INBOUND

Lab: From Data Chaos to Clarity With HubSpot Smart CRM

Brenna Zenaty and Aaron Schmaltz

Hello and Welcome!

Brenna Zenaty

Senior Professor,
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?

IN 25

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

IN 25

Why is unifying your data important?

IN 25

The world has changed. Your CRM should too.

The Challenge

The Impact

The Solution

Today's Goal

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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The Impact

Marketing misses targets, sales works inefficiently, service scrambles without context, and leadership decides on incomplete insights.

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HubSpot's Smart CRM unifies your customer data, teams, and tech stacks to create personalized experiences at scale.

Today's Goal

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Today's Goal

Learn how to transform your CRM from a data graveyard into a growth engine.

Creating a Framework for Your Customer Data

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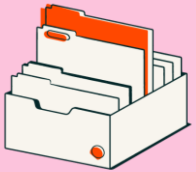
Data modeling is the process of structuring how your customer information connects and flows through your CRM to reflect real customer relationships rather than rigid organizational silos.

Why is data modeling important?

IN 25



59%

of organizations lack a unified data strategy

95%

of IT leaders report that integration challenges hinder AI adoption

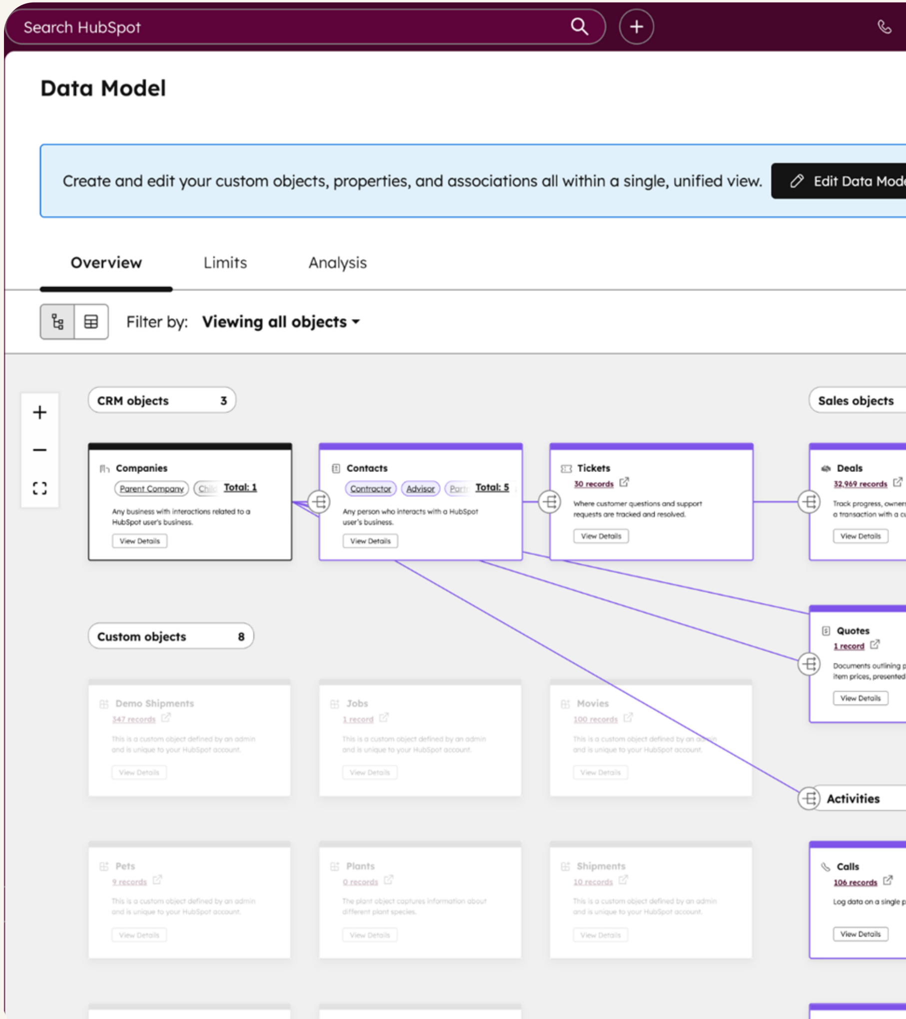
83%

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!

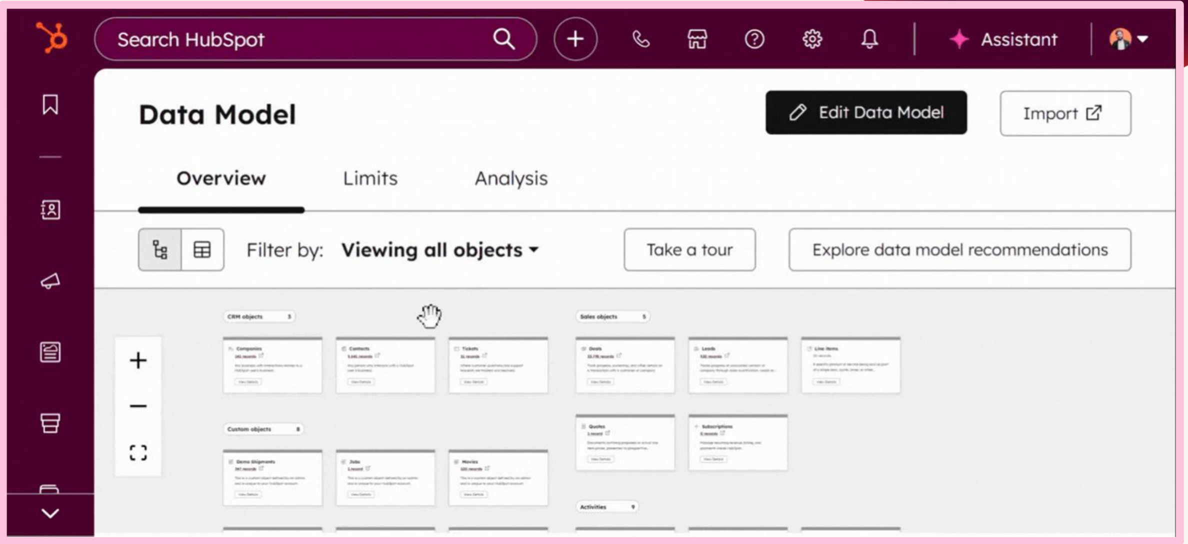
Log in to your HubSpot account, or -

download the session workbook here!

Overview Tab

Left Nav Bar > Data Model

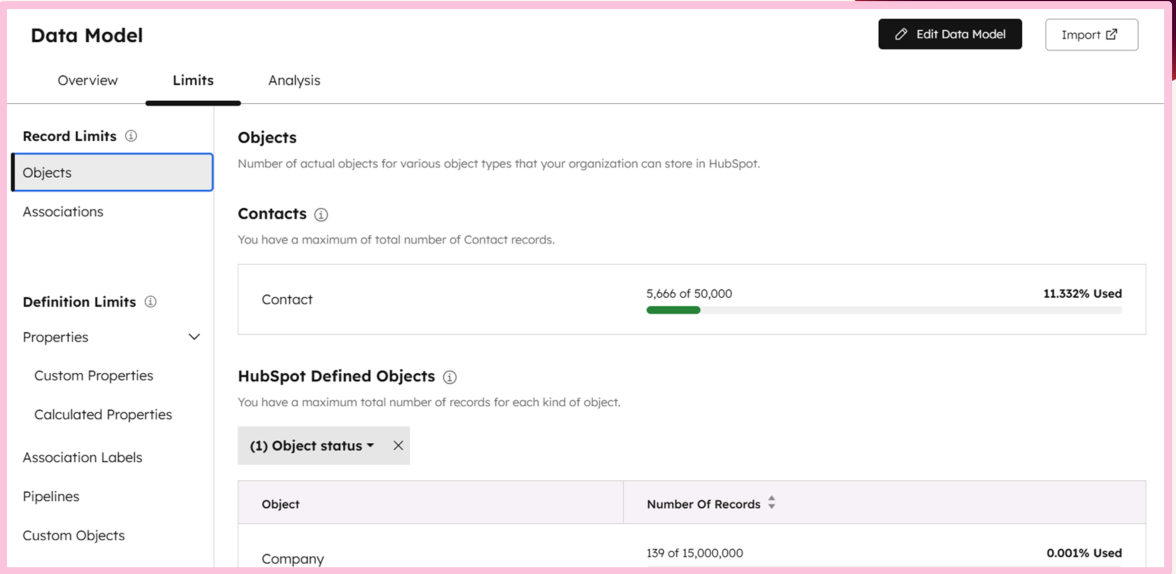
- Zoom in and out of objects
- Click an object to see its relationships
- Click "Details" to see usage, properties, and associations



Limits Tab

Left Nav Bar > Data Model

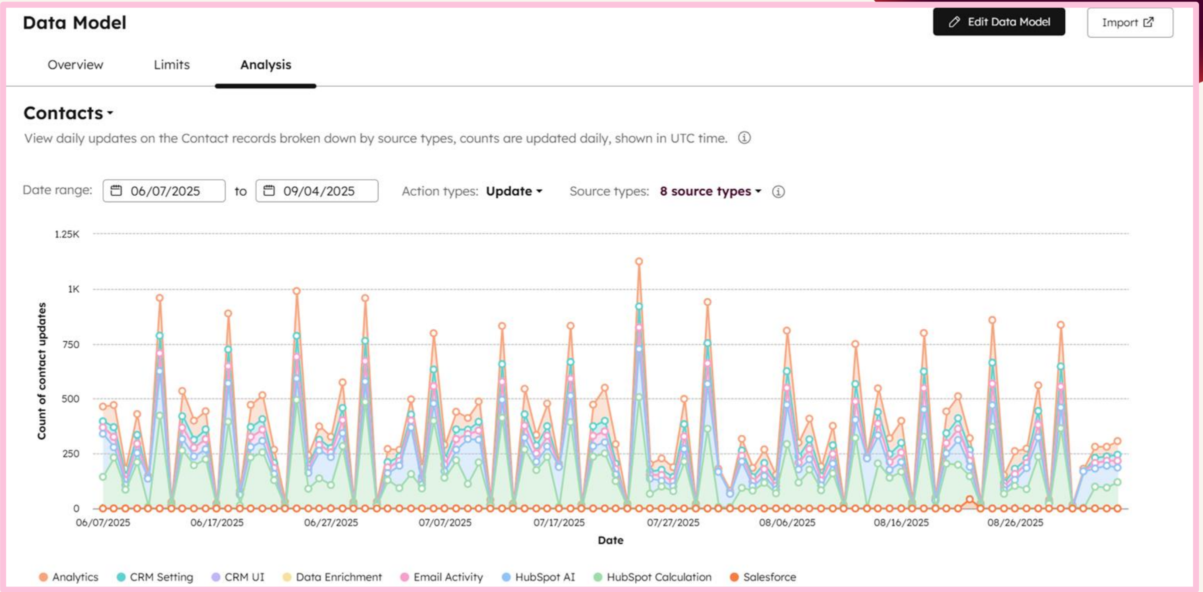
- View your object and property limit numbers
- View your association, custom object, and pipeline limit numbers
- Merge duplicates



Analysis Tab

Left Nav Bar > Data Model

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



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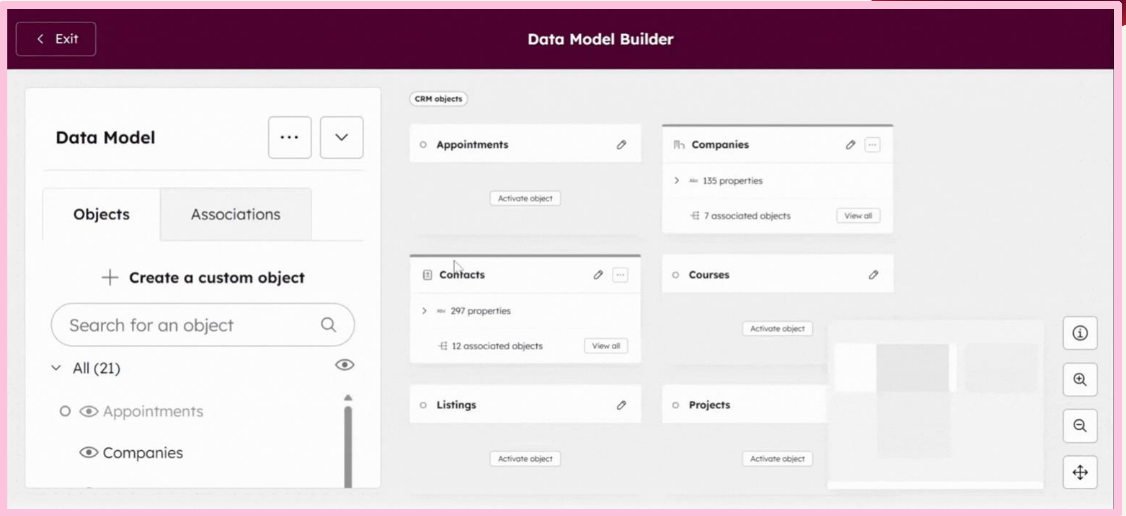
New!

