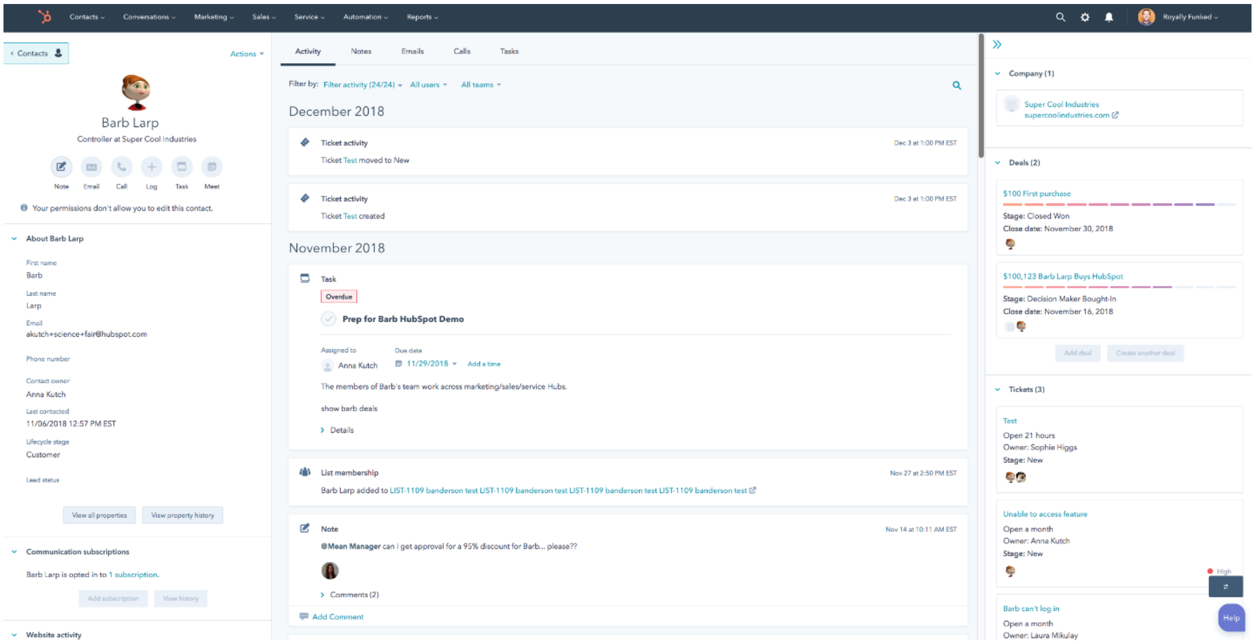
A New CRM Record is Coming from HubSpot (you can opt in)

Jan 7



Your HubSpot records — contacts, companies, deals, and tickets — are the backbone of your HubSpot account. They tie every other tool together, constantly absorbing new information about your prospects and helping you put that information to use to provide better experiences for your customers.

The power of records in HubSpot is the amount of context they provide. In a single profile, you can see a slew of things: important characteristics (properties), key actions and events (pageviews, email opens, sales calls, and more), associated records, workflow enrollments, list memberships, quotes, and more. Plus, you can actually interact with your customers from your records. Send an email, make a call, or book a meeting from any record in HubSpot.

While there's power in having so much context in one place, there's an inherent design challenge as well: in your HubSpot records, you need to see a ton of information. But, at the same time, it needs to be accessible and digestible (not overwhelming), and it needs to be customizable for every use case on your team. With those goals in mind, records in HubSpot have gone through several iterations over the years.

Today, we're excited to announce that the next evolution of the HubSpot record. It's more streamlined, making it easier to access all the context you need to create better customer interactions, while maintaining its clarity and cleanliness. Plus, it's got a ton of new functionality to boot.

We'll walk you through the new record in detail below, but before we do, a few quick notes:

- You can opt into the new design using the button in the bottom-left of any record.
- You can opt out at any time and continue to use the current design.
- The opt-in is on a per-user basis in your account. In other words, opting in or out won't impact the other users on your team.

With the logistics out of the way, here's the scoop on the new record.

