Video 1: Why is a CRM important to your inbound business?

Hello there, I'm Courtney with HubSpot Academy.

Take a minute and think about where you keep track of everything for your business or even for your personal tasks. Do you have one central place? Do you wish you did?

If so, you've come to the right place. We're going to talk about a CRM and its role in growing any business.

Let's start by discussing what a CRM actually is. A CRM, or Customer Relationship Management, is a system for managing relationships. This can be relationships with customers, users, leads, and even prospects. Any relationship that your company is engaging with and tracking can be captured and stored in your CRM

This means that your CRM plays a very important role in your inbound business. As your business grows, your CRM the central place where all your information lives.

Think about the quick answers to important questions daily. Slowing down your team by not serving up this information easily can harm your business in the short and long term.

This is the value of your CRM. It becomes the one source of truth for everyone in your business and connects each piece of your business—from your CEO, down to your individual content creators, across to your sales reps and their managers, and to your customer success. If you're a startup and only have a few people playing all these roles, then you need one place to communicate and track so that as you grow, you don't lose the information that could be stuck in someone's head, in their inbox, or across multiple files that get lost overtime.

On top of this, your CRM is at the center of your company's flywheel. You might be wondering, "What exactly is a flywheel, and how does it relate to my company?" A flywheel is a machine that stores rotational energy. When you add energy to a flywheel, it starts to spin. If you add more energy to it, it spins faster. In your flywheel, you have marketing, sales, and service. And in the middle of all this, you have your customers. And where are your customers stored? You got it—your CRM.

As your company grows and your flywheel spins faster, your CRM will be the place where you continue to store your data to help arm everyone at your company with the information they need to continue to move your flywheel.

So while your CRM helps keep your flywheel spinning, it also supports your growth and helps you organize your business. Use it to organize the areas that help you do what you need to do for your business while being human and helpful.

Using your CRM to store your contacts, companies, deals, tickets coming in to your customer success team, your business's human and helpful qualities will shine in every interaction across all channels you use to communicate. And lastly, your CRM equipes your team with the context they need to provide personalized and relevant outreach every time.

With your CRM as the one location for all the details of your leads and customers, it's easy for everyone in your organization to gain insight into the state of your business and the status of every relationship.

Video 2: How is the HubSpot CRM organized?

HubSpot's CRM is organized to help you grow your business. o do that, there are a few structures in place to help you.

We're going to explore how your HubSpot CRM is organized by looking at the properties in the CRM and the records those properties are associated with, how information is de-duplicated, and the pipelines used to organize actions that occur.

Let's first take a look at your properties and records in your CRM.

There are two key components in the CRM: records and properties.

Records are the individuals contacts, companies, deals, and tickets. These records are what you add information to.

Properties store information about a contact, company, deal, or ticket. Your HubSpot account includes a number of contact, company, deal, and ticket properties by default. However, you may need additional properties to store information for your business's marketing, sales, and service processes. To store this information, you can create custom properties.

Before importing your data into HubSpot, do an audit of the properties that you use or want to use moving forward, and create the custom properties in HubSpot.

On all Hubspot records, you'll be able to log activities—such as notes, calls, and emails—as well as create associated tasks or schedule meetings in addition to the properties that are logged on the record.

Next is the de-duplication of the records that you have in HubSpot.

Think about the current stat of your company or organization or where you want your company or organization to be in 2, 3, or even 10 years. You could have hundreds, even thousands, of people adding data to your CRM. And with all these people adding information there's an increased risk that the same information will be added multiple times.

And why would you want the same record twice in your database?

You wouldn't. So HubSpot de-duplicates your records in a few different ways to keep your database clean.

Both contacts and companies can be de-duplicated based on specific property values. Contacts can also be de-duplicated by a usertoken set with a cookie in the contact's web browser or by the contact's email address. Contacts, companies, deals, and tickets can all de-duplicated by a unique record ID.

