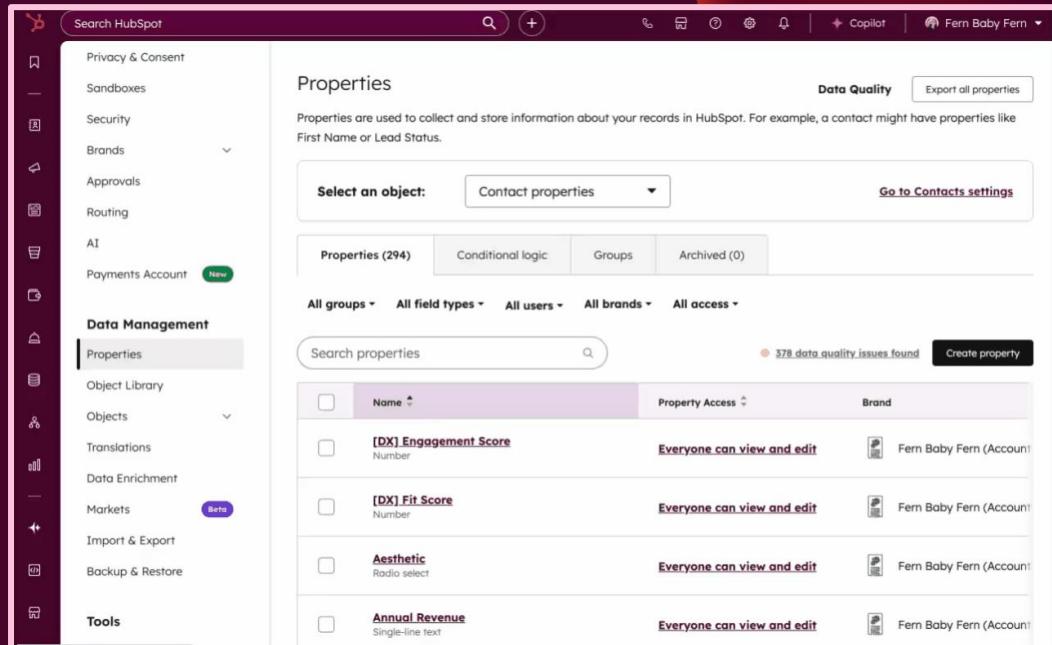
The screenshot shows a product library interface in HubSpot. The top navigation bar includes a search bar, a 'Products' dropdown, a 'Copilot' button, and a user profile for 'Fern Baby Fern'. The main interface displays a table of products with the following data:

	Name	SKU	Unit Price	Product Type
<input type="checkbox"/>	<u>Seasonal Arrangement Cla...</u>	XMAS-CLASS-1	\$40.00	Service
<input type="checkbox"/>	<u>Plant Care Class</u>	CARE-CLASS-1	\$30.00	Service
<input type="checkbox"/>	<u>Succulent</u>	SUCC-1	\$20.00	Inventory
<input type="checkbox"/>	<u>Pothos</u>	POTH-1	\$10.00	Inventory
<input type="checkbox"/>	<u>Monstera</u>	MONS-1	\$15.00	Inventory

At the bottom, there are navigation buttons for 'Prev' and 'Next', a page number '1', and a '25 per page' dropdown.

Other Tools to Know: **Custom properties**

Fields that store unique information specific to your business; create drop down lists, checkboxes, date pickers, and more to capture exactly what matters to your customers and processes.

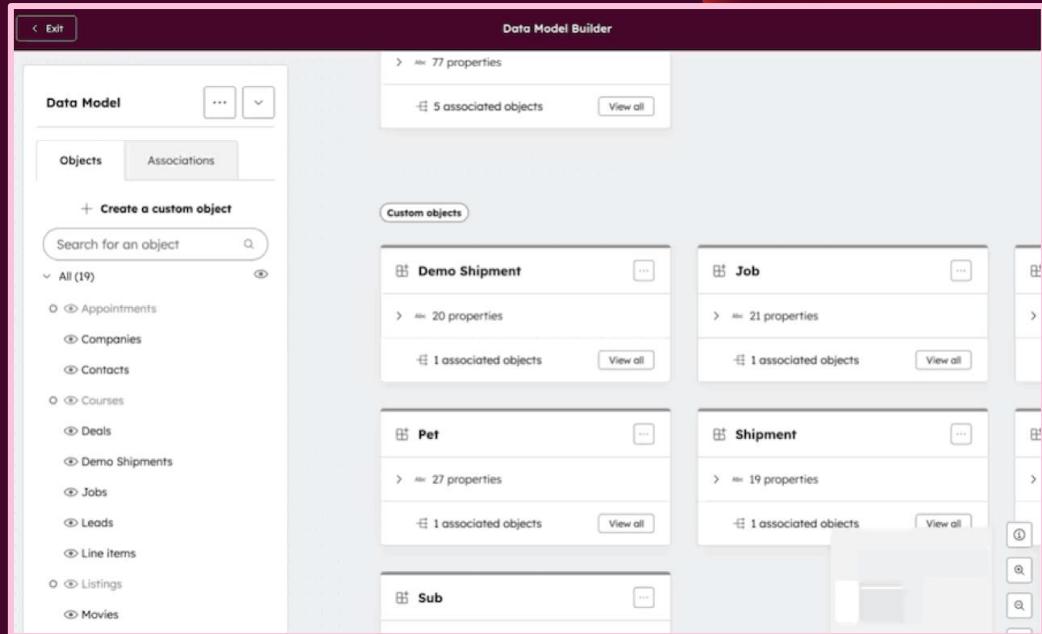


The screenshot shows the HubSpot Properties page. The left sidebar is titled 'Search HubSpot' and includes sections for Privacy & Consent, Data Management (Properties is selected), and Tools. The main 'Properties' section has a sub-header 'Properties (294)'. It features a search bar, filters for 'All groups', 'All field types', 'All users', 'All brands', and 'All access', and a 'Create property' button. Below the filters is a table with columns for Name, Property Access, and Brand. The table lists five properties: '[DX] Engagement Score' (Number, Everyone can view and edit, Fern Baby Fern (Account)), '[DX] Fit Score' (Number, Everyone can view and edit, Fern Baby Fern (Account)), 'Aesthetic' (Radio select, Everyone can view and edit, Fern Baby Fern (Account)), and 'Annual Revenue' (Single-line text, Everyone can view and edit, Fern Baby Fern (Account)).

Name	Property Access	Brand
[DX] Engagement Score	Everyone can view and edit	Fern Baby Fern (Account)
[DX] Fit Score	Everyone can view and edit	Fern Baby Fern (Account)
Aesthetic	Everyone can view and edit	Fern Baby Fern (Account)
Annual Revenue	Everyone can view and edit	Fern Baby Fern (Account)