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



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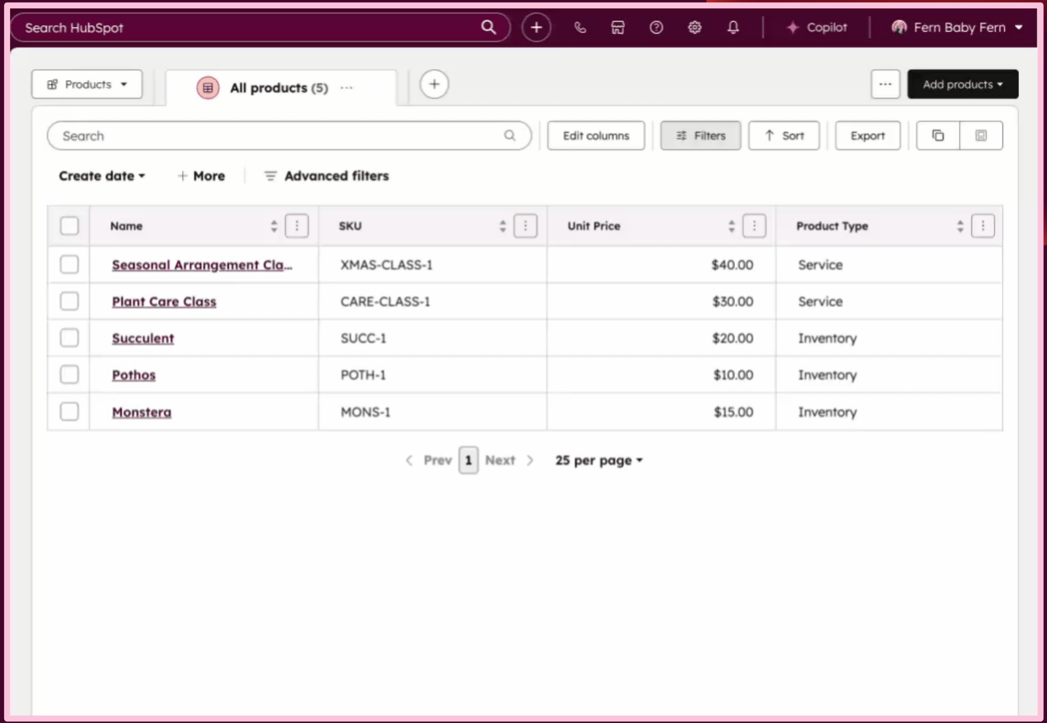
Other Tools to Know: Product library

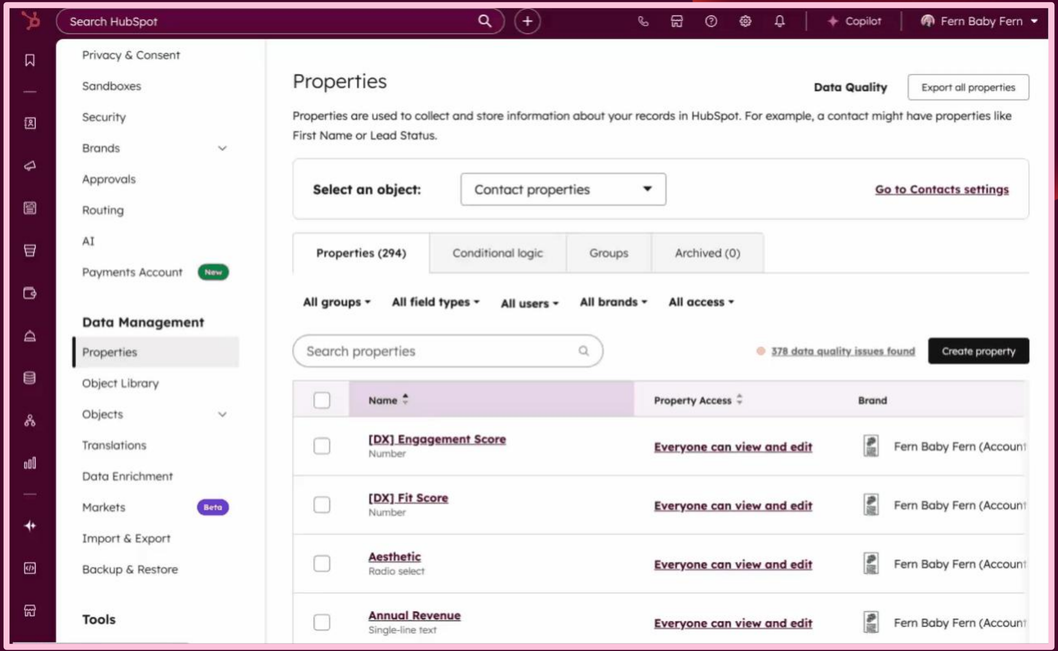
A centralized catalog of goods and services you sell; create once, then associate with deals, quotes, and invoices; tracks pricing, SKUs, and product details across your entire sales process.



Other Tools to Know:

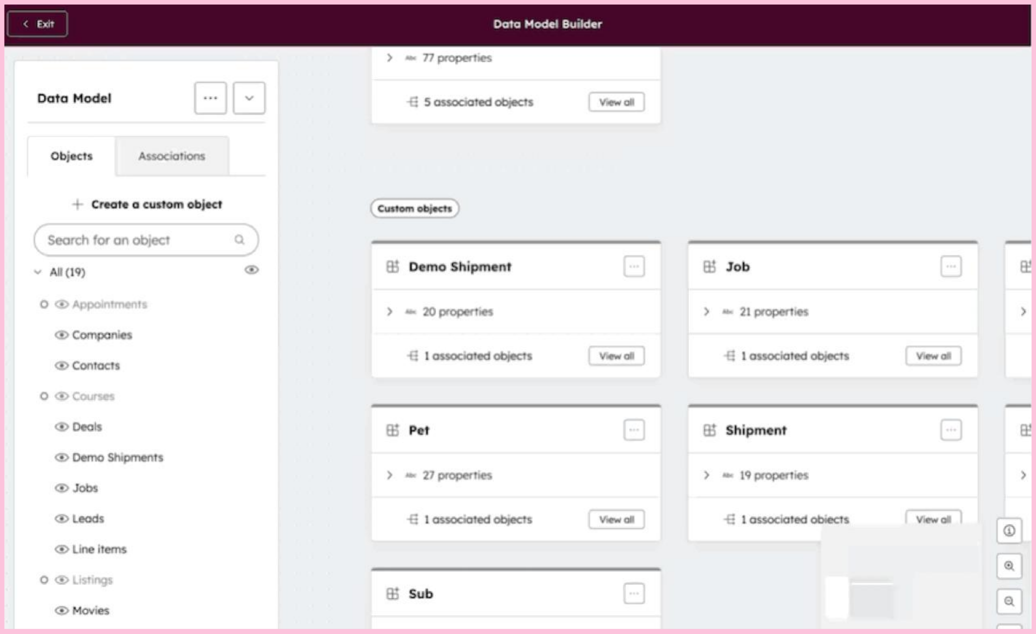
Custom properties

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.



Other Tools to Know:
Custom objects

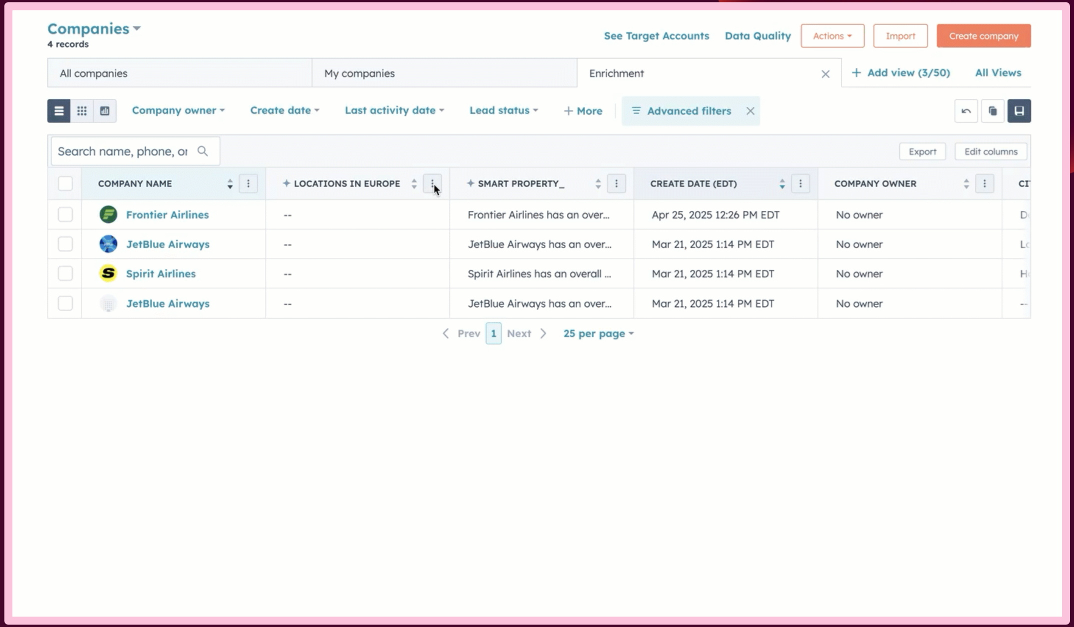
(Ent Only) Unique business entities that can't be managed with standard objects; use when you need to track business processes or relationships that need their own records and associations.



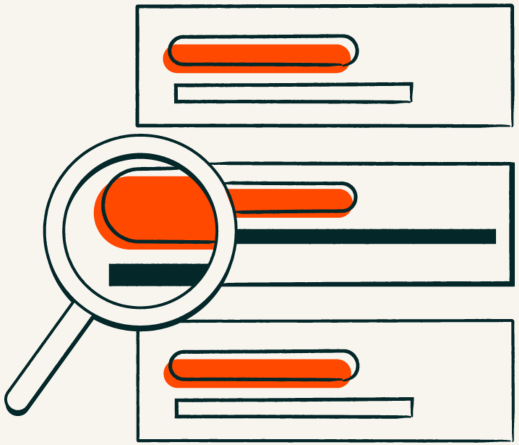
Other Tools to Know:

Smart properties

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



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

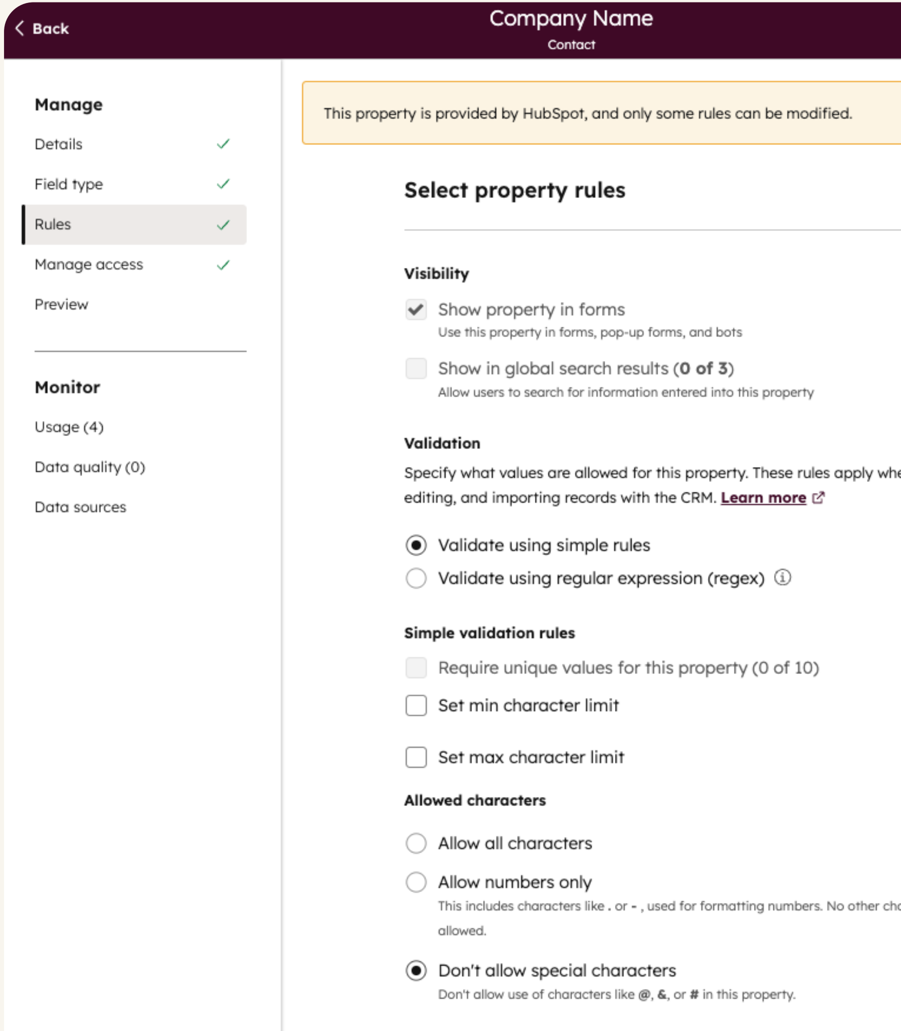
annually

(*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.



Let's explore!