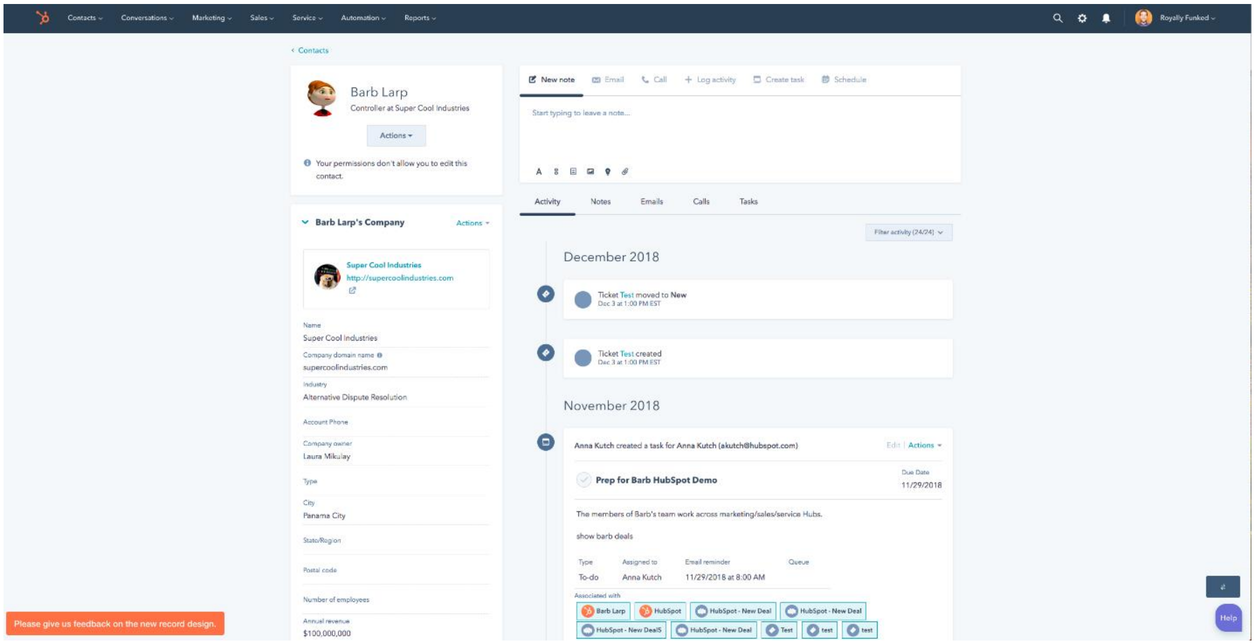
What's different?

From two columns to three

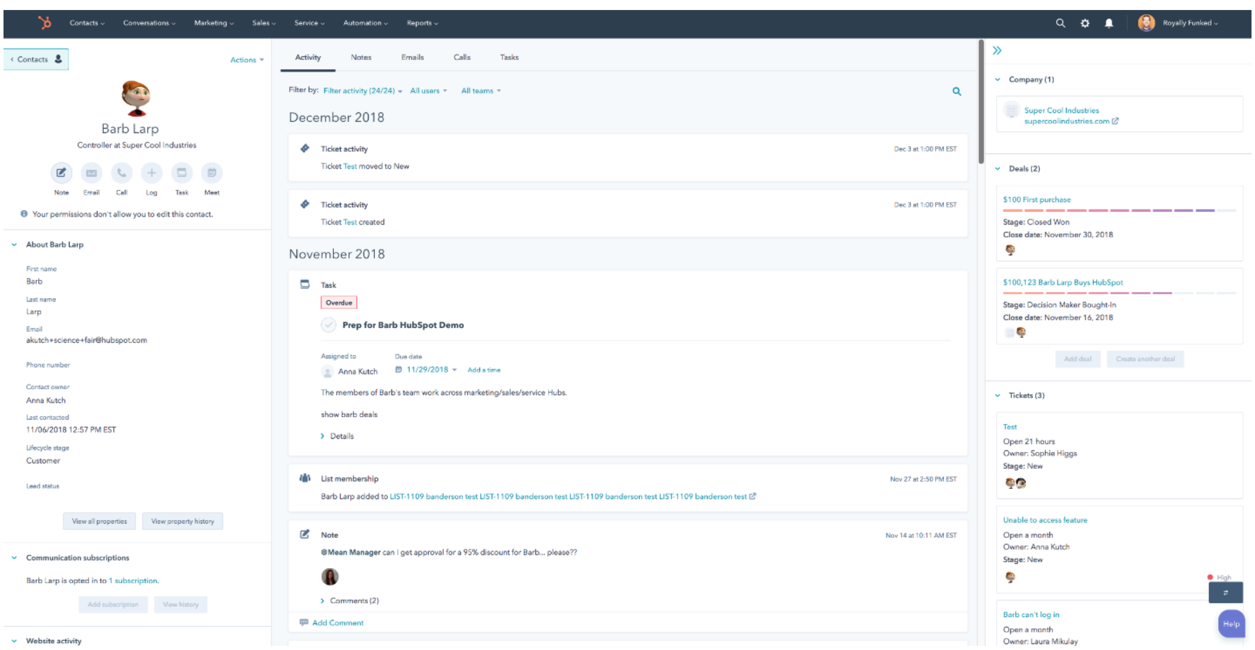
Over the years, you've given us the same feedback again and again about your records: scrolling is the enemy of productivity. The more relevant information that lives above the fold, the better. With that in mind, your records have gone from a static two column layout to a responsive three column layout. The three columns allow you to instantly see way more context than before; no scrolling required. The new columns break down like this:

- On the left, you'll find important information about the specific record type. For example, for Contacts, you'll see the about card, communication subscription card, website activity, and predictive lead score card (if you're using Enterprise).
- In the middle, you'll see the timeline of recent activities.
- On the right, you'll see any associated records of other types (example: deals related to a certain contact).

Before:



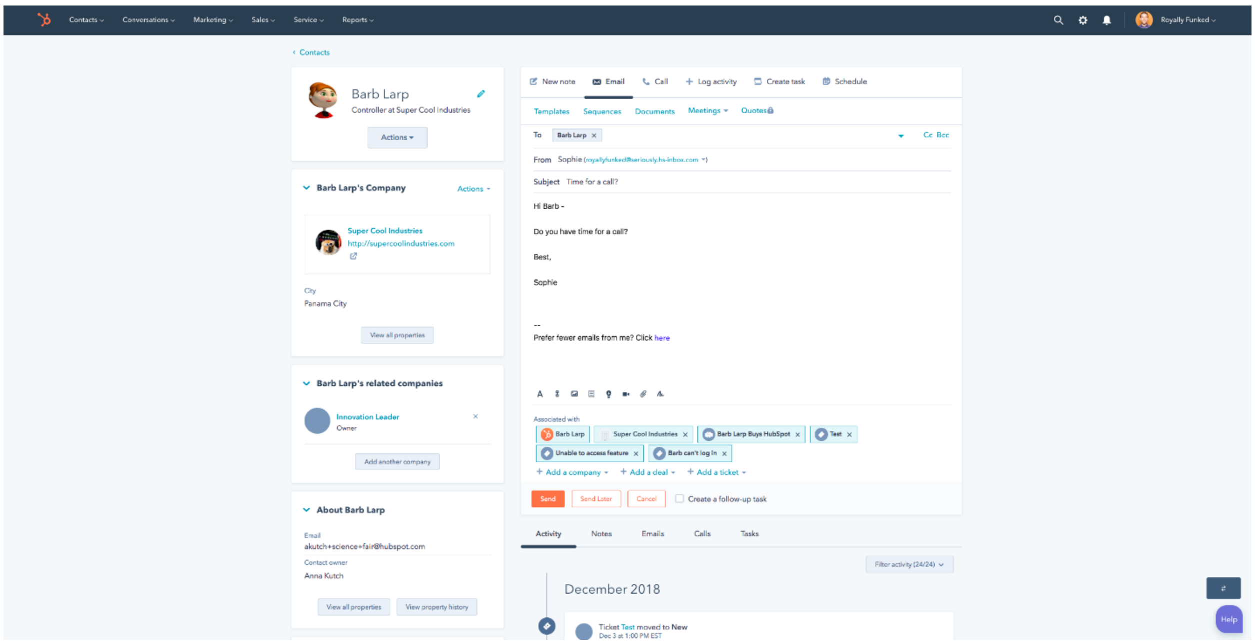
After:



Pop up communicator

The communicator in the “old” record — where you could make calls, send emails, and all the rest — was stuck to the top of the page. If you wanted to find additional context about the record, you had to scroll all the way down, then all the way back up. With the new design, simply click the interaction buttons in the left-hand sidebar, and a communicator pane pops up at the bottom of the screen. Just like the apps that you're used to using, like Gmail and Office365. With the new communicator design, you can view information on the record while interacting with your prospects and customers. That means less scrolling for you, and better experiences for your buyers. Win win.