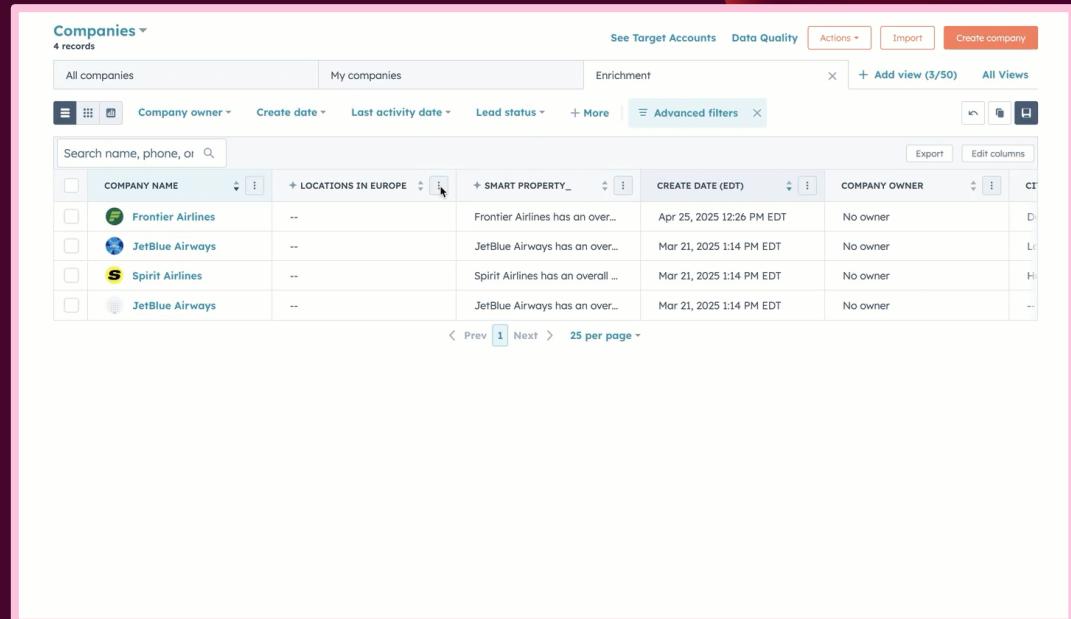
Other Tools to Know: **Custom objects**

(Ent Only) Unique business entities that can't be managed with standard objects; use when you need to track business processes or relationships that need their own records and associations.



Other Tools to Know: **Smart properties**

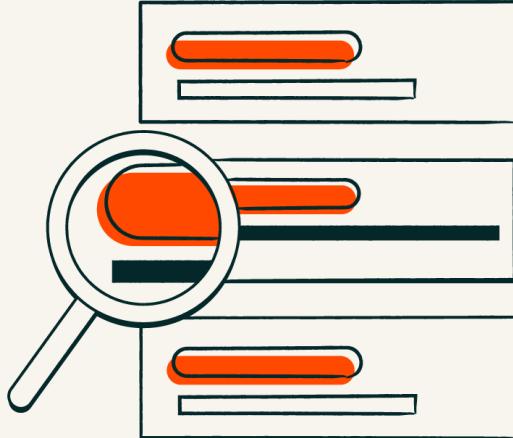
Use Breeze AI to automatically research and populate custom CRM fields with business-specific information.



The screenshot shows a CRM software interface titled 'Companies' with 4 records. The interface includes a search bar, filters (Company owner, Create date, Last activity date, Lead status, + More, Advanced filters), and buttons for See Target Accounts, Data Quality, Actions, Import, and Create company. The main table lists companies with columns: COMPANY NAME, LOCATIONS IN EUROPE, SMART PROPERTY, CREATE DATE (EDT), and COMPANY OWNER. The data shows entries for Frontier Airlines, JetBlue Airways, and Spirit Airlines, with Breeze AI enrichment notes like 'Frontier Airlines has an over...' and 'JetBlue Airways has an over...'. The table has a footer with navigation buttons (Prev, Next, 25 per page) and export/edit column options.

COMPANY NAME	LOCATIONS IN EUROPE	SMART PROPERTY	CREATE DATE (EDT)	COMPANY OWNER
Frontier Airlines	--	Frontier Airlines has an over...	Apr 25, 2025 12:26 PM EDT	No owner
JetBlue Airways	--	JetBlue Airways has an over...	Mar 21, 2025 1:14 PM EDT	No owner
Spirit Airlines	--	Spirit Airlines has an overall ...	Mar 21, 2025 1:14 PM EDT	No owner
JetBlue Airways	--	JetBlue Airways has an over...	Mar 21, 2025 1:14 PM EDT	No owner

Keeping Your Customer Data Clean



Data hygiene is the ongoing process of maintaining clean, accurate, and complete customer information by eliminating duplicates, updating outdated records, and filling missing data gaps.



Why is data hygiene important?

Poor data quality costs
organizations an average of

\$12.9M
annually

*(plus the trust their
teams lose in the
system)*

Data Validation

What it is: built-in property validation rules that enforce data standards at the point of entry across all CRM properties.

Why it matters: your team can trust data accuracy for segmentation, reporting, and automation.



Company Name
Contact

Back

Manage

- Details ✓
- Field type ✓
- Rules ✓
- Manage access ✓
- Preview

Monitor

- Usage (4)
- Data quality (0)
- Data sources

This property is provided by HubSpot, and only some rules can be modified.

Select property rules

Visibility

- Show property in forms
Use this property in forms, pop-up forms, and bots
- Show in global search results (0 of 3)
Allow users to search for information entered into this property

Validation

Specify what values are allowed for this property. These rules apply when editing, and importing records with the CRM. [Learn more](#)

- Validate using simple rules
- Validate using regular expression (regex) ⓘ

Simple validation rules

- Require unique values for this property (0 of 10)
- Set min character limit
- Set max character limit

Allowed characters

- Allow all characters
- Allow numbers only
This includes characters like . or -, used for formatting numbers. No other characters allowed.
- Don't allow special characters
Don't allow use of characters like @, &, # in this property.



Let's explore!

Log in to your HubSpot account, or -

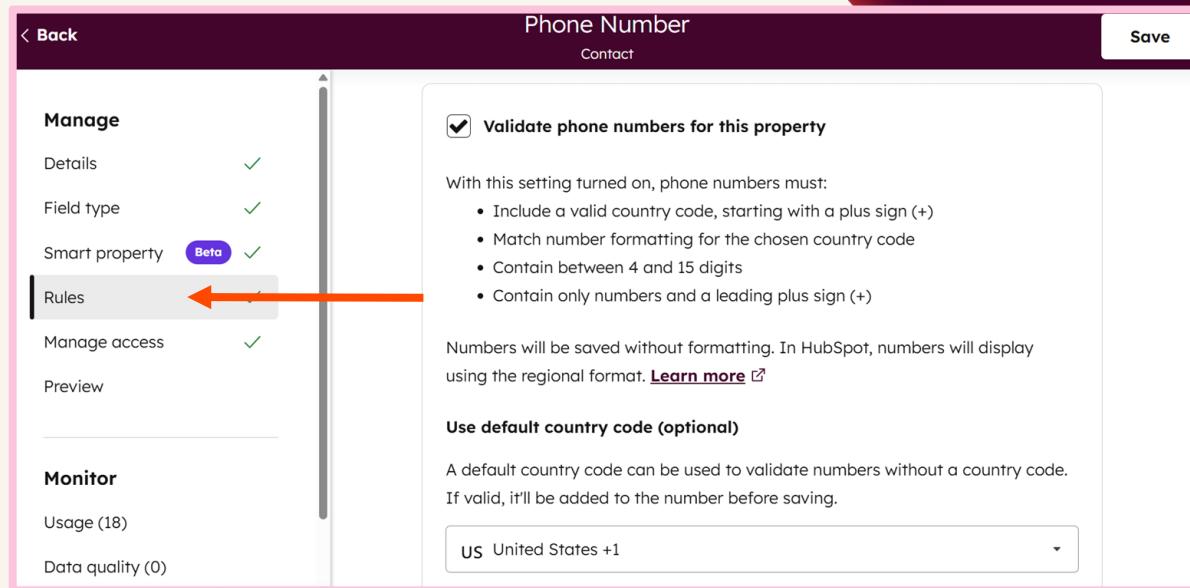
download the session
workbook here!