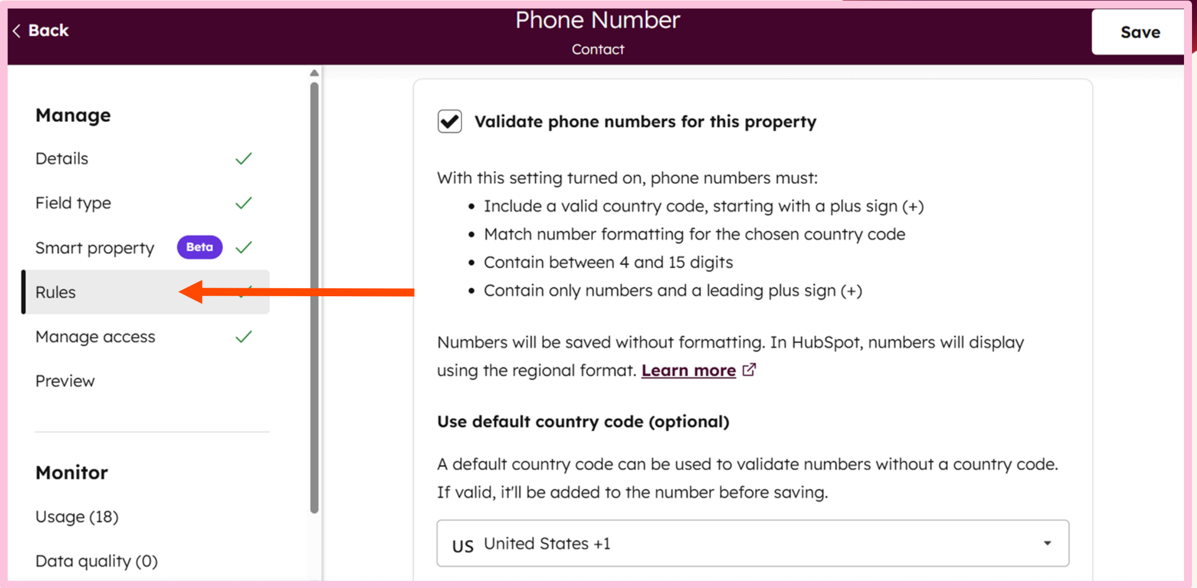
Log in to your HubSpot account, or -

download the session workbook here!

Data Validation

Settings > Properties > Contact Properties > Rules

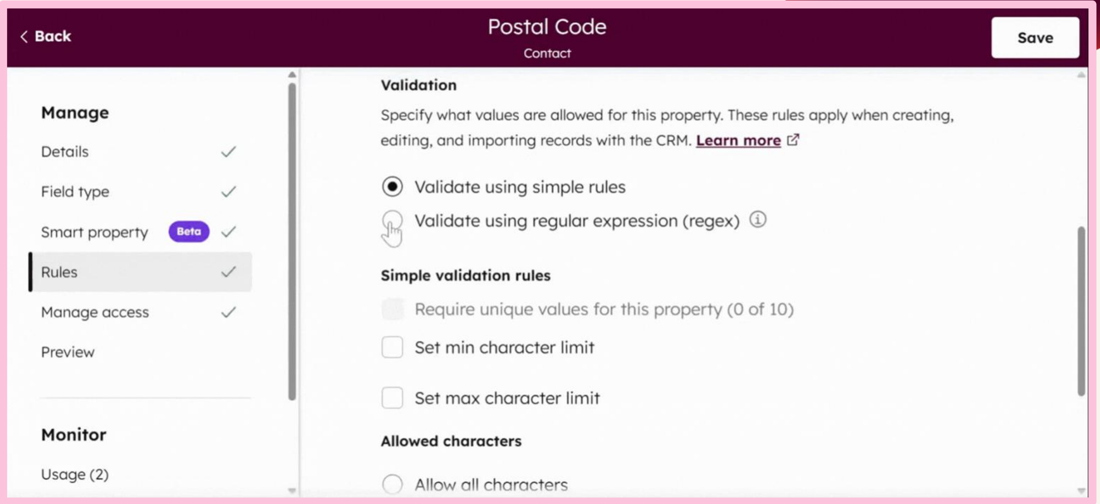
- Click **Rules** to apply data validation
- Click **Preview** to test your validation
- Different property types will have different data validation options



Regex/AI Validation

Settings > Properties > Contact Properties > Rules

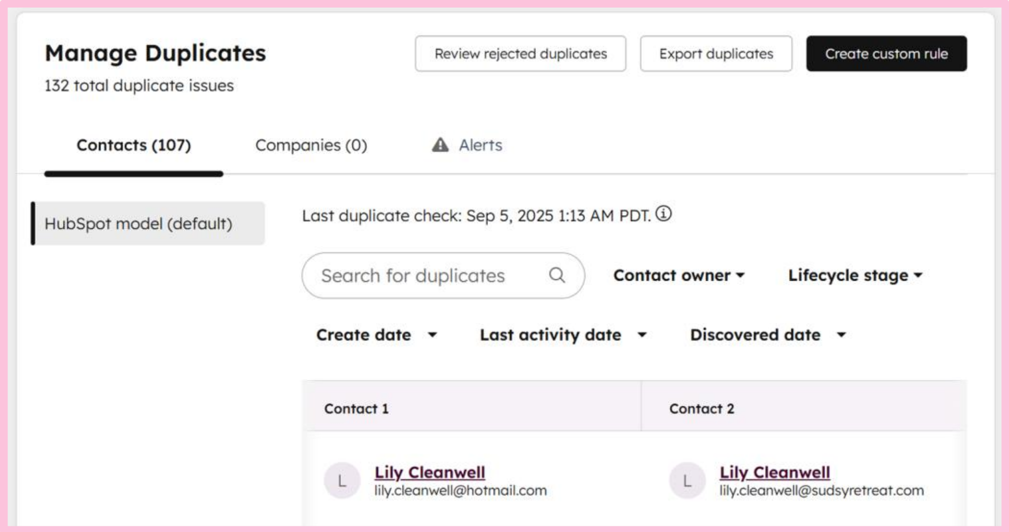
- Use Regex to validate complex data formats
- Use Breeze prompts to automatically generate Regex
- Preview and test your code



Duplicate Management

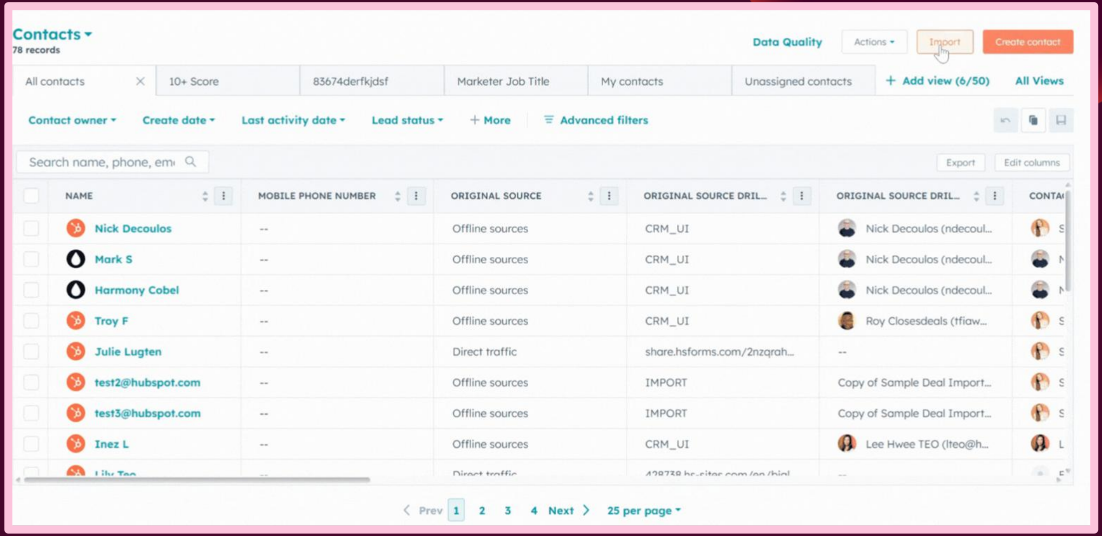
Left Nav Bar > Data Quality > Manage Duplicates

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



Other Tools to Know:

Data Import Tool

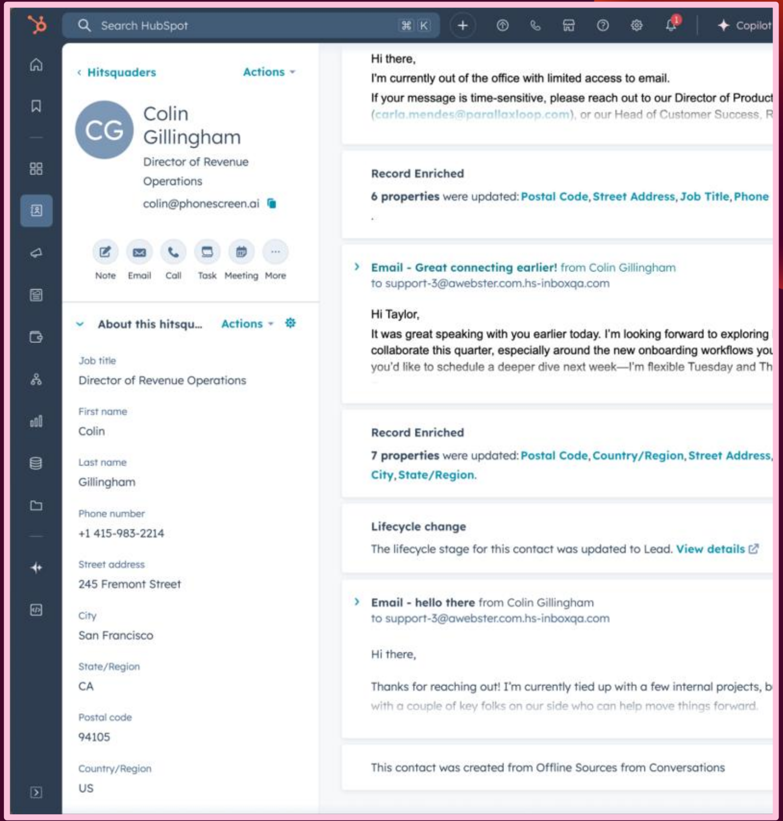


Bulk create and update CRM records by uploading spreadsheet files with built-in column mapping, error detection, and validation rule enforcement to ensure clean data enters your database.

Other Tools to Know:

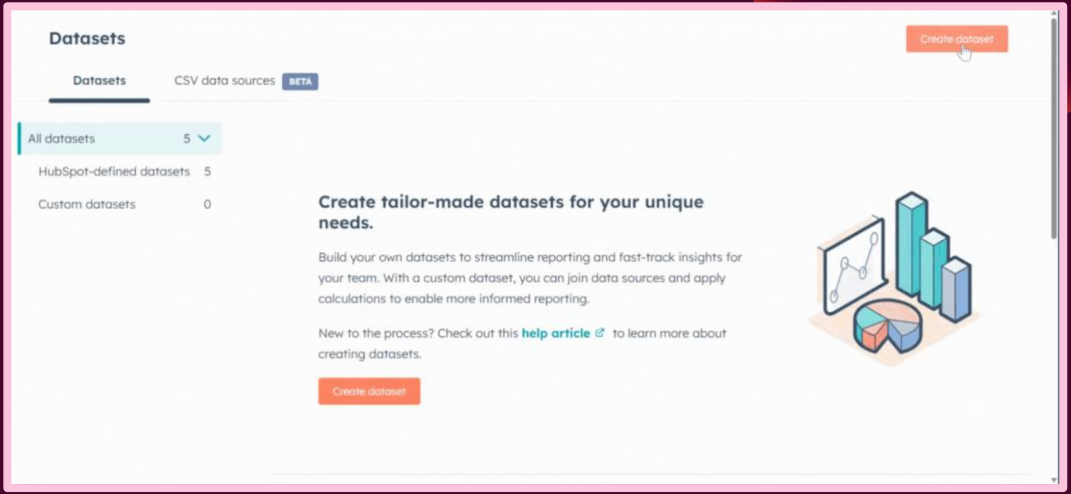
Data enrichment

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



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.



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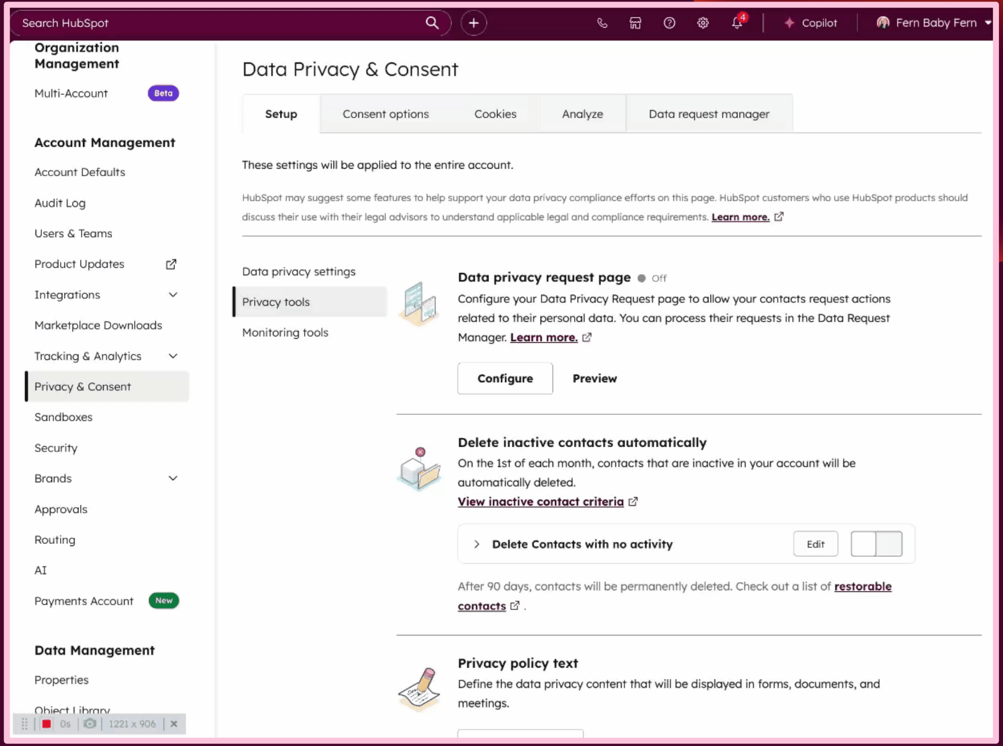
Other Tools to Know:
Sensitive data

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



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?

