



Introduction to Contacts

HubSpot Academy

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WHY USE CONTACTS

WHAT IS A CONTACT?

A contact is anybody your company, market, sells, partners, engages with or employs.

QUALITIES OF A GOOD CONTACT DATABASE

- See the whole picture of every contact
- Aligns Marketing and Sales
- Seamless integration with every tool you use

A network of glowing blue neurons with red nuclei, symbolizing a neural network or database. The neurons are interconnected by thin, translucent blue lines, creating a complex web of connections. The background is dark, with some light particles and a soft glow around the neurons.

Your contact database is
the **nerve center** for
all of your Inbound efforts.

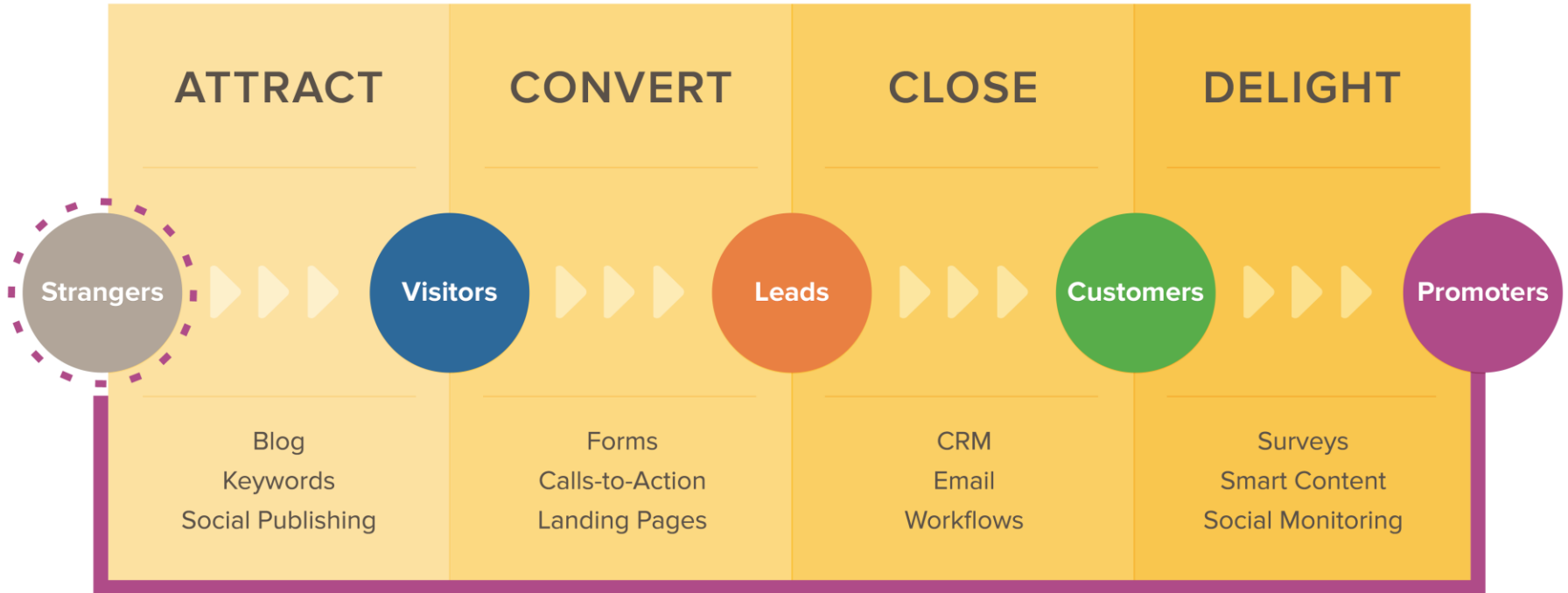


**WHAT DOES THAT MEAN
FOR MARKETERS?**

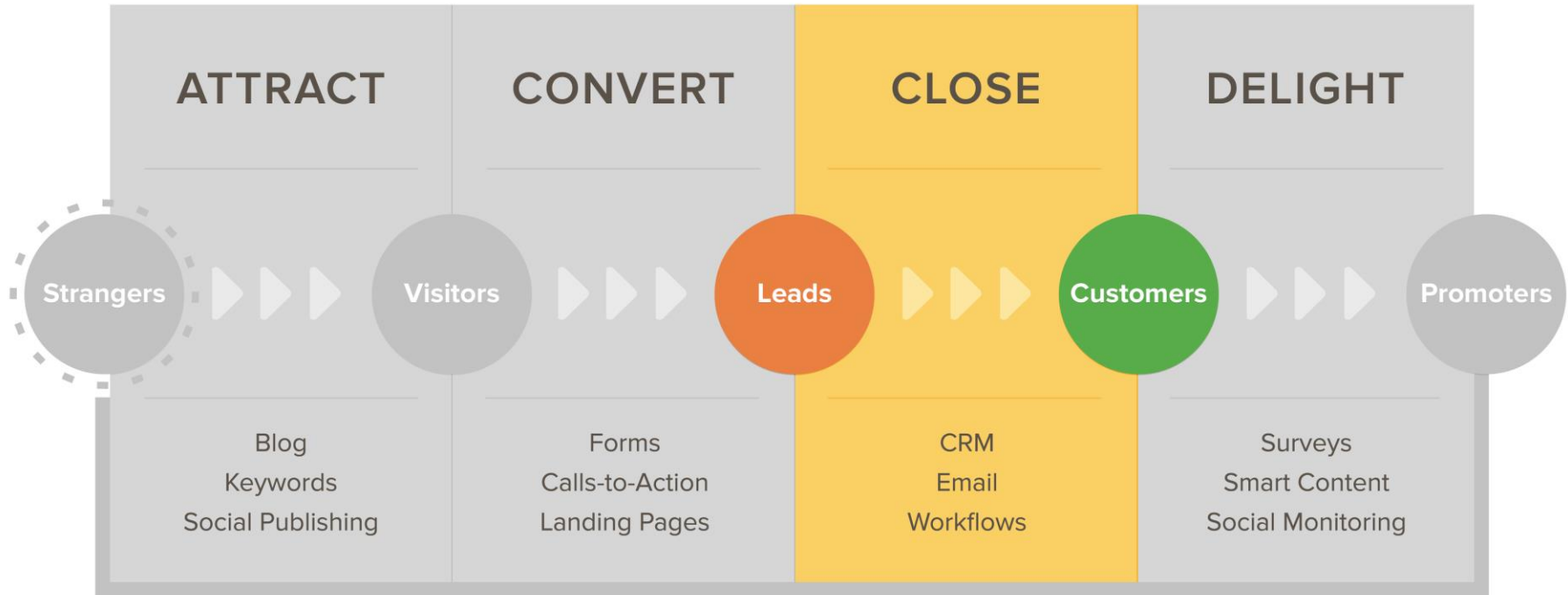


**WHAT DOES THAT MEAN
FOR SALES?**

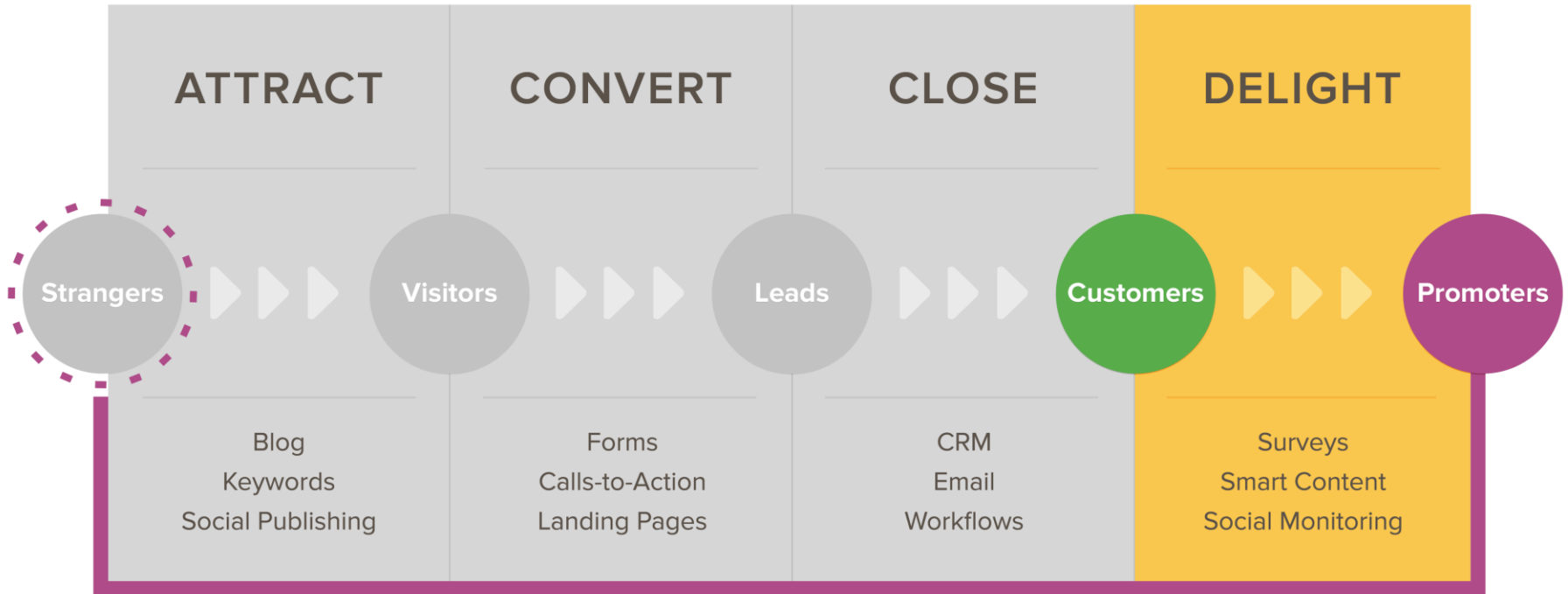
Inbound Methodology



Inbound Methodology



Inbound Methodology



The background is a dark blue-grey color with a repeating pattern of lightbulb icons. The icons are arranged in a grid and are lighter in color than the background.