Data Validation

*Settings > Properties > Contact
Properties > Rules*

- Click **Rules** to apply data validation
- Click **Preview** to test your validation
- Different property types will have different data validation options

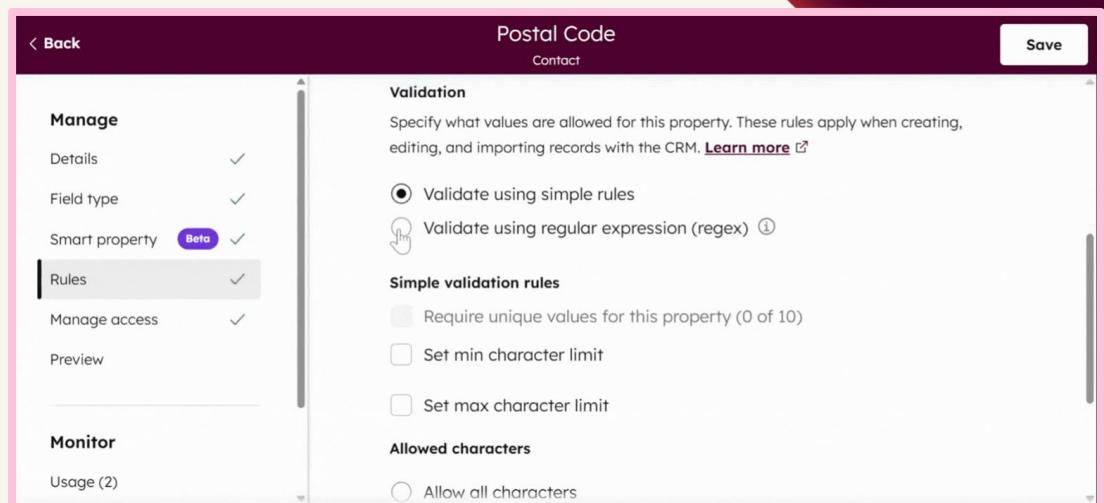


The screenshot shows the 'Phone Number' property settings in HubSpot. On the left, a sidebar lists 'Manage' and 'Monitor' sections with various configuration options. The 'Rules' option is highlighted with a red arrow pointing to it. The main content area is titled 'Phone Number' and 'Contact'. It contains a checked checkbox for 'Validate phone numbers for this property'. Below this, there are validation rules: 'With this setting turned on, phone numbers must:' followed by four bullet points: 'Include a valid country code, starting with a plus sign (+)', 'Match number formatting for the chosen country code', 'Contain between 4 and 15 digits', and 'Contain only numbers and a leading plus sign (+)'. A note below states: 'Numbers will be saved without formatting. In HubSpot, numbers will display using the regional format. [Learn more](#)'.

Regex/AI Validation

*Settings > Properties > Contact
Properties > Rules*

- Use Regex to validate complex data formats
- Use Breeze prompts to automatically generate Regex
- Preview and test your code

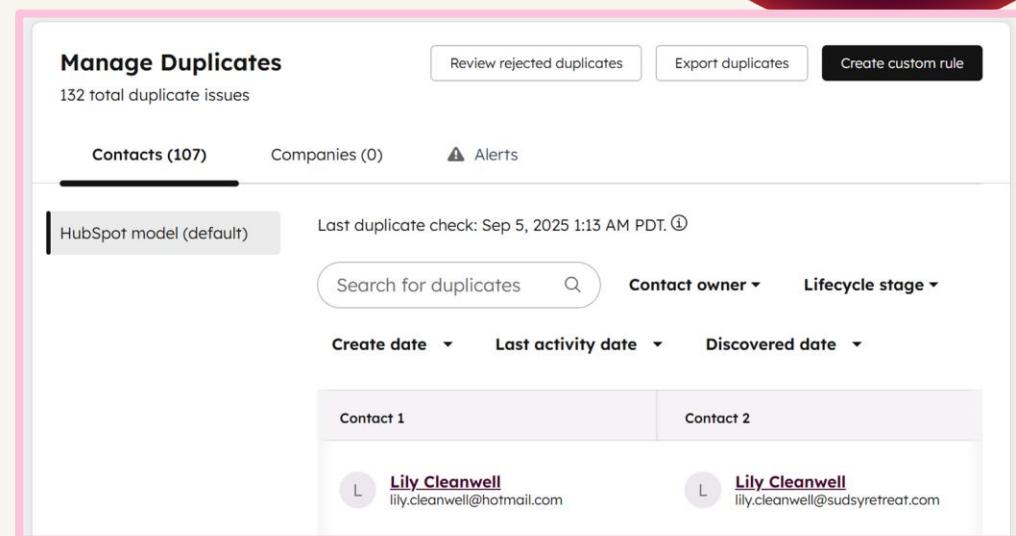


The screenshot shows the 'Postal Code' property settings in the Breeze CRM. The 'Validation' section is open, showing the 'Simple validation rules' and 'Allowed characters' sections. The 'Simple validation rules' section contains three checkboxes: 'Require unique values for this property (0 of 10)', 'Set min character limit', and 'Set max character limit'. The 'Allowed characters' section contains one radio button: 'Allow all characters'. The 'Manage' sidebar on the left shows the 'Rules' option is selected. The 'Monitor' sidebar shows 'Usage (2)'.

Duplicate Management

Left Nav Bar > Data Quality > Manage Duplicates

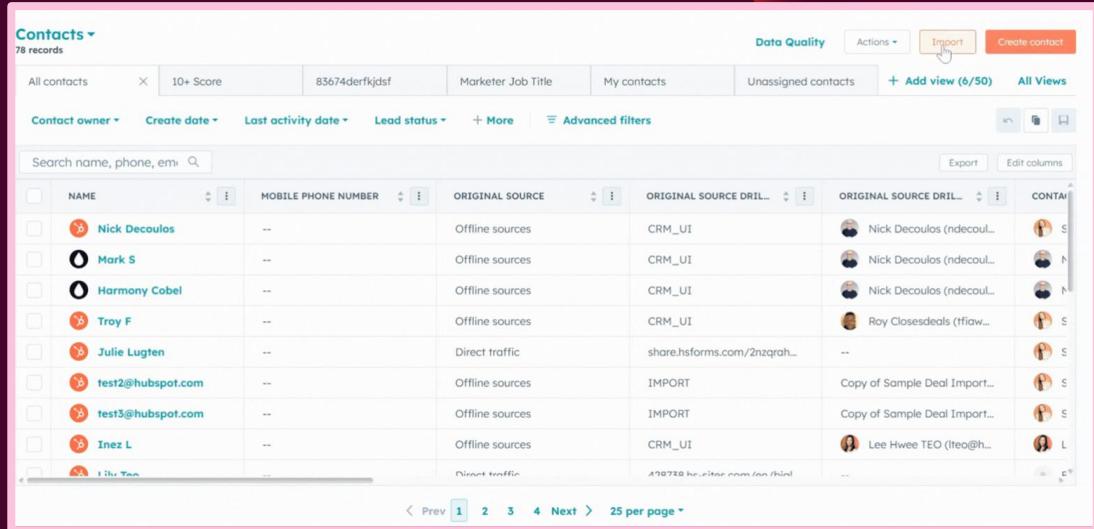
- Automatically find duplicates based on common properties
- Create a habit of reviewing and merging/rejecting
- Create custom rules



The screenshot shows the 'Manage Duplicates' interface in HubSpot. At the top, there are buttons for 'Review rejected duplicates', 'Export duplicates', and 'Create custom rule'. Below this, a header says 'Manage Duplicates' and '132 total duplicate issues'. There are tabs for 'Contacts (107)', 'Companies (0)', and 'Alerts', with 'Contacts' being the active tab. A note says 'Last duplicate check: Sep 5, 2025 1:13 AM PDT. [①](#)'. Below this are filters for 'Search for duplicates', 'Contact owner', 'Lifecycle stage', and date ranges ('Create date', 'Last activity date', 'Discovered date'). The main table has two columns: 'Contact 1' and 'Contact 2'. Two rows of contacts are shown, both named 'Lily Cleanwell'. The first contact has the email 'lily.cleanwell@hotmail.com' and the second has 'lily.cleanwell@sudsyretreat.com'.