IN 25

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)

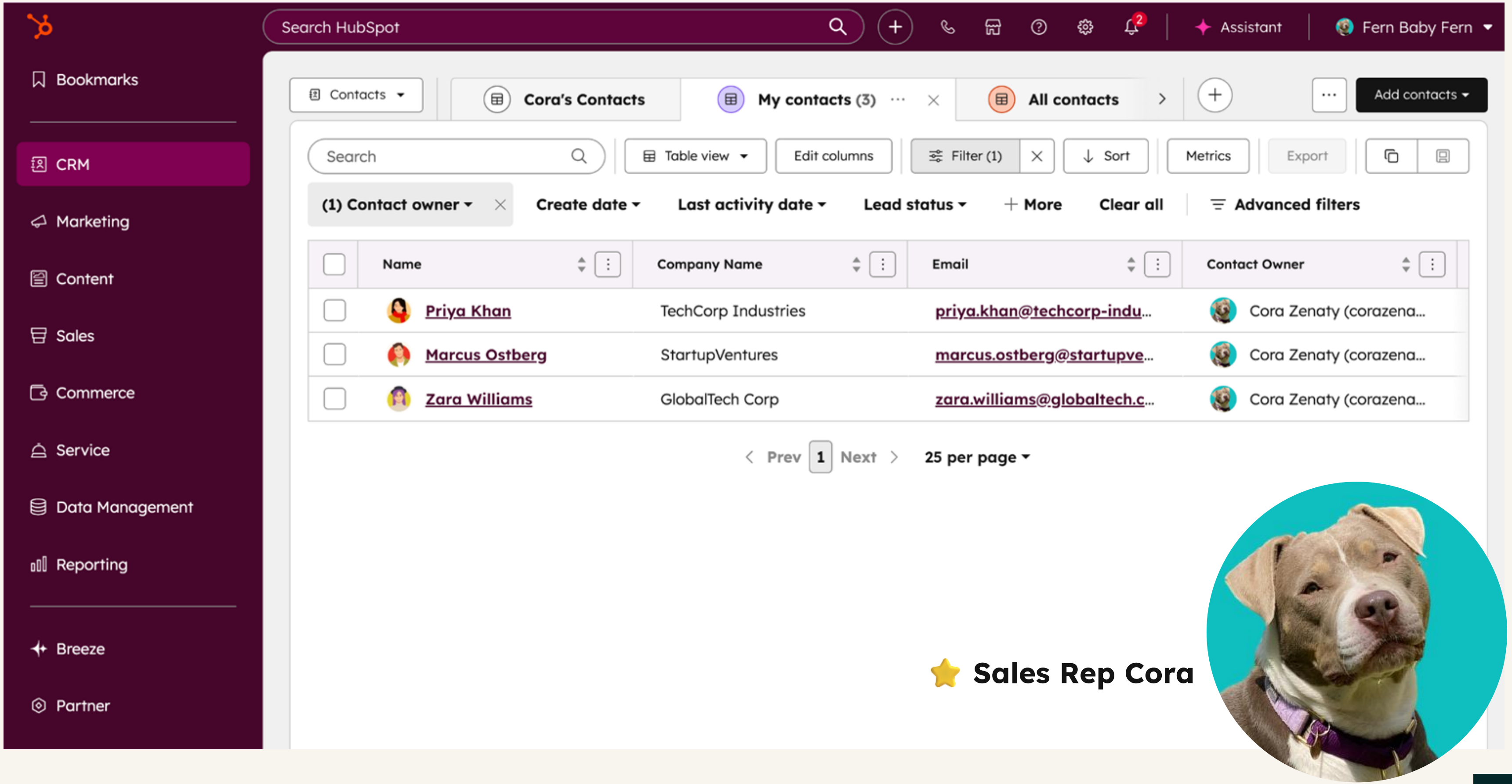
Our goal: help TechGrow Solutions (fictional B2B software company) enhance their team's CRM experience by reviving their record layouts and making their data more accessible and actionable.

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.

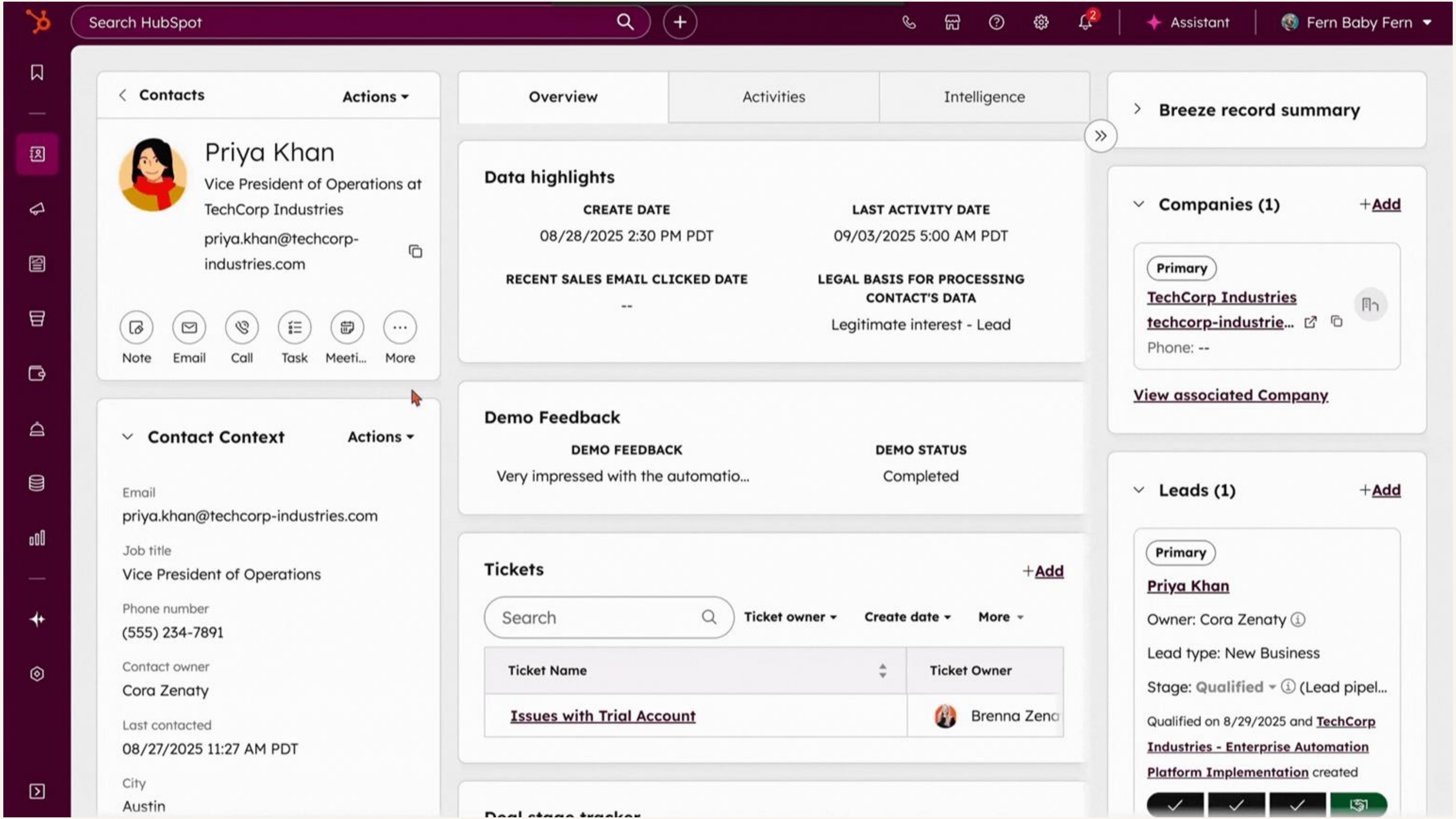
Your takeaway: a proven framework for CRM customization that you can immediately apply to improve your team's efficiency.

Download the session workbook here!



⭐ **Sales Rep Cora**

IN 25


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
08/28/2025 2:30 PM PDT
LAST ACTIVITY DATE
09/03/2025 5:00 AM PDT
RECENT SALES EMAIL CLICKED DATE
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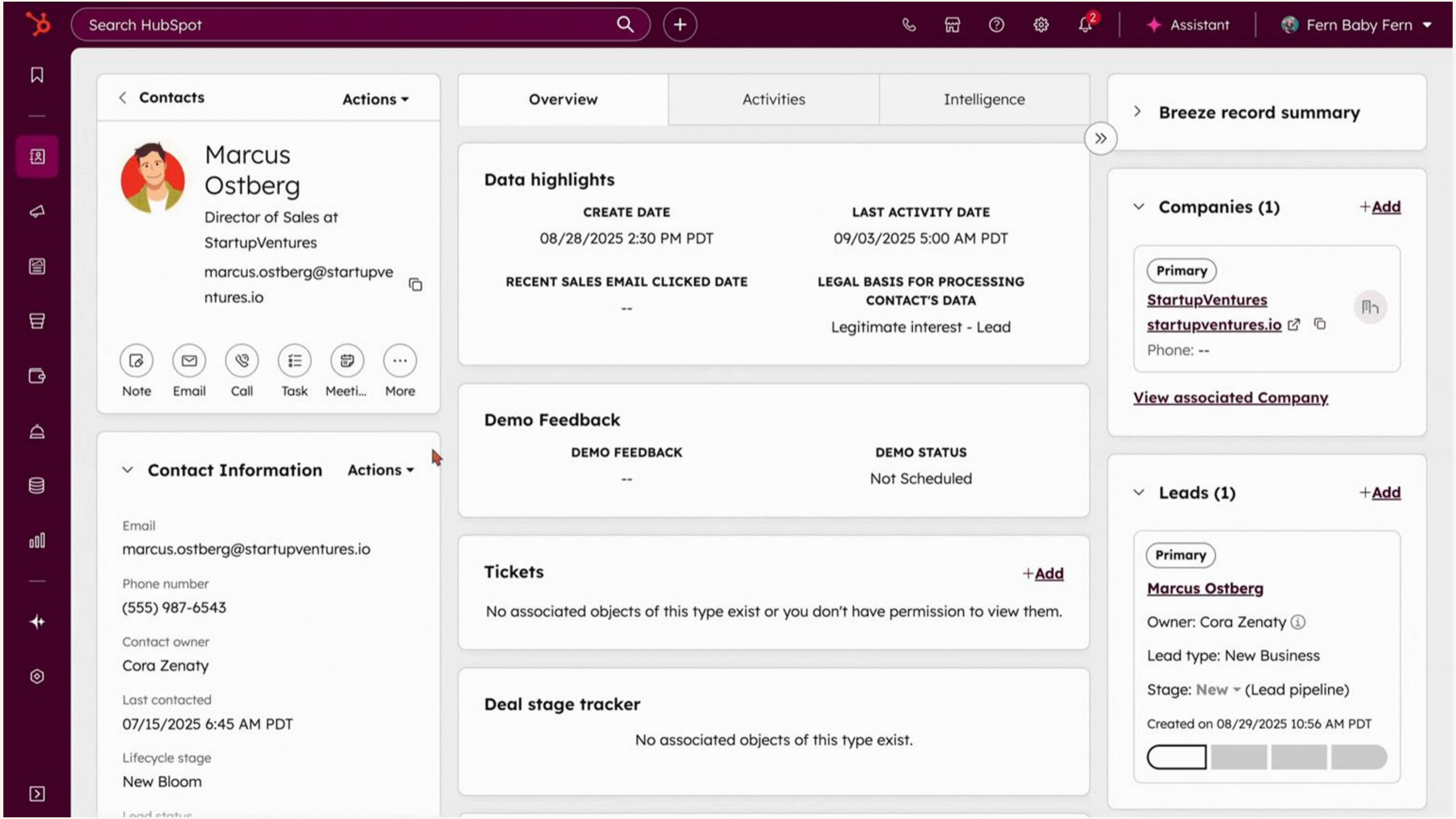
LEGAL BASIS FOR PROCESSING CONTACT'S DATA
Legitimate interest - Lead
Demo Feedback
DEMO FEEDBACK
Very impressed with the automatio...
DEMO STATUS
Completed
Tickets
+Add
Search
Ticket owner
Create date
More
Ticket Name
Ticket Owner
Issues with Trial Account
Brenna Zena
Breeze record summary
Companies (1)
+Add
Primary
TechCorp Industries
techcorp-industrie...
Phone: --
View associated Company
Leads (1)
+Add
Primary
Priya Khan
Owner: Cora Zenaty
Lead type: New Business
Stage: Qualified (Lead pipel...
Qualified on 8/29/2025 and TechCorp Industries - Enterprise Automation Platform Implementation created