Before:



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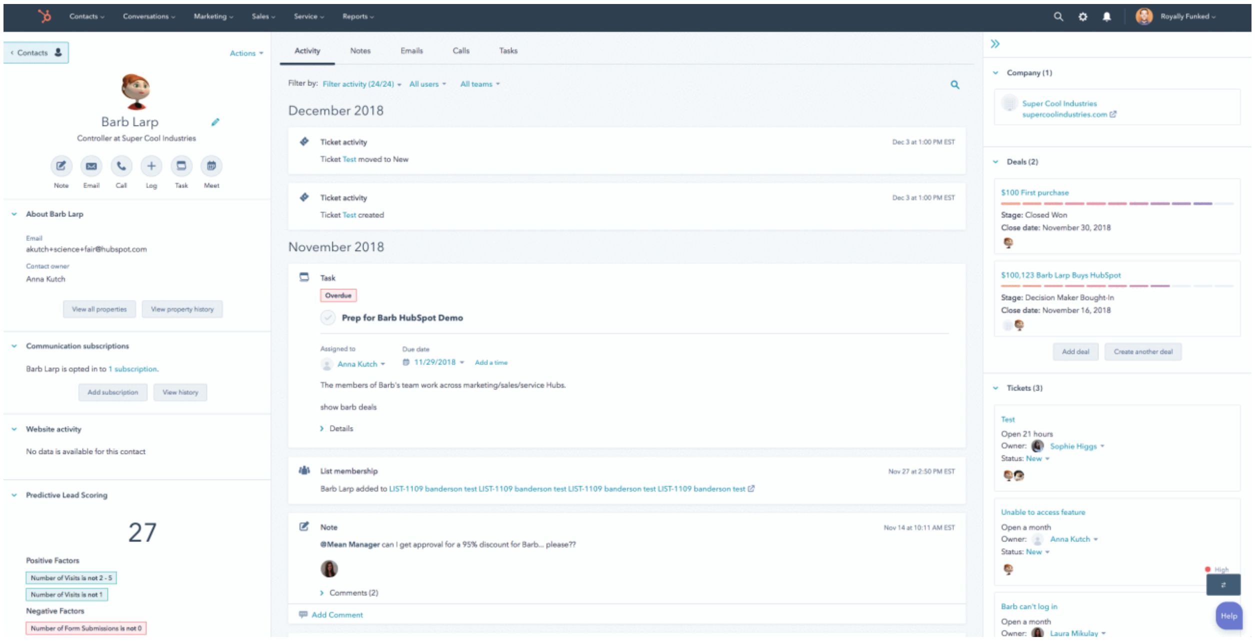
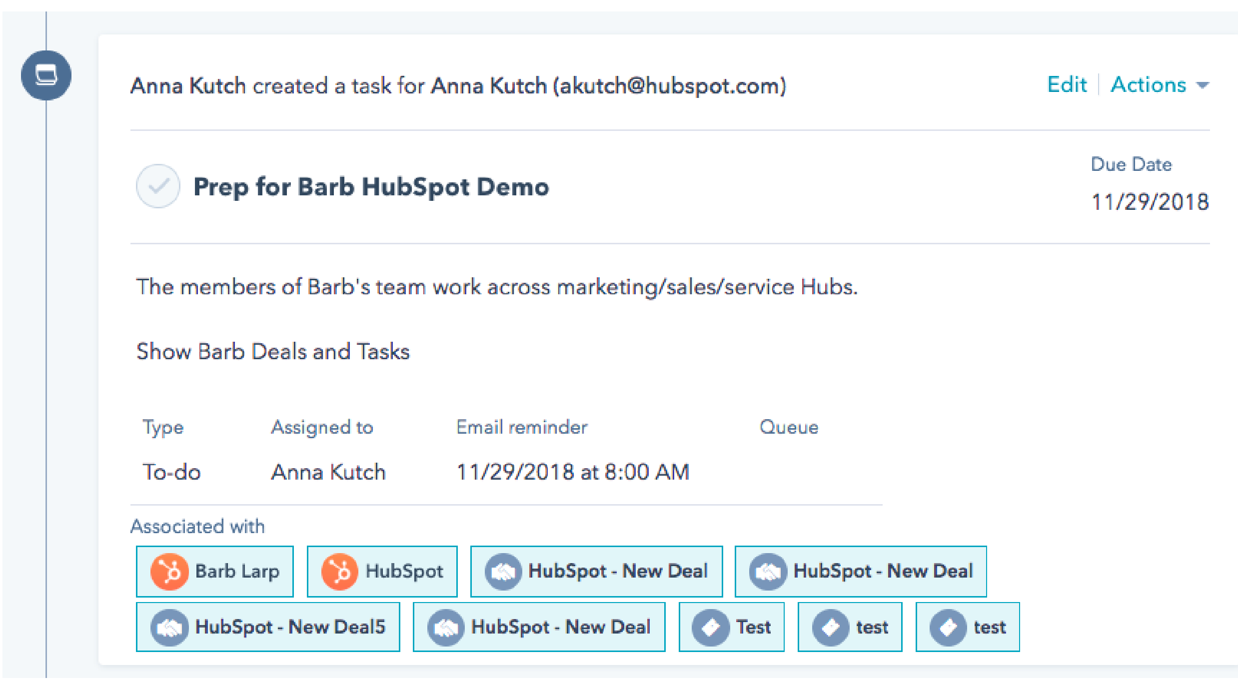