Other Tools to Know: Data Import Tool

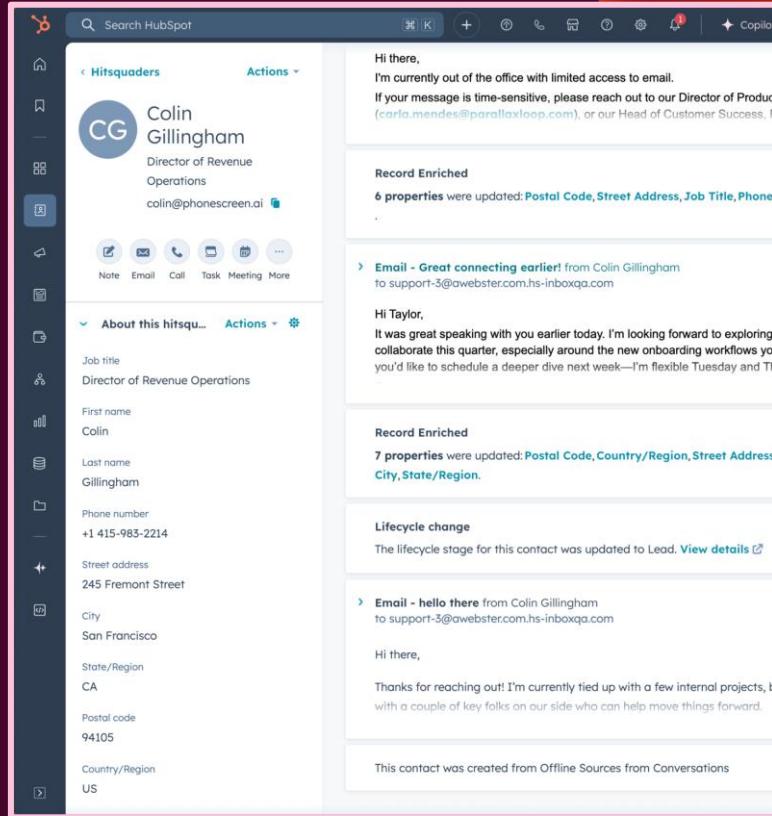
Bulk create and update CRM records by uploading spreadsheet files with built-in column mapping, error detection, and validation rule enforcement to ensure clean data enters your database.



NAME	MOBILE PHONE NUMBER	ORIGINAL SOURCE	ORIGINAL SOURCE DRILLDOWN	ORIGINAL SOURCE DRILLDOWN	CONTACTS
Nick Decoulos	--	Offline sources	CRM_UI	 Nick Decoulos (ndecoul... 	 Nick Decoulos (ndecoul... 
Mark S	--	Offline sources	CRM_UI	 Nick Decoulos (ndecoul... 	 Nick Decoulos (ndecoul... 
Harmony Cobel	--	Offline sources	CRM_UI	 Nick Decoulos (ndecoul... 	 Nick Decoulos (ndecoul... 
Troy F	--	Offline sources	CRM_UI	 Roy Closesdeals (tfiaw... 	 Roy Closesdeals (tfiaw... 
Julie Lugten	--	Direct traffic	share.hsforms.com/2nzqrh...	 Copy of Sample Deal Import... 	 Copy of Sample Deal Import... 
test2@hubspot.com	--	Offline sources	IMPORT	 Copy of Sample Deal Import... 	 Copy of Sample Deal Import... 
test3@hubspot.com	--	Offline sources	IMPORT	 Copy of Sample Deal Import... 	 Copy of Sample Deal Import... 
Inez L	--	Offline sources	CRM_UI	 Lee Hwee TEO (lito@h... 	 Lee Hwee TEO (lito@h... 
Thi Tu	--	Direct traffic	API720 bp_v1/lead-create.html	 	 

Other Tools to Know: Data enrichment

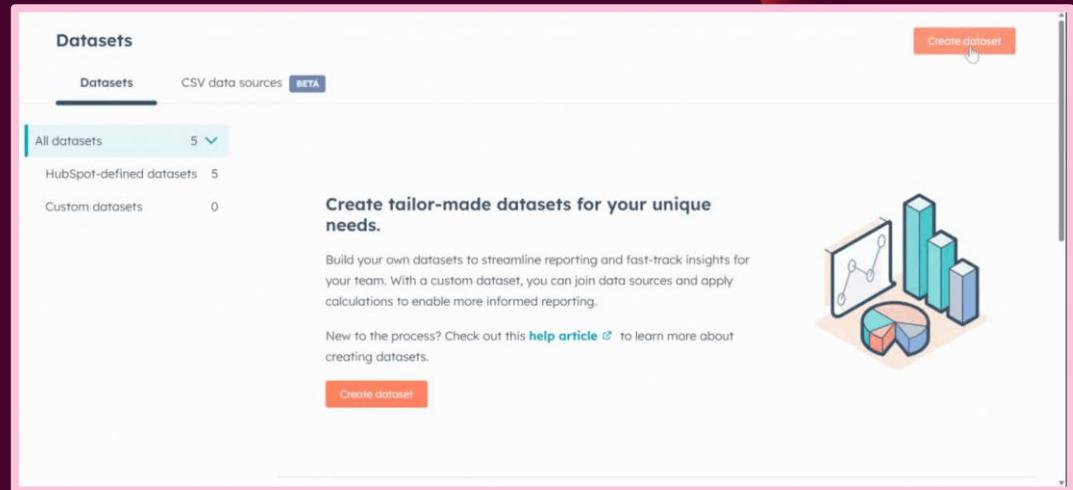
Maintain accurate and complete information in HubSpot Smart CRM by enriching contact and company records with additional data.



The screenshot shows the HubSpot CRM interface. On the left, a sidebar contains icons for Home, Bookmarks, Lists, and a search bar labeled 'Search HubSpot'. The main area displays a contact record for 'Colin Gillingham' (Director of Revenue Operations) with an email from 'Colin Gillingham' to 'support-3@awebster.com.hs-inboxqa.com' with the subject 'Email - Great connecting earlier!'. Below the contact record, a sidebar shows 'About this hitsqu...' with details: Job title (Director of Revenue Operations), First name (Colin), Last name (Gillingham), Phone number (+1 415-983-2214), Street address (245 Fremont Street), City (San Francisco), State/Region (CA), Postal code (94105), and Country/Region (US). To the right, a list of enrichment logs is shown, including an email from 'Colin Gillingham' to 'support-3@awebster.com.hs-inboxqa.com' with the subject 'Email - hello there', a message from 'Hi there,' with the text 'I'm currently out of the office with limited access to email. If your message is time-sensitive, please reach out to our Director of Product (carla.mendes@parallelloop.com), or our Head of Customer Success, R...', and a message from 'Hi Taylor,' with the text 'It was great speaking with you earlier today. I'm looking forward to exploring collaborate this quarter, especially around the new onboarding workflows you'd like to schedule a deeper dive next week—I'm flexible Tuesday and Th...'. The bottom of the interface shows a note: 'This contact was created from Offline Sources from Conversations'.