Search HubSpot
Assistant
Fern Baby Fern
Contacts
Actions
Marcus Ostberg
Director of Sales at StartupVentures
marcus.ostberg@startupventures.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
Data highlights
CREATE DATE
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LEGAL BASIS FOR PROCESSING CONTACT'S DATA
Legitimate interest - Lead
Demo Feedback
DEMO FEEDBACK
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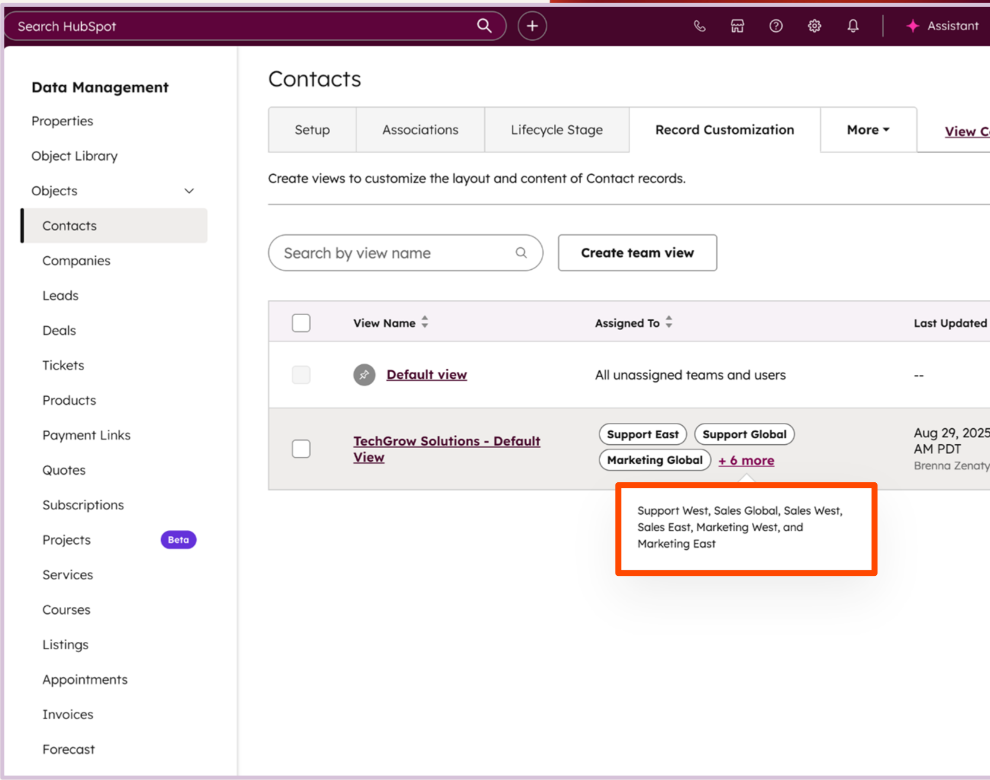
DEMO STATUS
Not Scheduled
Tickets
+Add
No associated objects of this type exist or you don't have permission to view them.
Deal stage tracker
No associated objects of this type exist.
Breeze record summary
Companies (1)
+Add
Primary
StartupVentures
startupventures.io
Phone: --
View associated Company
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

Record customization

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

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



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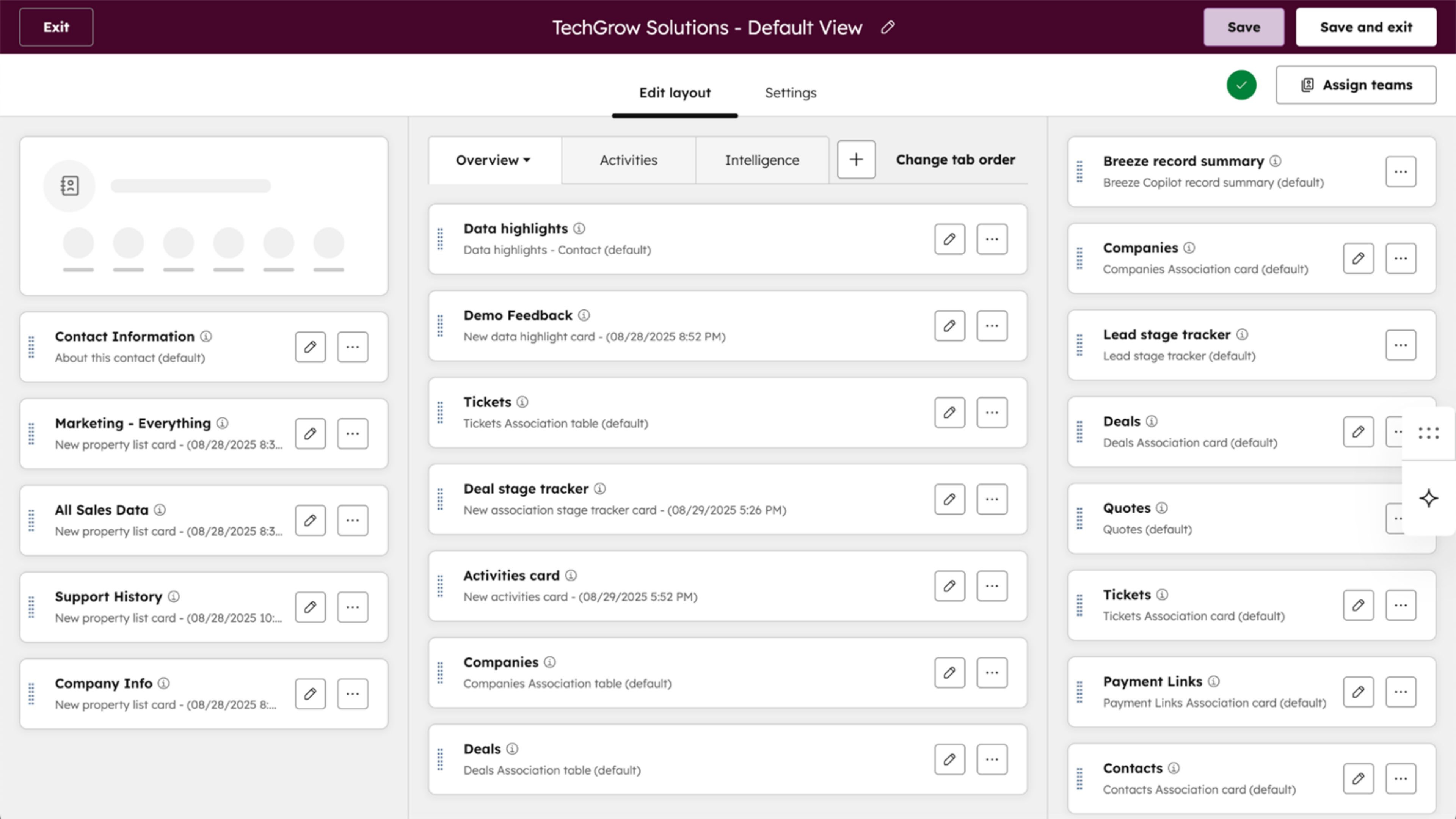
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TechGrow Solutions - Default View
Save
Save and exit
Edit layout
Settings
Assign teams
Contact Information
About this contact (default)
Marketing - Everything
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All Sales Data
New property list card - (08/28/2025 8:3...
Support History
New property list card - (08/28/2025 10:...
Company Info
New property list card - (08/28/2025 8:...
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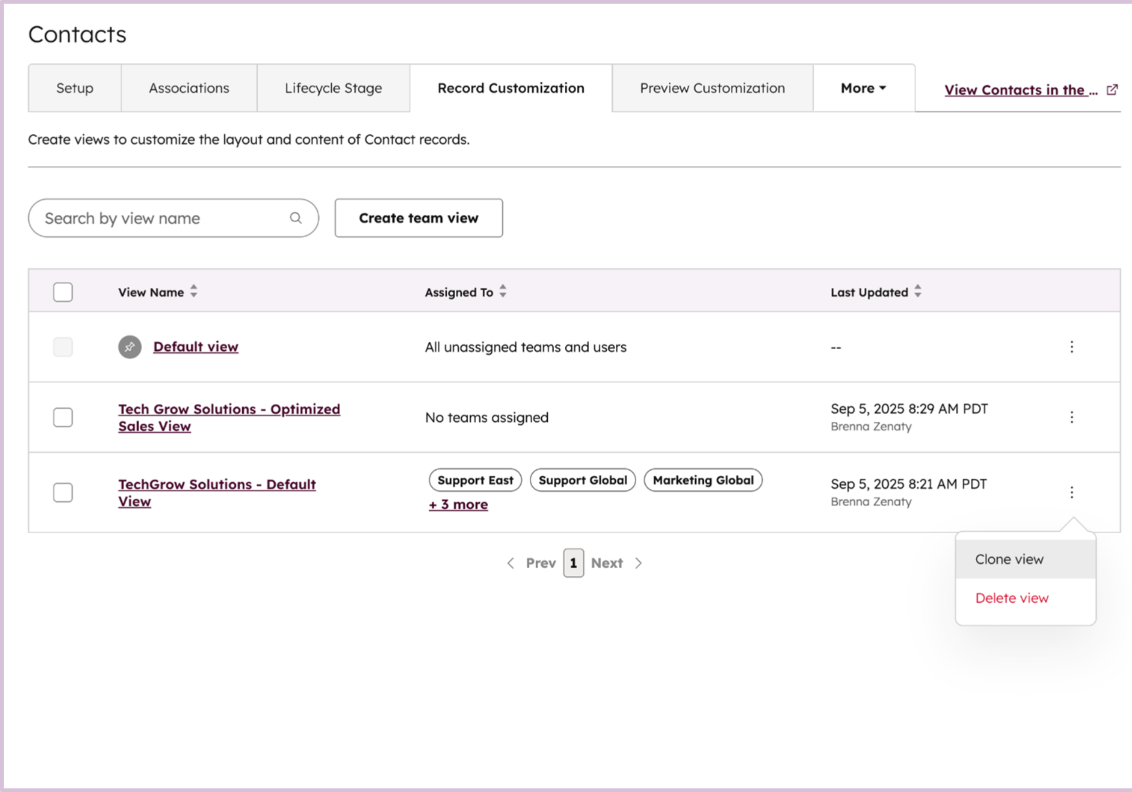
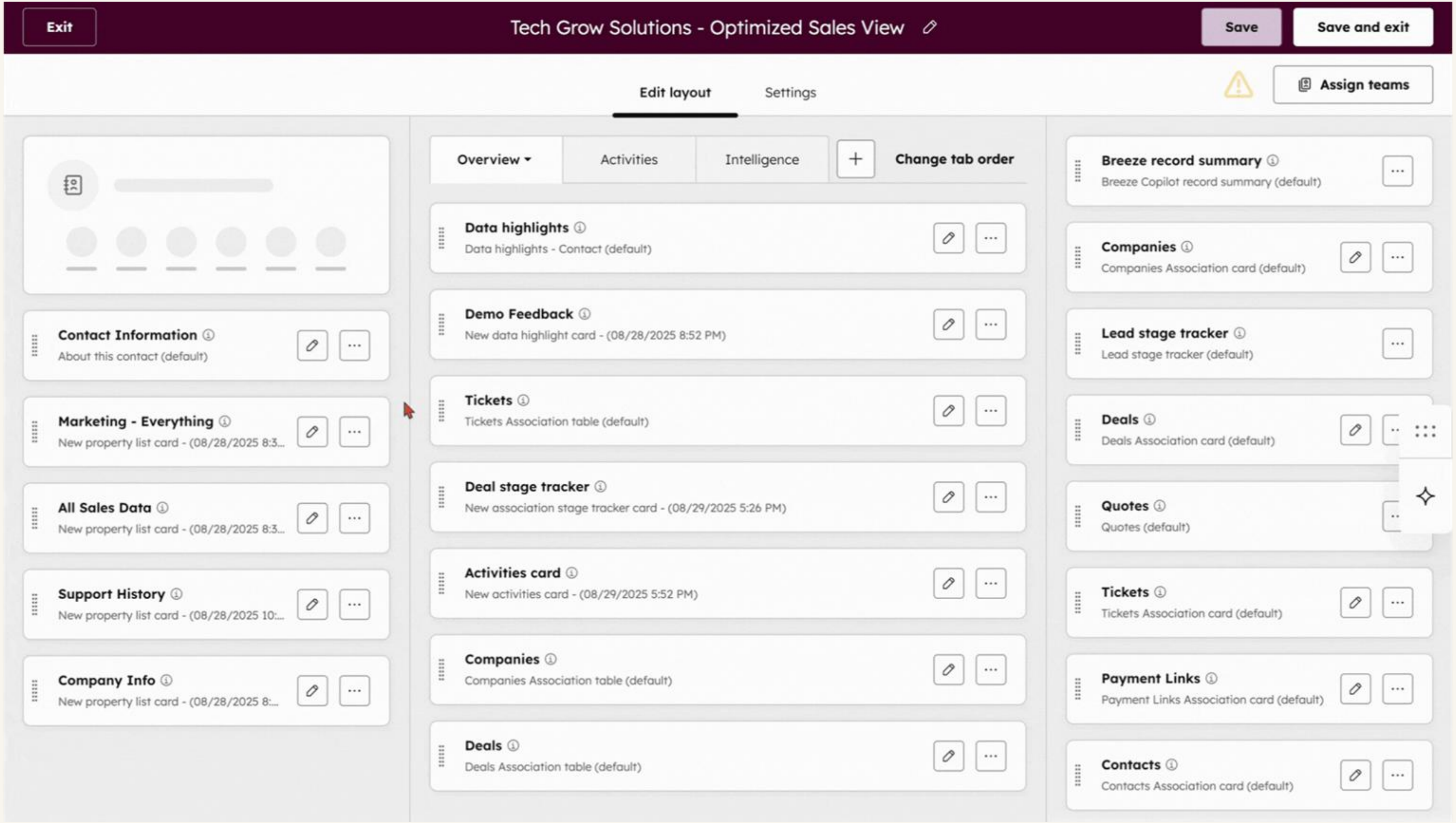
Deals
Deals Association card (default)
Quotes
Quotes (default)
Tickets
Tickets Association card (default)
Payment Links
Payment Links Association card (default)
Contacts
Contacts Association card (default)