Timeline card redesign

The timeline cards have a new look. We took a hard look at the information being presented in each of the timeline cards and streamlined them. We put information that doesn’t need to be accessed frequently behind a hover state and collapsed cards when appropriate. All in all, the timeline should now be easier to parse and scan. One example: task details and associations are consolidated.

Before:



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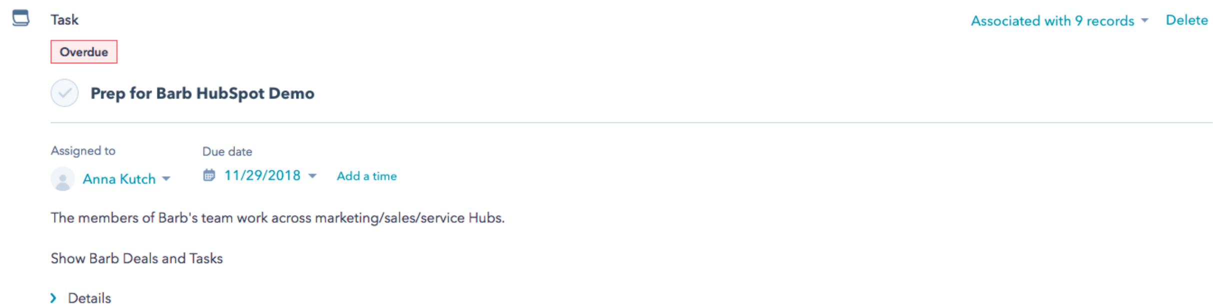
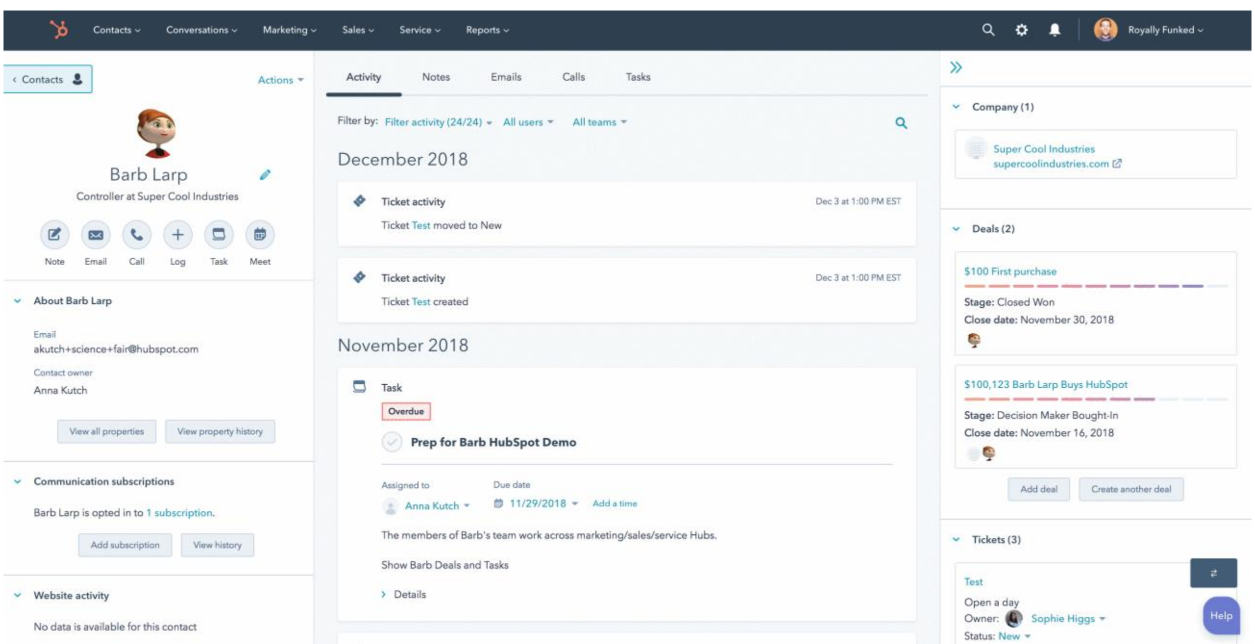