Other Tools to Know: **Pre-built datasets**

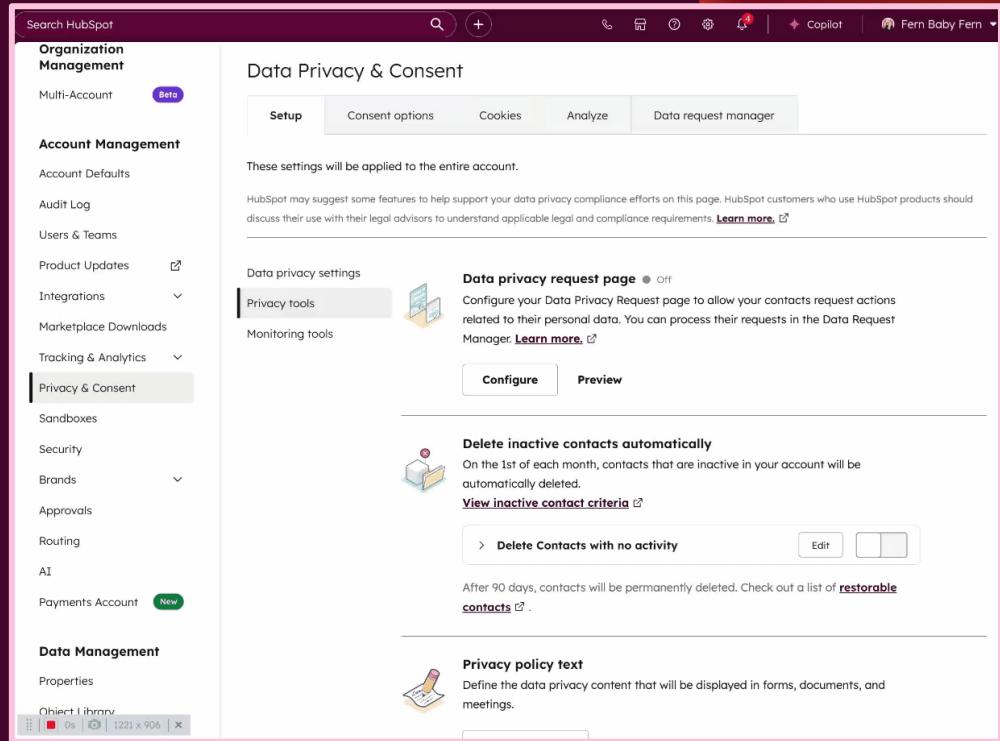
(Pro+) Access ready-to-use collections of CRM data that can be immediately utilized in custom reports without manual configuration of data sources and relationships.



The screenshot shows the 'Datasets' page in HubSpot. At the top, there are tabs for 'Datasets' (selected) and 'CSV data sources' (BETA). Below the tabs, a section titled 'All datasets' shows 5 HubSpot-defined datasets and 0 custom datasets. To the right of this section, a call-to-action text reads: 'Create tailor-made datasets for your unique needs.' Below this text, a description explains: 'Build your own datasets to streamline reporting and fast-track insights for your team. With a custom dataset, you can join data sources and apply calculations to enable more informed reporting.' At the bottom of the page, there is a 'Create dataset' button. To the right of the text, there is a graphic featuring a line graph, a pie chart, and several bar charts.

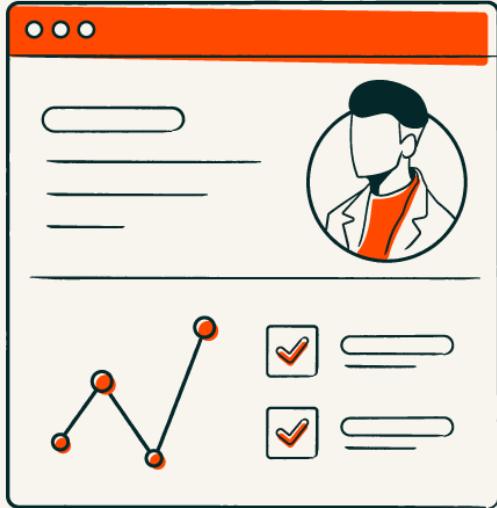
Other Tools to Know: Sensitive data

(Ent Only) Create custom properties with enhanced encryption and restricted access to securely store personal, financial, or medical information in compliance with regulations.



The screenshot shows the HubSpot Data Privacy & Consent settings page. The left sidebar has a 'Privacy & Consent' section highlighted. The main page title is 'Data Privacy & Consent' with tabs for 'Setup', 'Consent options', 'Cookies', 'Analyze', and 'Data request manager'. A note says these settings apply to the entire account. It suggests features for data privacy compliance. Under 'Data privacy settings', 'Privacy tools' is selected. It shows a 'Data privacy request page' status as 'off' with a 'Configure' button. A section for 'Delete inactive contacts automatically' is shown with a 'Configure' button and a note about contacts being deleted after 90 days. A 'Privacy policy text' section allows defining data privacy content for forms, documents, and meetings.

Making Your Customer Data Accessible and Actionable



Data accessibility is the practice of organizing and presenting customer information so teams can quickly find, understand, and act on the data most relevant to their specific roles.



Why is data accessibility important?

Perfect data becomes an
**expensive
paperweight**

when teams can't easily find,
understand, or act on customer insights.

Let's build: Record Customization Revival (20 min)

Our goal: help TechGrow Solutions (fictional B2B software company) enhance their team's CRM experience by reviving their record layouts and making their data more accessible and actionable.

How to participate:

1. Follow along in your own HubSpot account: create a test record layout that you can delete later
2. Use the lab workbook: download our step-by-step guide where you can plan your own customizations
3. Watch and learn: follow the demo and take notes for later implementation.

Your takeaway: a proven framework for CRM customization that you can immediately apply to improve your team's efficiency.

Download the session
workbook here!



Search HubSpot

Cora's Contacts

My contacts (3)

All contacts

Add contacts

Bookmarks

CRM

Marketing

Content

Sales

Commerce

Service

Data Management

Reporting

Breeze

Partner

Contacts

Search

Table view

Edit columns

Filter (1)

Sort

Metrics

Export

Contact owner

Create date

Last activity date

Lead status

More

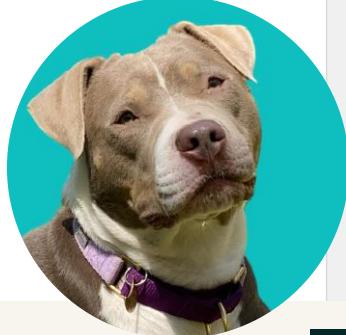
Clear all

Advanced filters

	Name	Company Name	Email	Contact Owner
<input type="checkbox"/>	 Priya Khan	TechCorp Industries	priya.khan@techcorp-indu...	 Cora Zenaty (corazena...)
<input type="checkbox"/>	 Marcus Ostberg	StartupVentures	marcus.ostberg@startupve...	 Cora Zenaty (corazena...)
<input type="checkbox"/>	 Zara Williams	GlobalTech Corp	zara.williams@globaltech.c...	 Cora Zenaty (corazena...)