Create team view

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

- Create a new team view
- Clone an existing view





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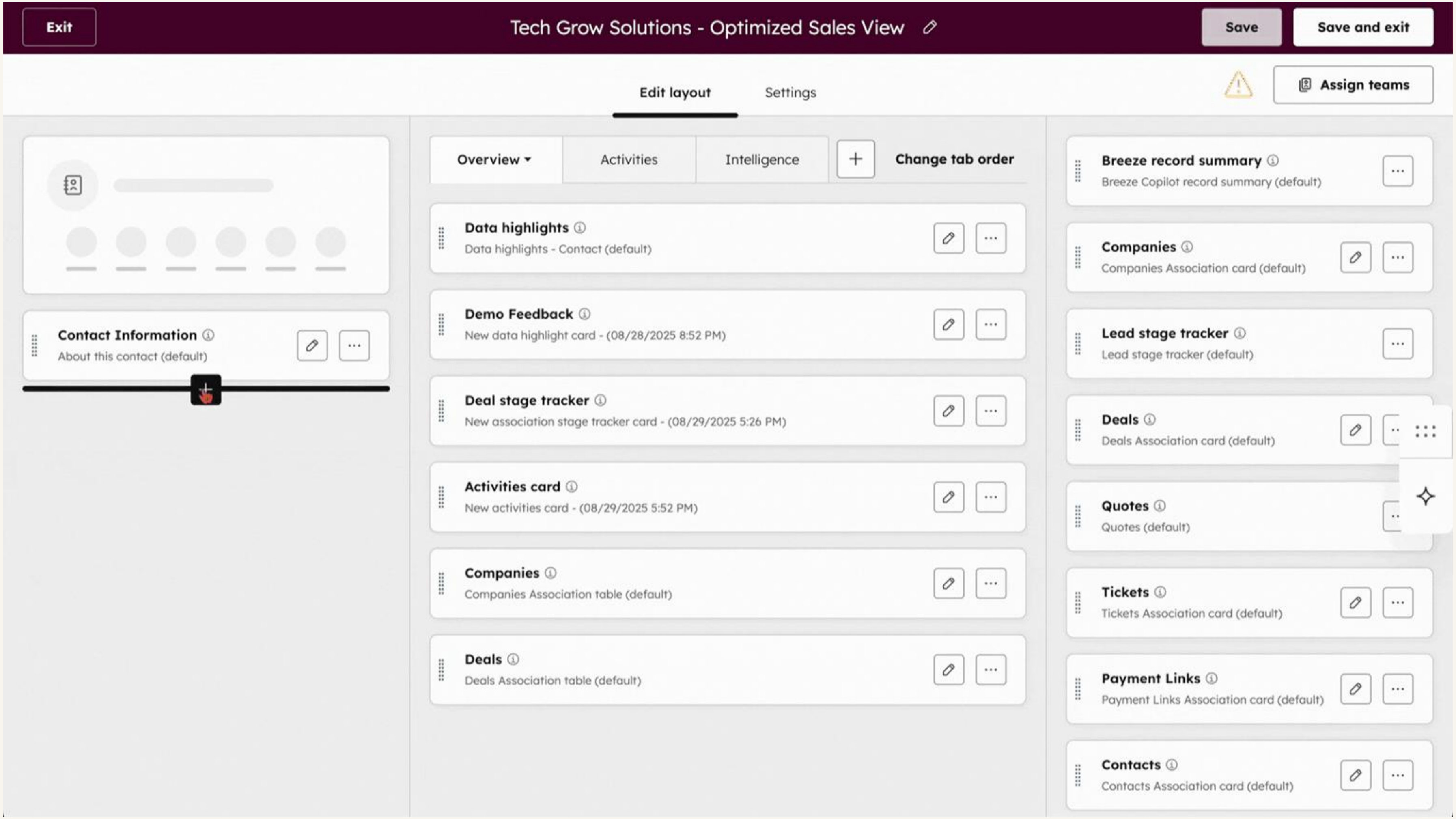
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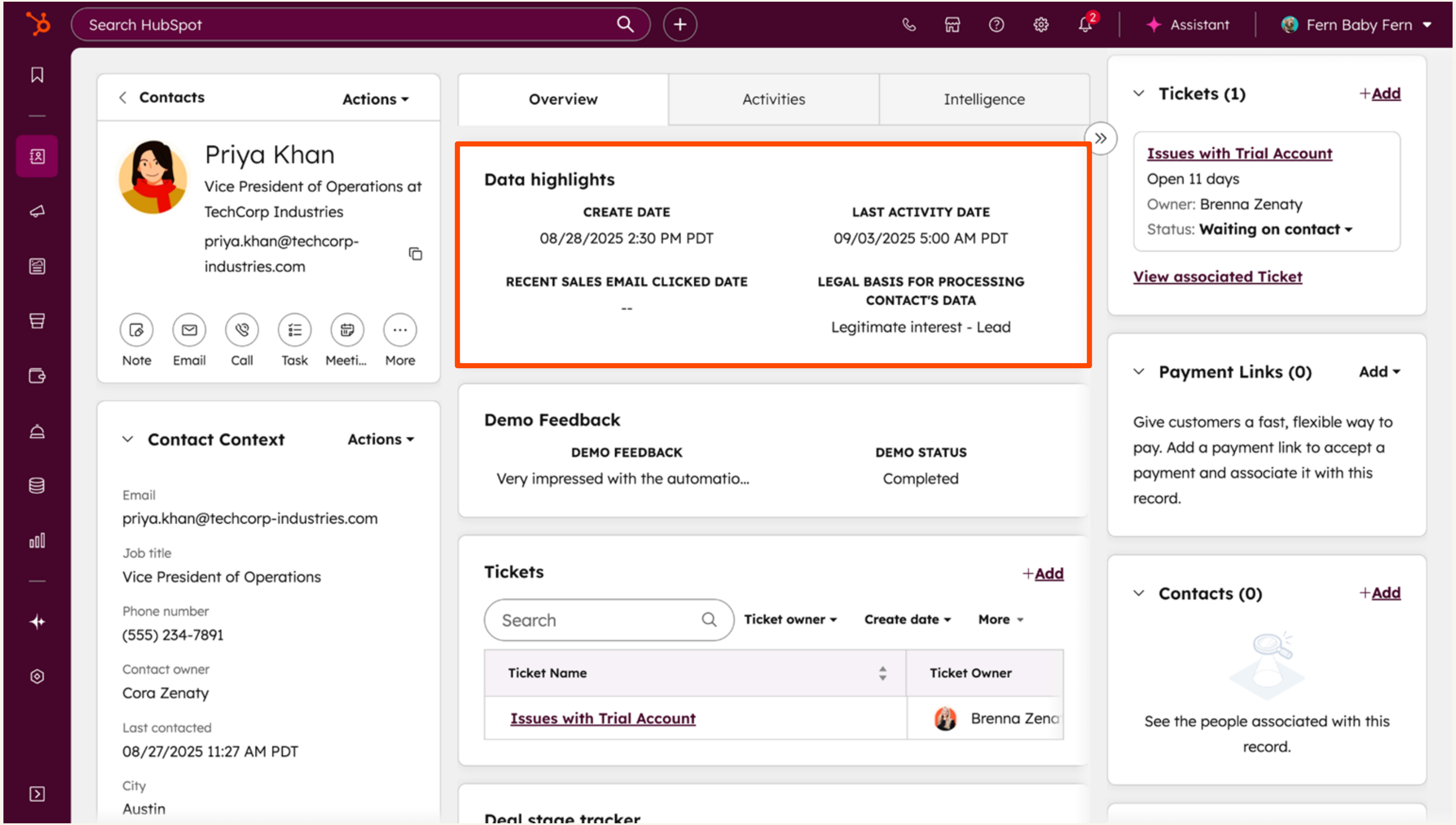
Search HubSpot
Assistant
Fern Baby Fern
Contacts
Actions
Priya Khan
Vice President of Operations at TechCorp Industries
priya.khan@techcorp-industries.com
Note
Email
Call
Task
Meeti...
More
Contact Context
Actions
Email
priya.khan@techcorp-industries.com
Job title
Vice President of Operations
Phone number
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Contact owner
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Demo Feedback
DEMO FEEDBACK
Very impressed with the automatio...
DEMO STATUS
Completed
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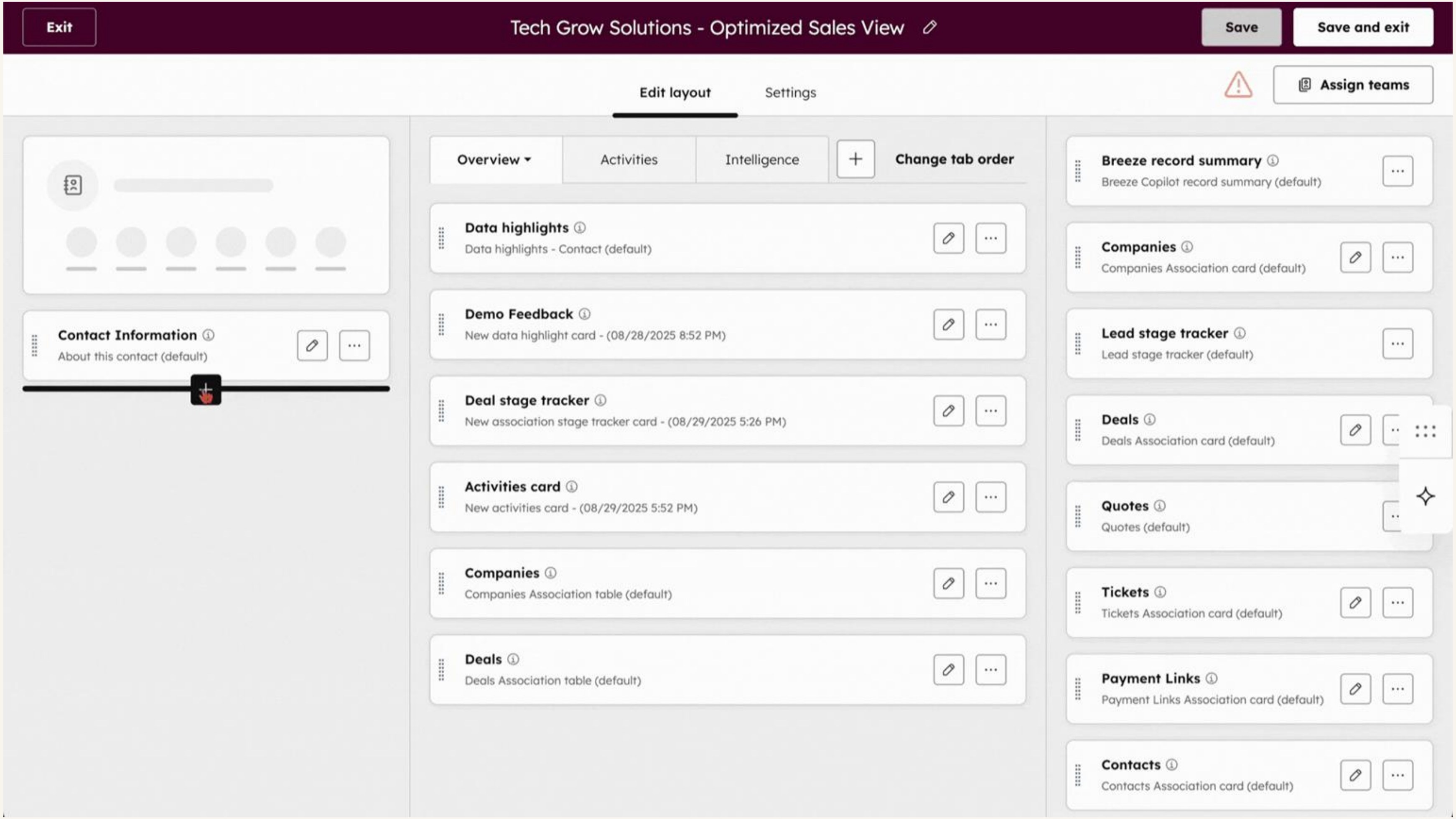
+Add
Search
Ticket owner
Create date
More
Ticket Name
Ticket Owner
Issues with Trial Account
Brenna Zena
Deal stage tracker
Tickets (1)
+Add
Issues with Trial Account
Open 11 days
Owner: Brenna Zenaty
Status: Waiting on contact
View associated Ticket
Payment Links (0)
Add
Give customers a fast, flexible 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.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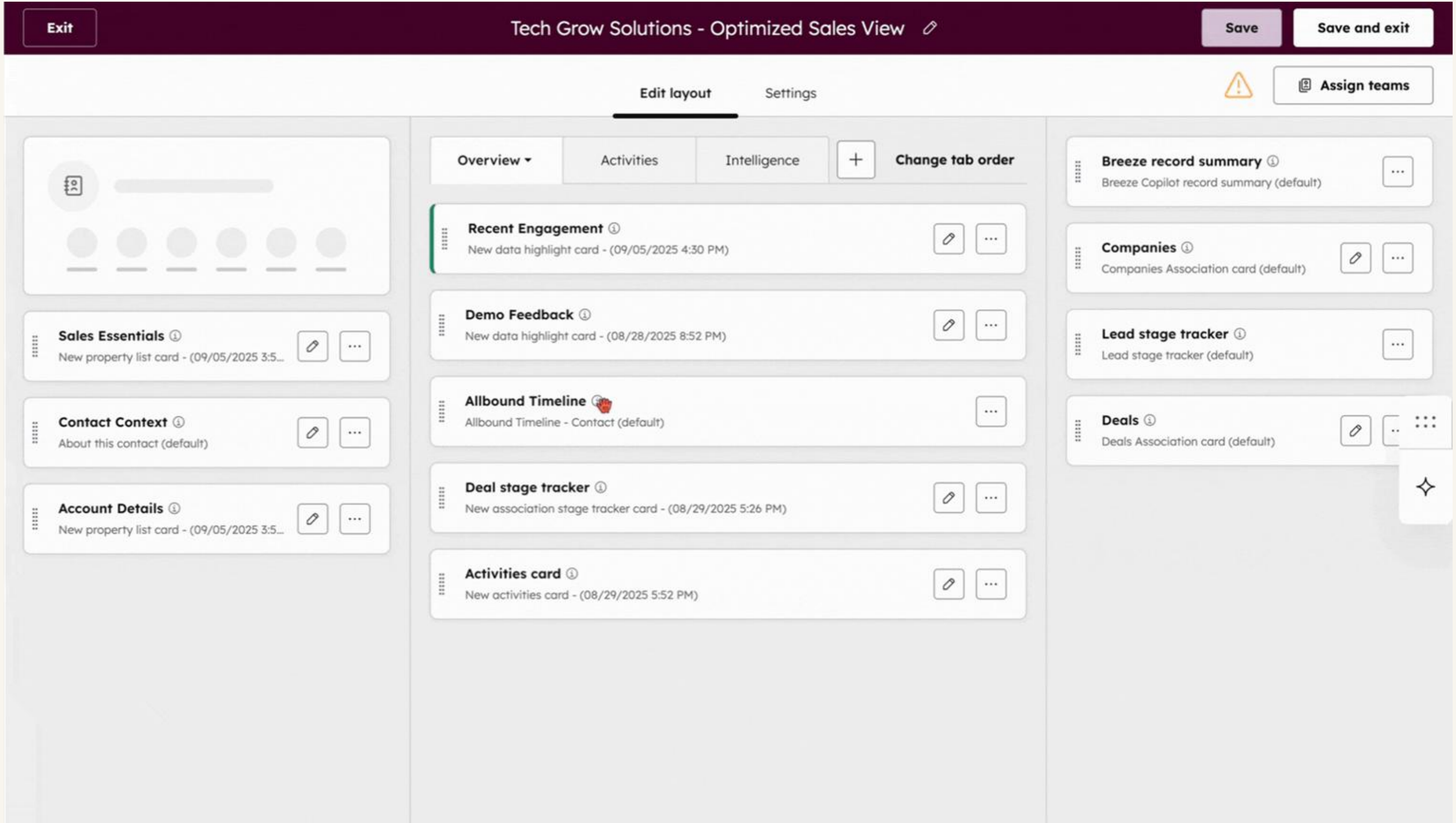
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Tech Grow Solutions - Optimized Sales View
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Save and exit
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Assign teams
Overview
Activities
Intelligence
Change tab order
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Contact Context
About this contact (default)
Account Details
New property list card - (09/05/2025 3:5...
Recent Engagement
New data highlight card - (09/05/2025 4:30 PM)
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New data highlight card - (08/28/2025 8:52 PM)
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Breeze Copilot record summary (default)
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Lead stage tracker
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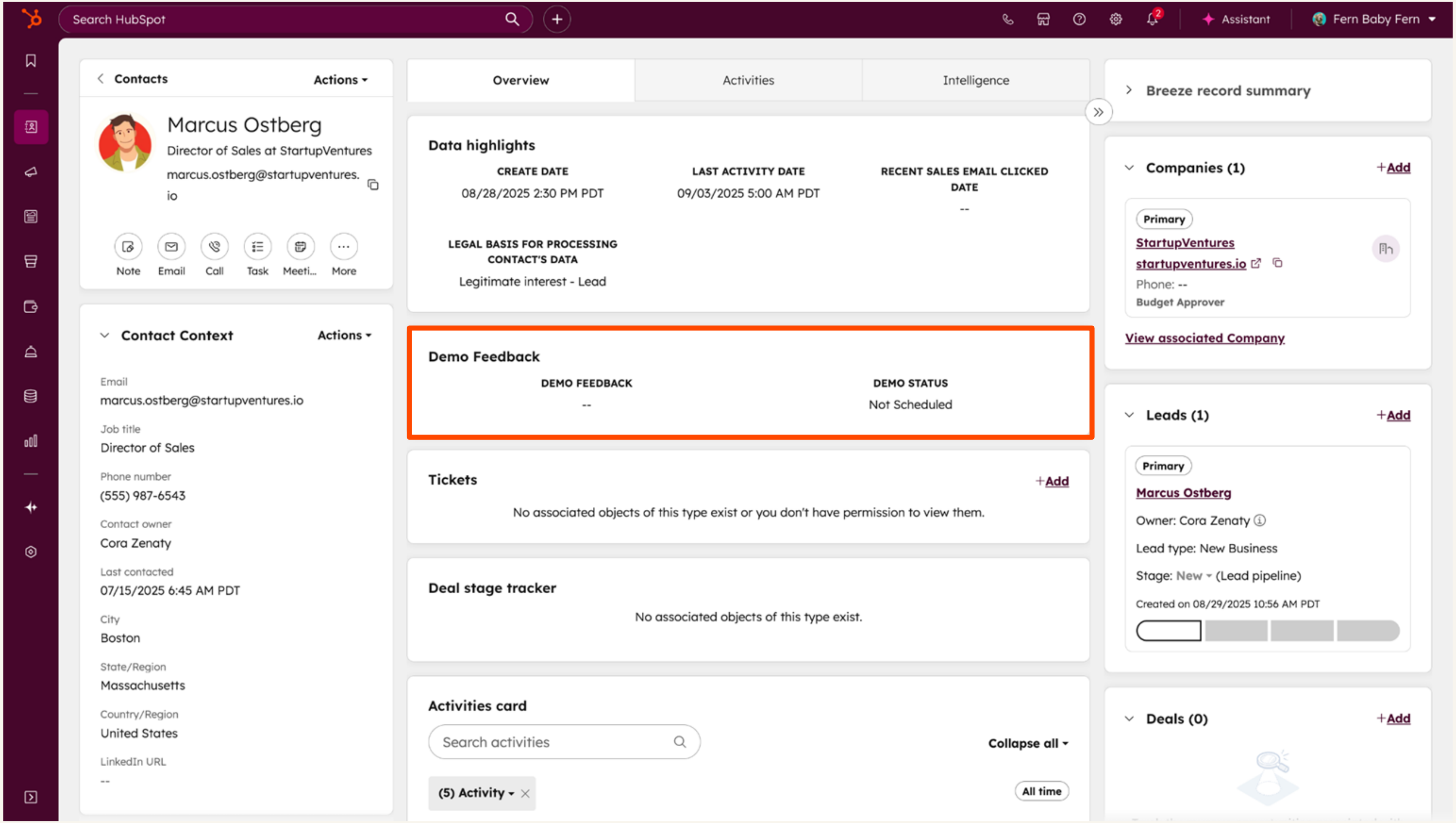
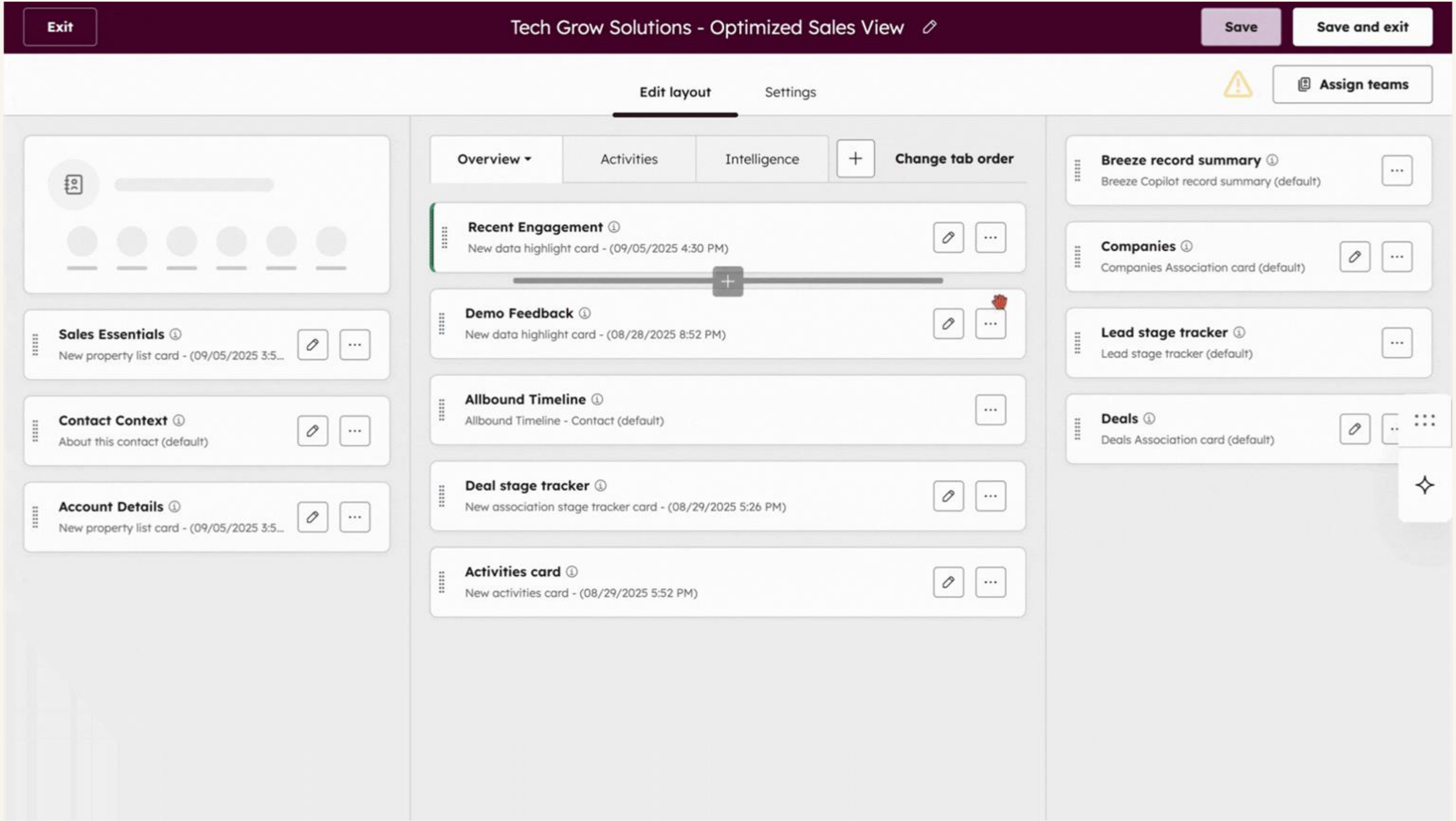
Deals
Deals Association card (default)