2 HOW TO USE CONTACTS

BEST PRACTICES FOR MANAGING CONTACTS

- Make sure your contact database is always up-to-date.
- Build custom contact properties to create stronger contact profiles.
- Tell a story with the contact profile.
- Manage Lifecycle stage to ensure accurate closed-loop reporting.

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HOW DO YOU GET CONTACTS INTO HUBSPOT?

- Contact submits a form on your website
- Contacts are imported from a spreadsheet
- Contacts are added manually
- Contacts are added via integrations

KEEP YOUR CONTACT DATABASE UP-TO-DATE

- Upload all current business contacts
- Track contacts as they move through the buyers journey.
- Set up and maintain integrations with other software.
- Keep your data clean

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A CONTACT PROPERTY
STORES INFORMATION
ABOUT AN **INDIVIDUAL**
CONTACT.



A COMPANY PROPERTY
STORES INFORMATION
ABOUT A **GROUP OF**
CONTACTS.



STORE INFORMATION

- Website activity
- Email engagement
- Social Media activity
- Form submissions
- Conversion information
- Integrations



SURFACE INFORMATION

- Personalize email
- Build Lists
- Trigger marketing automation
- Define Personas
- Smart content
- Lead Intelligence

No two businesses are **alike**.

Build custom contact properties to make HubSpot your own.

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Reading the **contact timeline**.

October 2014

- 1 Webinar event
- 3 Form submissions
- 3 Emails
- 6 Website visits
- 4 List memberships

Added to [10.30.14 Partner Strat Lab - plan build.csv](#)
Oct 30 2014 at 2:40 PM

[Alert Us of Your Meetup to Go on the Calendar](#) and 4 other pages
Show Pages viewed - Oct 29 2014 at 11:26 AM
Landing page
Page type

HUG: Alert us of your meetup
Hide Submission details - Oct 29 2014 at 11:26 AM
6
Updated properties

[Alert Us of Your Meetup to Go on the Calendar](#)

Date of Event Tuesday, December 9, 2014

Last Name

Topic or Tools Planned for Discussion

Guest Speaker is Rachel Sprung, HubSpot Product Marketing Associate

RSVP Link for Customers (Please use Eventbrite<...

<http://bocaraton.hubspotusergroups.com//december-2014>

Location (Include Address)

Short two-sentence pitch to why someone should attend your meetup.

Bring your business cards, introduce yourself, and network with other inbound marketers in South Florida! Both HubSpot customers and those curious about HubSpot are welcome!

[Alert Us of Your Meetup to Go on the Calendar](#) and 2 other pages
Show Pages viewed - Oct 28 2014 at 4:27 PM
Landing page
Page type


[this week's HubSpot Partner training webinars](#)
Oct 28 2014 at 12:03 PM
Opened

Attended [The 2014-2015 #HUBPARTNER Broadcast Monthly Webinar Series](#) for an hour
Show Webinar details - Oct 23 2014 at 10:47 AM

- Lifecycle changes
- Salesforce syncs
- Website visits
- Emails
- List membership
- Form submission
- Automation events
- Twitter events
- Events
- Webinar Events
- Survey Events

Reading the **contact profile**.

Isaac Moche + Add/Remove from lists ✉ Opt out of email ▼ More actions



First touch
2 Years Ago
[Direct Traffic](#)

Last touch
5 Days Ago
[Opened Email](#)

Lifecycle stage
Lead
Since December 13 2013

Starred Properties

[Return to all contacts](#)

Contact details

Overview


- [Properties](#)
- [Company](#)
- [Workflows](#)
- [Property History](#)
- [List Memberships](#)

Contact research

- [Search in Google](#)

Public contact URL

[Contacts settings](#)

Company Name:	<input type="text"/>	=	★	i
Create Date:	<input type="text" value="Dec 13 2013"/>	=	★	i
Email:	<input type="text" value="imoche@hubspot.com"/> 	=	★	i
First Name:	<input type="text" value="Isaac"/>	=	★	i
Last Name:	<input type="text" value="Moche"/>	=	★	i
Mobile Phone Number:	<input type="text"/>	=	★	i
Phone Number:	<input type="text"/>	=	★	i
Twitter Username:	<input type="text"/>	=	★	i
Website URL:	<input type="text"/>	=	★	i
☰ Create Date:	<input type="text"/>	=	★	
☰ Phone Number:	<input type="text"/>	=	★	

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WHY USE LIFECYCLE STAGES?

Lifecycle stages help you organize your contacts based on where they are in your sales cycle.

Using lifecycle stages properly ensures that your communications are tailored to the unique needs and concerns of all of **your contacts.**



EXAMPLE: CLOTHING RETAILER

What if you could...

- ...see what kind of clothing is in your customer's closet?
- ...see what pieces your customer had tried on before?
- ...or see if your customer had discussed your clothing with a friend?

Why use **closed-loop marketing**?

A closed loop gives marketing and sales insight into which leads are most likely to become customers.



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THANK YOU.

HubSpot
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