< Prev 1 Next > 25 per page

⭐ Sales Rep Cora



Search HubSpot  

     Assistant Fern Baby Fern 

Contacts Actions ▾

 **Priya Khan**
Vice President of Operations at
TechCorp Industries
priya.khan@techcorp-
industries.com

Note Email Call Task Meeti... More

Contact Context Actions ▾

Email priya.khan@techcorp-industries.com
Job title Vice President of Operations
Phone number (555) 234-7891
Contact owner Cora Zenaty
Last contacted 08/27/2025 11:27 AM PDT
City Austin

Overview Activities Intelligence

Data highlights

CREATE DATE	LAST ACTIVITY DATE
08/28/2025 2:30 PM PDT	09/03/2025 5:00 AM PDT
RECENT SALES EMAIL CLICKED DATE	LEGAL BASIS FOR PROCESSING CONTACT'S DATA
--	Legitimate interest - Lead

Demo Feedback

DEMO FEEDBACK	DEMO STATUS
Very impressed with the automatio...	Completed

Tickets 

Search 	Ticket owner 	Create date 	More 
Ticket Name	Ticket Owner		
<u>Issues with Trial Account</u>	 Brenna Zen		

Breeze record summary 

Companies (1) 

 TechCorp Industries <u>techcorp-industrie...</u>  
Phone: --

[View associated Company](#)

Leads (1) 

 Priya Khan Owner: Cora Zenaty  Lead type: New Business Stage: Qualified  (Lead pipel... Qualified on 8/29/2025 and <u>TechCorp Industries - Enterprise Automation Platform Implementation</u> created
  

Search HubSpot  

     Assistant  Fern Baby Fern 

  Contacts Actions ▾

 **Marcus Ostberg**
Director of Sales at
StartupVentures
marcus.ostberg@startupve
ntures.io 

 Note  Email  Call  Task  Meeti...  More

Contact Information Actions ▾

Email
marcus.ostberg@startupventures.io
Phone number
(555) 987-6543
Contact owner
Cora Zenaty
Last contacted
07/15/2025 6:45 AM PDT
Lifecycle stage
New Bloom 

Overview Activities Intelligence  Breeze record summary 

Data highlights

CREATE DATE	LAST ACTIVITY DATE
08/28/2025 2:30 PM PDT	09/03/2025 5:00 AM PDT
RECENT SALES EMAIL CLICKED DATE	LEGAL BASIS FOR PROCESSING CONTACT'S DATA
--	Legitimate interest - Lead

Demo Feedback

DEMO FEEDBACK	DEMO STATUS
--	Not Scheduled

Tickets 

No associated objects of this type exist or you don't have permission to view them.

Deal stage tracker

No associated objects of this type exist.

Companies (1) 

 StartupVentures startupventures.io  
Phone: --

[View associated Company](#)

Leads (1) 

 Marcus Ostberg Owner: Cora Zenaty  Lead type: New Business Stage: New ▾ (Lead pipeline) Created on 08/29/2025 10:56 AM PDT
--

Record customization

*Settings > Data Management > Objects >
Select Object > Record Customization tab*

- Create tailored record layout views
- Assign custom views to specific teams

The screenshot shows the HubSpot Data Management Objects page. The left sidebar lists various objects: Properties, Object Library, Objects (with 'Contacts' selected), Companies, Leads, Deals, Tickets, Products, Payment Links, Quotes, Subscriptions, Projects (Beta), Services, Courses, Listings, Appointments, Invoices, and Forecast. The main content area is titled 'Contacts' and shows a table of custom views. The table has columns for 'View Name', 'Assigned To', and 'Last Updated'. It lists two views: 'Default view' (assigned to 'All unassigned teams and users') and 'TechGrow Solutions - Default View' (assigned to 'Support East', 'Support Global', 'Marketing Global', and '+ 6 more'). A red box highlights the description for the 'TechGrow Solutions - Default View', which reads: 'Support West, Sales Global, Sales West, Sales East, Marketing West, and Marketing East'. The top navigation bar includes a search bar, a plus sign for creating new objects, and various account management icons.

Edit layout

Settings



Assign teams

Overview

Activities

Intelligence

Change tab order

Data highlights ⓘ

Data highlights - Contact (default)

**Demo Feedback** ⓘ

New data highlight card - (08/28/2025 8:52 PM)

**Tickets** ⓘ

Tickets Association table (default)

**Deal stage tracker** ⓘ

New association stage tracker card - (08/29/2025 5:26 PM)

**Activities card** ⓘ

New activities card - (08/29/2025 5:52 PM)

**Companies** ⓘ

Companies Association table (default)

**Deals** ⓘ

Deals Association table (default)

**Breeze record summary** ⓘ

Breeze Copilot record summary (default)

**Companies** ⓘ

Companies Association card (default)

**Lead stage tracker** ⓘ

Lead stage tracker (default)

**Deals** ⓘ

Deals Association card (default)

**Quotes** ⓘ

Quotes (default)

**Tickets** ⓘ

Tickets Association card (default)

**Payment Links** ⓘ

Payment Links Association card (default)

**Contacts** ⓘ

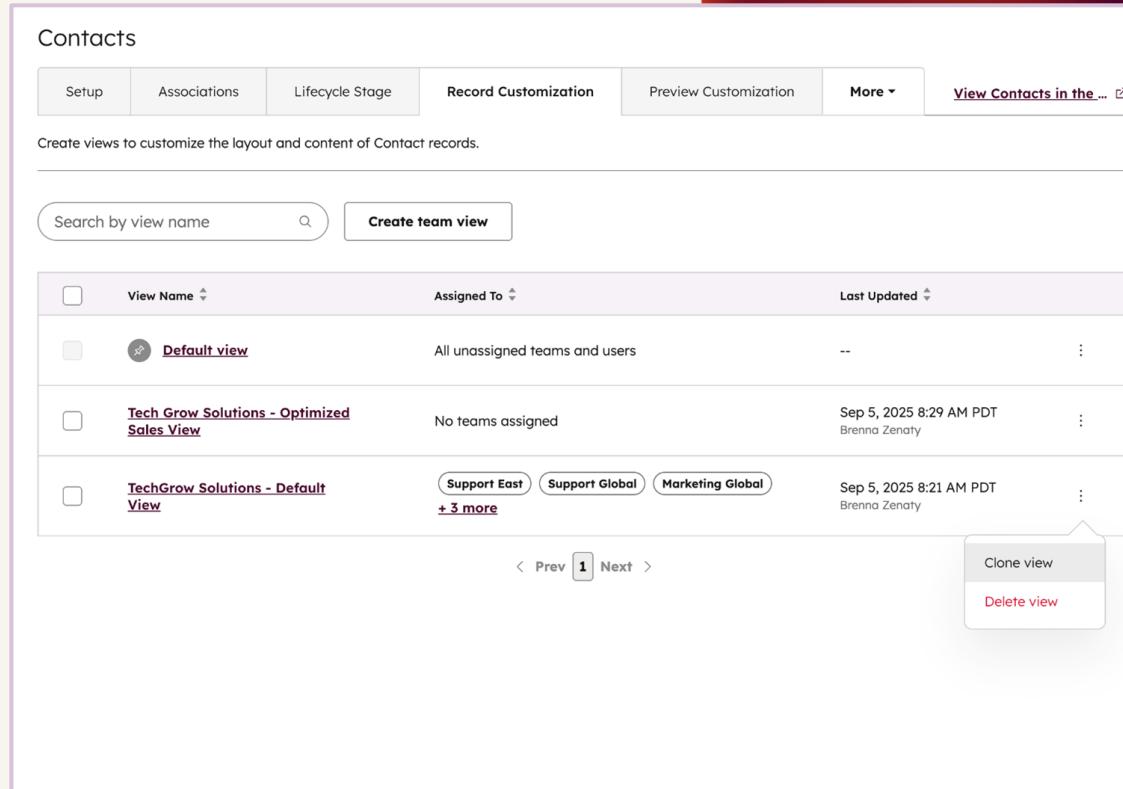
Contacts Association card (default)



Create team view

Settings > Data Management > Objects > Select Object > Record Customization tab

- Create a new team view
- Clone an existing view



The screenshot shows the 'Contacts' Record Customization page. At the top, there are tabs: Setup, Associations, Lifecycle Stage, Record Customization (which is selected), Preview Customization, More, and a link to 'View Contacts in the ...'. Below the tabs, a message says 'Create views to customize the layout and content of Contact records.' A search bar 'Search by view name' and a 'Create team view' button are present. The main area displays a list of views:

<input type="checkbox"/>	View Name	Assigned To	Last Updated
<input type="checkbox"/>	Default view	All unassigned teams and users	--
<input type="checkbox"/>	Tech Grow Solutions - Optimized Sales View	No teams assigned	Sep 5, 2025 8:29 AM PDT Brenna Zenaty
<input type="checkbox"/>	TechGrow Solutions - Default View	Support East Support Global Marketing Global + 3 more	Sep 5, 2025 8:21 AM PDT Brenna Zenaty

At the bottom, there are navigation buttons: < Prev 1 Next >. On the right, there is a 'Clone view' button and a 'Delete view' button.