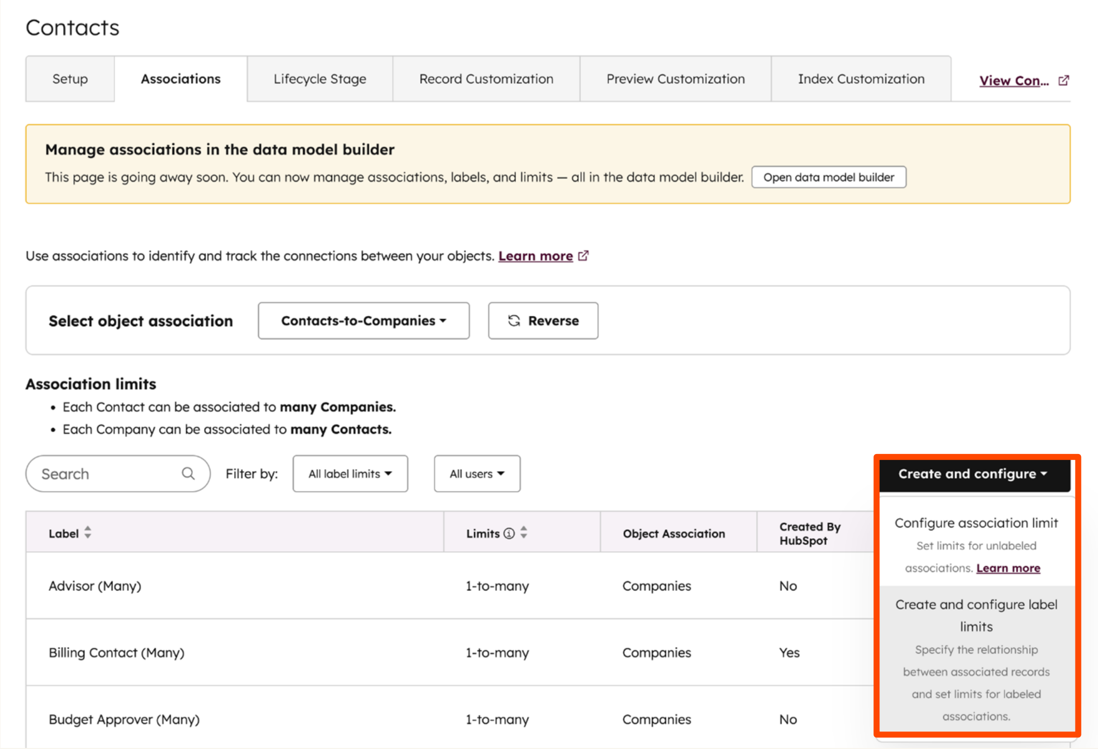

Search HubSpot
Assistant
Fern Baby Fern
Contacts
Actions
Marcus Ostberg
Director of Sales at StartupVentures
marcus.ostberg@startupventures.io
Note
Email
Call
Task
Meeti...
More
Contact Context
Actions
Email
marcus.ostberg@startupventures.io
Job title
Director of Sales
Phone number
(555) 987-6543
Contact 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