This de-duplication helps keep your database organized and prevents you from sitting and going through your data consistently to manually de-duplicate.

This process will continue to help you over time and make sure the data you're seeing is accurate.

And with your records and properties set up, you'll start seeing how each piece is associated with each other. Your associations illustrate how everything comes together.

Think about it like this: Each of the properties that you have are located in each of the records you have, whether those records are contact, company, deal, or ticket records.

The properties are filling in the records to give you personalized information on each person, company, deal, or ticket in your CRM.

And the last piece of how your CRM is organized is your pipelines. Your pipelines are where you can see how different deals are moving through your sales process and report on that progress.

This is where your deal records (which can include contacts, companies, and ticket associations) will be most present. And these records can live in the different pipelines you build based off your business. With your pipelines, you can customize the deal stages you associate with them. What happens in your sales process will be different than what happens in another company's. Make this personalized for what you and your business need to see.

So that's how your CRM is organized. Records, properties, and associations keep your data connected and contextual. Pipelines show how your deals are moving and where your contacts and companies fit into those deals. Together, these pieces serve as the foundation of all the information you need to do marketing, sales, and service for your business.

Video 3: Where everything located in the HubSpot CRM?

Your CRM is the foundation of everything happening in your HubSpot account. From any area of your HubSpot account, you can navigate to some of the key organizational elements of your database.

When logging in to your HubSpot account, you'll be brought to your dashboards page. This is where you can see your dashboards reports and where all the data in your CRM is being surfaced for you to explore.

Navigate to the upper right-hand corner and select the settings gear icon. This will take you to your "Account Defaults" page, where you can enter basic information for your HubSpot CRM account" From here, you can navigate to your properties, deals, and pipelines.

From the top navigation menu, select "Contacts" and then select "Contacts" from the dropdown menu.

This is where all of your contact records live.

On the left, click "Add filter" to add criteria to show different views of your contact list.

Now navigate to your other key records.

From the top navigation menu, select "Contacts" and then select "Companies" from the dropdown menu. This is where your company records live.

From this screen, you can select a company and view other records such as contacts and deals that are associated with that company.

Click on the company name to see the company record. On the left-hand side, you'll see the associated records and other properties that have been filled in for this specific company.

Lastly, navigate to deals by going back to the top navigation menu, selecting "Sales," and then selecting "Deals." This is where your different pipelines will appear and the associated deal stages you can set.

If you have any open deals in your pipeline, you'll be able to select the deal record from this screen by clicking on the name of the deal**.** This will take you to the deal record where you can see the associated records such as company and contact records.

Here's a HubSpot tip: You can attach files to deal records such as proposal agreements or images. This can be helpful to organize any outside information for your deals.

Video 4: How to create custom properties in HubSpot?

Navigate to the upper right-hand corner and select the settings gear icon.

On the "Settings" page, navigate to the left sidebar menu and select "Properties."

Here you can see the different types of properties you can create. For example, create a custom contact property by navigating to the upper-right and selecting "Create a property."

In the right sidebar window, enter a name for your property in the “Label” field, an internal name in the “Internal name” field, and a description in the “Description” field.

From the “Group” dropdown menu, select a group to associate the property with. For example, is the property a contact property or an email marketing property?

Then use the “Field type” dropdown menu to select the property type. This is the most important step. There are a few different types of properties to choose from:

Single checkbox, where you only have two options: on or off.

Multiple checkboxes, which contain several specific options that are usually related.

Date picker, which is used to allow visitors to input a specific date in a standard format that can be segmented on.

As well as a few other options, including:

Dropdown select, which contains several specific options, and the visitor is limited to selecting only one of the options.

Single-line text or Multi-line text. Single-line text properties can contain a word, a phrase, or a sentence. Or a multi-line text properties can contain a paragraph or list of items.

After selecting your property type, check the box beside “Show in forms” if you’d like the option of showing your new property in your HubSpot forms. When you’re done, click “Create.”