[Exit](#)[Save](#)[Save and exit](#)[Edit layout](#)[Settings](#)[Assign teams](#)[Overview](#)[Activities](#)[Intelligence](#)[Change tab order](#)**Data highlights**

Data highlights - Contact (default)

**Demo Feedback**

New data highlight card - (08/28/2025 8:52 PM)

**Tickets**

Tickets Association table (default)

**Deal stage tracker**

New association stage tracker card - (08/29/2025 5:26 PM)

**Activities card**

New activities card - (08/29/2025 5:52 PM)

**Companies**

Companies Association table (default)

**Deals**

Deals Association table (default)

**Breeze record summary**

Breeze Copilot record summary (default)

**Companies**

Companies Association card (default)

**Lead stage tracker**

Lead stage tracker (default)

**Deals**

Deals Association card (default)

**Quotes**

Quotes (default)

**Tickets**

Tickets Association card (default)

**Payment Links**

Payment Links Association card (default)

**Contacts**

Contacts Association card (default)



[Exit](#)[Save](#)[Save and exit](#)[Edit layout](#)[Settings](#)[Assign teams](#)[Overview](#)[Activities](#)[Intelligence](#)[Change tab order](#)[Data highlights](#)

Data highlights - Contact (default)

[Demo Feedback](#)

New data highlight card - (08/28/2025 8:52 PM)

[Deal stage tracker](#)

New association stage tracker card - (08/29/2025 5:26 PM)

[Activities card](#)

New activities card - (08/29/2025 5:52 PM)

[Companies](#)

Companies Association table (default)

[Deals](#)

Deals Association table (default)

[Breeze record summary](#)

Breeze Copilot record summary (default)

[Companies](#)

Companies Association card (default)

[Lead stage tracker](#)

Lead stage tracker (default)

[Deals](#)

Deals Association card (default)

[Quotes](#)

Quotes (default)

[Tickets](#)

Tickets Association card (default)

[Payment Links](#)

Payment Links Association card (default)

[Contacts](#)

Contacts Association card (default)





Search HubSpot



Fern Baby Fern ▾



Contacts

Actions ▾



Priya Khan

Vice President of Operations at
TechCorp Industries
priya.khan@techcorp-
industries.com



Note



Email



Call



Task



Meeti...



More

Overview

Activities

Intelligence

Data highlights

CREATE DATE

08/28/2025 2:30 PM PDT

LAST ACTIVITY DATE

09/03/2025 5:00 AM PDT

RECENT SALES EMAIL CLICKED DATE

--

LEGAL BASIS FOR PROCESSING CONTACT'S DATA

Legitimate interest - Lead

Contact Context

Actions ▾

Email

priya.khan@techcorp-industries.com

Job title

Vice President of Operations

Phone number

(555) 234-7891

Contact owner

Cora Zenaty

Last contacted

08/27/2025 11:27 AM PDT

City

Austin

Demo Feedback

DEMO FEEDBACK

Very impressed with the automatio...

DEMO STATUS

Completed

Tickets

+Add

Search



Ticket owner ▾

Create date ▾

More ▾

Ticket Name

Ticket Owner

Issues with Trial Account

Brenna Zen

Tickets (1)

+Add

Issues with Trial Account

Open 11 days

Owner: Brenna Zenaty

Status: Waiting on contact ▾

[View associated Ticket](#)

Payment Links (0)

Add ▾

Give customers a fast, flexible way to pay. Add a payment link to accept a payment and associate it with this record.

Contacts (0)

+Add



See the people associated with this record.

[Exit](#)[Save](#)[Save and exit](#)[Edit layout](#)[Settings](#)[Assign teams](#)[Overview](#)[Activities](#)[Intelligence](#)[Change tab order](#)[Data highlights](#)

Data highlights - Contact (default)

[Demo Feedback](#)

New data highlight card - (08/28/2025 8:52 PM)

[Deal stage tracker](#)

New association stage tracker card - (08/29/2025 5:26 PM)

[Activities card](#)

New activities card - (08/29/2025 5:52 PM)

[Companies](#)

Companies Association table (default)

[Deals](#)

Deals Association table (default)

[Breeze record summary](#)

Breeze Copilot record summary (default)

[Companies](#)

Companies Association card (default)

[Lead stage tracker](#)

Lead stage tracker (default)

[Deals](#)

Deals Association card (default)

[Quotes](#)

Quotes (default)

[Tickets](#)

Tickets Association card (default)

[Payment Links](#)

Payment Links Association card (default)

[Contacts](#)

Contacts Association card (default)



[Exit](#)[Save](#)[Save and exit](#)[Edit layout](#)[Settings](#)[Assign teams](#)

Sales Essentials ⓘ

New property list card - (09/05/2025 3:5...

[Edit](#) [...](#)

Contact Context ⓘ

About this contact (default)

[Edit](#) [...](#)

Account Details ⓘ

New property list card - (09/05/2025 3:5...

[Edit](#) [...](#)

[Overview](#) ⓘ

[Activities](#)

[Intelligence](#)

[+](#) [Change tab order](#)

Recent Engagement ⓘ

New data highlight card - (09/05/2025 4:30 PM)

[Edit](#) [...](#)

Demo Feedback ⓘ

New data highlight card - (08/28/2025 8:52 PM)

[Edit](#) [...](#)

Allbound Timeline ⓘ

Allbound Timeline - Contact (default)

[Edit](#) [...](#)

Deal stage tracker ⓘ

New association stage tracker card - (08/29/2025 5:26 PM)

[Edit](#) [...](#)

Activities card ⓘ

New activities card - (08/29/2025 5:52 PM)

[Edit](#) [...](#)

Breeze record summary ⓘ

Breeze Copilot record summary (default)

[Edit](#) [...](#)

Companies ⓘ

Companies Association card (default)

[Edit](#) [...](#)

Lead stage tracker ⓘ

Lead stage tracker (default)

[Edit](#) [...](#)

Deals ⓘ

Deals Association card (default)

[Edit](#) [...](#) [...](#)



< Contacts

Actions ▾



Marcus Ostberg

Director of Sales at StartupVentures
marcus.ostberg@startupventures.
io

Note Email Call Task Meeti... More

▼ Contact Context

Actions ▾

Email

marcus.ostberg@startupventures.io

Job title

Director of Sales

Phone number

(555) 987-6543

Contact owner

Cora Zenaty

Last contacted

07/15/2025 6:45 AM PDT

City

Boston

State/Region

Massachusetts

Country/Region

United States

LinkedIn URL

--

Overview

Activities

Intelligence

Data highlights

CREATE DATE

08/28/2025 2:30 PM PDT

LAST ACTIVITY DATE

09/03/2025 5:00 AM PDT

RECENT SALES EMAIL CLICKED DATE

--

LEGAL BASIS FOR PROCESSING
CONTACT'S DATA

Legitimate interest - Lead

Demo Feedback

DEMO FEEDBACK

--

DEMO STATUS

Not Scheduled

Tickets

+Add

No associated objects of this type exist or you don't have permission to view them.

Deal stage tracker

No associated objects of this type exist.