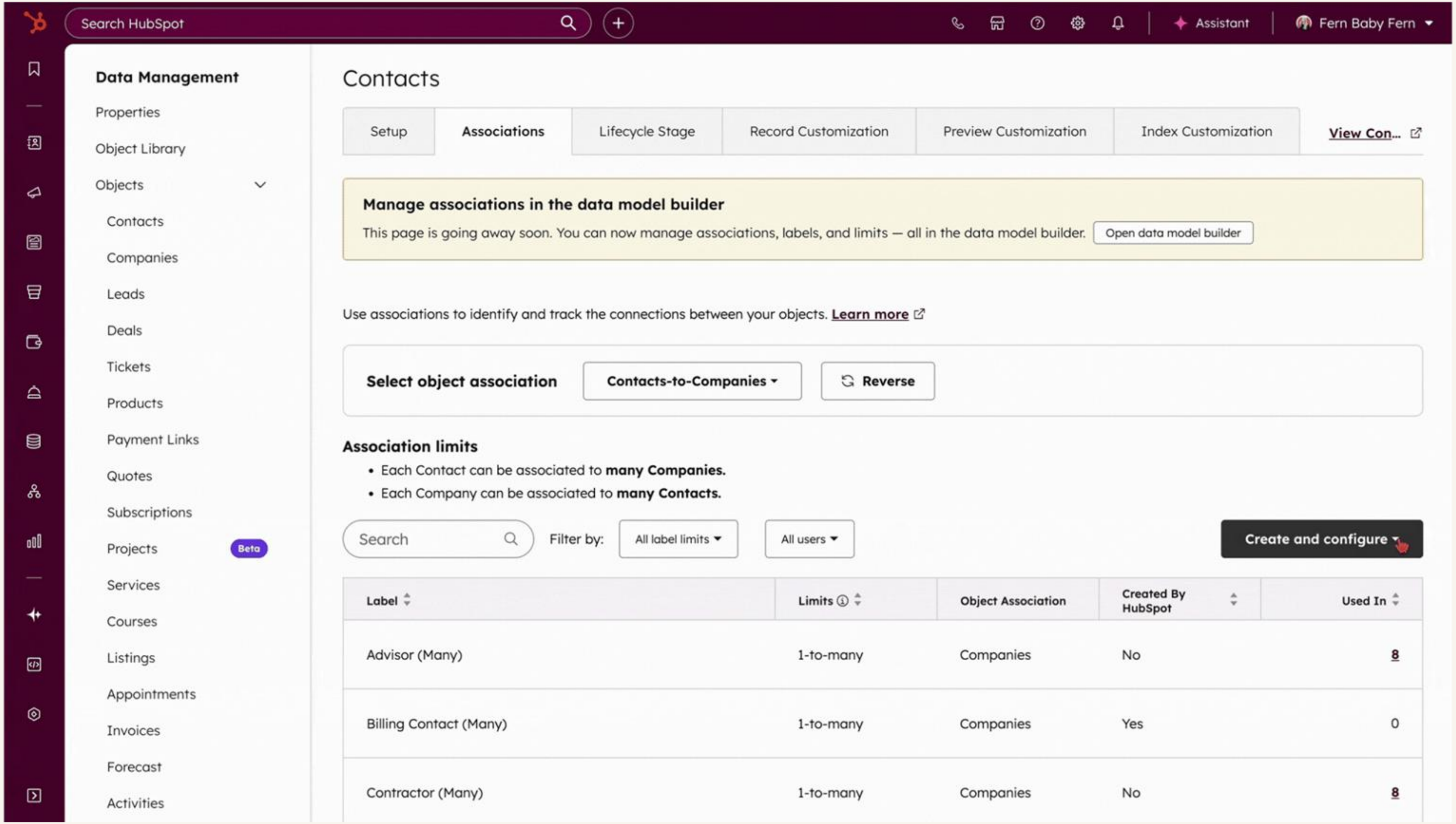

Exit
Tech Grow Solutions - Optimized Sales View
Save
Save and exit
Edit layout
Settings
Assign teams
Sales Essentials
New property list card - (09/05/2025 3:5...
Contact Context
About this contact (default)
Account Details
New property list card - (09/05/2025 3:5...
Overview
Activities
Intelligence
Change 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)

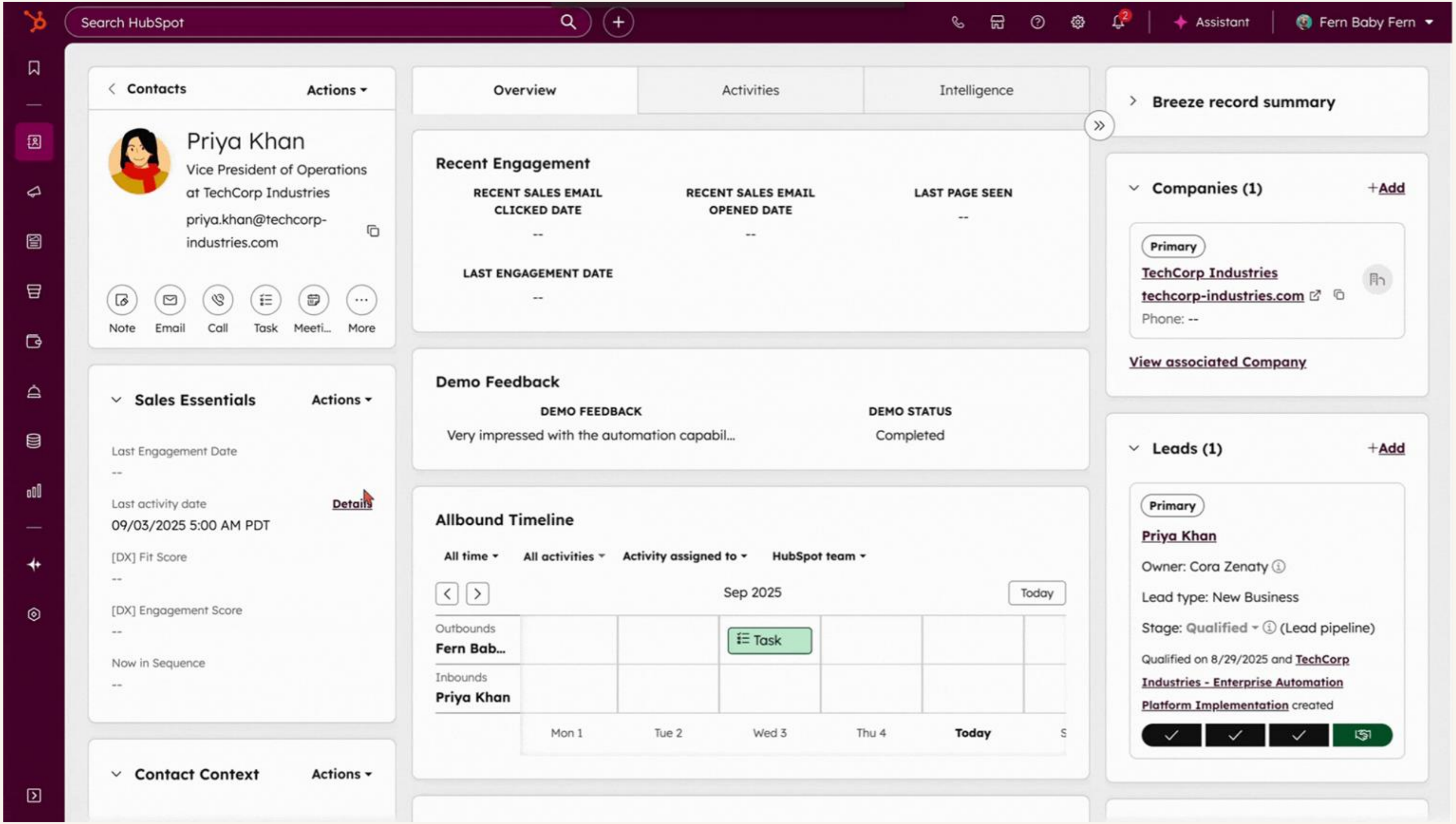
Association labels

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

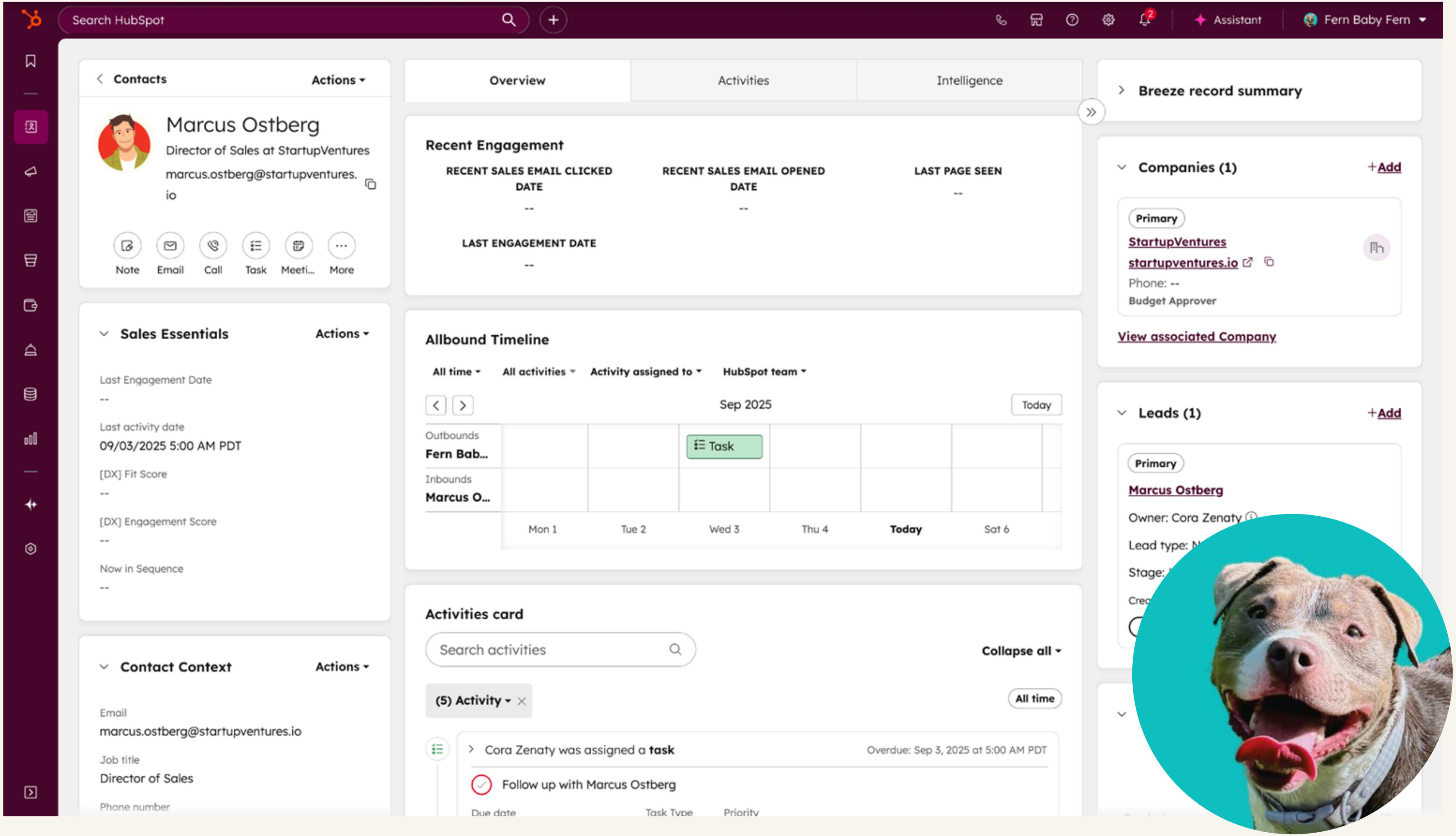
- Create labels to identify relationships among records




Search HubSpot
Assistant
Fern Baby Fern
Data Management
Properties
Object Library
Objects
Contacts
Companies
Leads
Deals
Tickets
Products
Payment Links
Quotes
Subscriptions
Projects
Beta
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
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
Sales Essentials
Actions
Last Engagement Date
--
Last activity date
Details
09/03/2025 5:00 AM PDT
[DX] Fit Score
--
[DX] Engagement Score
--
Now in Sequence
--
Contact Context
Actions
Overview
Activities
Intelligence
Recent Engagement
RECENT SALES EMAIL CLICKED DATE
--
RECENT SALES EMAIL OPENED DATE
--
LAST PAGE SEEN
--
LAST ENGAGEMENT DATE
--
Demo Feedback
DEMO FEEDBACK
Very impressed with the automation capabil...
DEMO STATUS
Completed
Allbound Timeline
All time
All activities
Activity assigned to
HubSpot team
Sep 2025
Today
Outbounds
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
Assistant
Fern Baby Fern
Contacts
Actions
Marcus Ostberg
Director of Sales at StartupVentures
marcus.ostberg@startupventures.io
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
Email
marcus.ostberg@startupventures.io
Job title
Director of Sales
Phone number
Overview
Activities
Intelligence
Recent Engagement
RECENT SALES EMAIL CLICKED DATE
--
RECENT SALES EMAIL OPENED DATE
--
LAST PAGE SEEN
--
LAST ENGAGEMENT DATE
--
Allbound Timeline
All time
All activities
Activity assigned to
HubSpot team
Sep 2025
Today
Outbounds
Fern Bab...
Task
Inbounds
Marcus O...
Mon 1
Tue 2
Wed 3
Thu 4
Today
Sat 6
Activities card
Search activities
Collapse all
(5) Activity
All time
Cora Zenaty was assigned a task
Overdue: Sep 3, 2025 at 5:00 AM PDT
Follow up with Marcus Ostberg
Due date
Task Type
Priority
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:
Stage:

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

- **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

...and more!

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

bitly

Please rate our session!

We hope you enjoyed today's session.

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

Thank You!

IN 25