Activities card

Search activities



Collapse all ▾

(5) Activity ▾

All time

> Breeze record summary

▼ Companies (1)

+Add

Primary

StartupVentures

startupventures.io

Phone: --

Budget Approver

[View associated Company](#)

▼ Leads (1)

+Add

Primary

Marcus Ostberg

Owner: Cora Zenaty

Lead type: New Business

Stage: New ▾ (Lead pipeline)

Created on 08/29/2025 10:56 AM PDT



▼ Deals (0)

+Add



[Exit](#)[Save](#)[Save and exit](#)[Edit layout](#)[Settings](#)[Assign teams](#)

Sales Essentials ⓘ
New property list card - (09/05/2025 3:5...)  

Contact Context ⓘ
About this contact (default)  

Account Details ⓘ
New property list card - (09/05/2025 3:5...)  

[Overview](#) ⓘ [Activities](#) [Intelligence](#)  [Change tab order](#)

Recent Engagement ⓘ
New data highlight card - (09/05/2025 4:30 PM)  

Demo Feedback ⓘ
New data highlight card - (08/28/2025 8:52 PM)  

Allbound Timeline ⓘ
Allbound Timeline - Contact (default) 

Deal stage tracker ⓘ
New association stage tracker card - (08/29/2025 5:26 PM)  

Activities card ⓘ
New activities card - (08/29/2025 5:52 PM)  

Breeze record summary ⓘ
Breeze Copilot record summary (default) 

Companies ⓘ
Companies Association card (default)  

Lead stage tracker ⓘ
Lead stage tracker (default) 

Deals ⓘ
Deals Association card (default)  

Association labels

*Settings > Data Management >
Objects > Select Object >
Associations tab*

- Create labels to identify relationships among records

Contacts

Setup Associations Lifecycle Stage Record Customization Preview Customization Index Customization [View Con...](#)

Manage associations in the data model builder
This page is going away soon. You can now manage associations, labels, and limits — all in the data model builder. [Open data model builder](#)

Use associations to identify and track the connections between your objects. [Learn more](#)

Select object association: Contacts-to-Companies ▾ Reverse

Association limits

- Each Contact can be associated to **many Companies**.
- Each Company can be associated to **many Contacts**.

Label ▾	Limits ⓘ ▾	Object Association	Created By HubSpot
Advisor (Many)	1-to-many	Companies	No
Billing Contact (Many)	1-to-many	Companies	Yes
Budget Approver (Many)	1-to-many	Companies	No

Create and configure ▾
Configure association limit
Set limits for unlabeled associations. [Learn more](#)

Create and configure label limits
Specify the relationship between associated records and set limits for labeled associations.



Data Management



Properties



Object Library



Objects



Contacts



Companies



Leads



Deals



Tickets



Products



Payment Links



Quotes



Subscriptions



Projects



Services



Courses



Listings



Appointments



Invoices



Forecast



Activities

Contacts

Setup

Associations

Lifecycle Stage

Record Customization

Preview Customization

Index Customization

View Con...

Manage associations in the data model builder

This page is going away soon. You can now manage associations, labels, and limits — all in the data model builder.

[Open data model builder](#)

Use associations to identify and track the connections between your objects. [Learn more](#)

Select object association

Contacts-to-Companies

Reverse

Association limits

- Each Contact can be associated to **many Companies**.
- Each Company can be associated to **many Contacts**.

Search



Filter by:

All label limits

All users

Create and configure

Label	Limits	Object Association	Created By HubSpot	Used In
Advisor (Many)	1-to-many	Companies	No	8
Billing Contact (Many)	1-to-many	Companies	Yes	0
Contractor (Many)	1-to-many	Companies	No	8

Search HubSpot

Contacts Actions

Priya Khan
Vice President of Operations
at TechCorp Industries
priya.khan@techcorp-industries.com

Note Email Call Task Meeti... More

Sales Essentials Actions

Last Engagement Date
--

Last activity date
09/03/2025 5:00 AM PDT

[DX] Fit Score
--

[DX] Engagement Score
--

Now in Sequence
--

Contact Context Actions

Recent Engagement

RECENT SALES EMAIL CLICKED DATE	RECENT SALES EMAIL OPENED DATE	LAST PAGE SEEN
--	--	--

LAST ENGAGEMENT DATE
--

Demo Feedback

DEMO FEEDBACK	DEMO STATUS
Very impressed with the automation capabili...	Completed

Allbound Timeline

All time All activities Activity assigned to HubSpot team

Sep 2025 Today

Outbounds			Task		
Fern Bab...			Task		
Inbounds					
Priya Khan					

Mon 1 Tue 2 Wed 3 Thu 4 Today

Breeze record summary

Companies (1) +Add

Primary
TechCorp Industries
techcorp-industries.com

Phone: --

[View associated Company](#)

Leads (1) +Add

Primary
Priya Khan

Owner: Cora Zenaty

Lead type: New Business

Stage: Qualified (Lead pipeline)

Qualified on 8/29/2025 and TechCorp Industries - Enterprise Automation Platform Implementation created

Search HubSpot Search +

📞 📈 ⚙️ 💡 Assistant Fern Baby Fern

Contacts Actions

Marcus Ostberg
Director of Sales at StartupVentures
marcus.ostberg@startupventures.io

Note Email Call Task Meeti... More

Overview Activities Intelligence

Recent Engagement

RECENT SALES EMAIL CLICKED DATE	RECENT SALES EMAIL OPENED DATE	LAST PAGE SEEN
--	--	--

LAST ENGAGEMENT DATE
--

Sales Essentials Actions

Last Engagement Date
--

Last activity date
09/03/2025 5:00 AM PDT

[DX] Fit Score
--

[DX] Engagement Score
--

Now in Sequence
--

Allbound Timeline

All time All activities Activity assigned to HubSpot team

Outbounds Fern Bab... Task

Inbounds Marcus O...

Mon 1 Tue 2 Wed 3 Thu 4 Today Sat 6

Contact Context Actions

Email marcus.ostberg@startupventures.io

Job title Director of Sales

Phone number

Activities card

Search activities Q

(5) Activity × All time

> Cora Zenaty was assigned a task Overdue: Sep 3, 2025 at 5:00 AM PDT

Follow up with Marcus Ostberg

Companies (1) +Add

Primary
StartupVentures
[startupventures.io](#)

Phone: --
Budget Approver

[View associated Company](#)

Leads (1) +Add

Primary
Marcus Ostberg

Owner: Cora Zenaty ⓘ
Lead type: N
Stage: ⓘ
Created: Sep 3, 2025



Your Framework for Data Clarity

01 Audit with purpose: Look at your current records through your team's eyes, not an admin's eyes.

02 Customize for roles: Different teams need different information prominently displayed.

03 Label relationships strategically: Make connections meaningful, not just functional.

04 Test with real users: Get feedback from the people who actually use the records daily.

Wrap-Up and Resources

What's New for HubSpot Smart CRM



...and more!

- **Conversational enrichment:** self-generating CRM data and AI-powered smart properties
- **Smart Insights:** AI catch-up cards on records, Smart Digest trend reports on record index pages, Column Insights to uncover data patterns
- **Flexible CRM views:** Gantt chart, calendar, and map visualizations for CRM index pages
- HubSpot connectors for **ChatGPT** and **Claude**
- **Sensitive data masking:** automatically identifies and hides potentially sensitive information
- **Smart Transfer tool:** guides users through 3rd party data migration to HubSpot

hubspot.com/spotlight
hubspot.com/new

*Demo stations on the main conference floor



Questions?

INBOUND

Resources

- Session workbook and slides
- HubSpot community AMA
- Smart CRM resources
- Additional Academy learning



Please rate our session!

We hope you enjoyed today's session.

Please head to the INBOUND mobile app
to provide your feedback.



Thank You!