What’s new?

The new record design doesn’t just improve existing functionality; it adds a ton of brand new features as well.

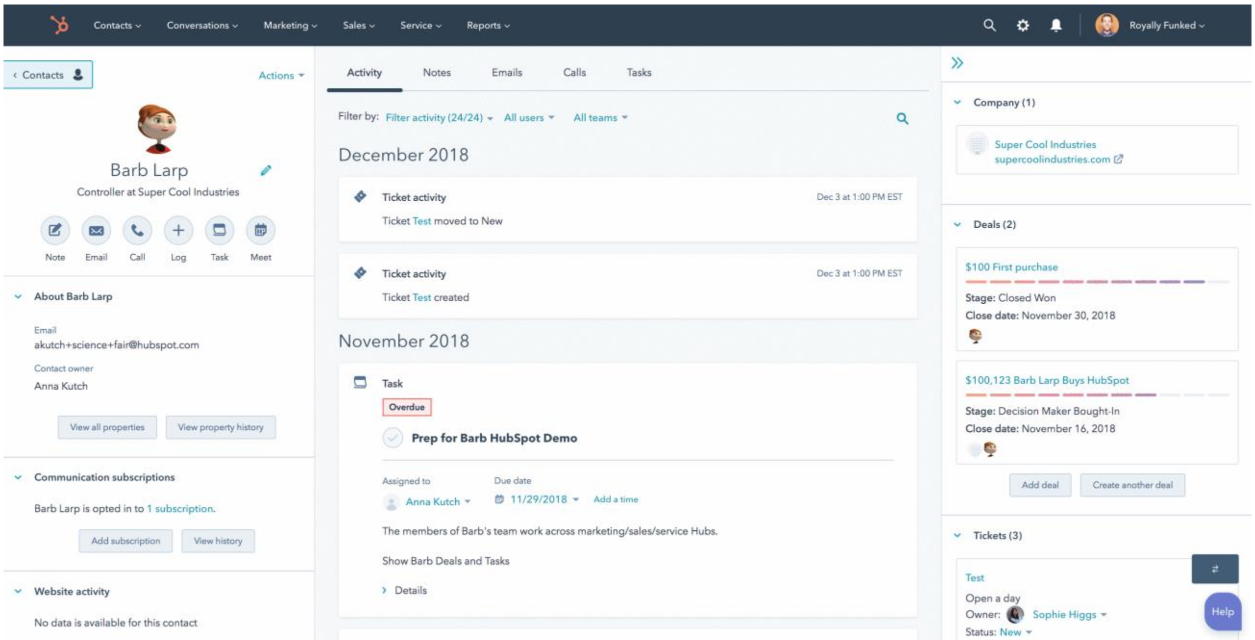
Associated record preview

A single record doesn’t always hold all the context you need in order to have an informed interaction with a customer. If you’re a sales rep working a deal, you might need to dig into the details of a single contact, or the time zone of the associated company. If you’re a support rep, you might need to check which products are associated to your customer’s most recent deal. With the new record design, you can quickly see information about an associated record without leaving the record you’re on, via a brand new preview feature. No more clicking back and forth between records.



Collapsable right sidebar

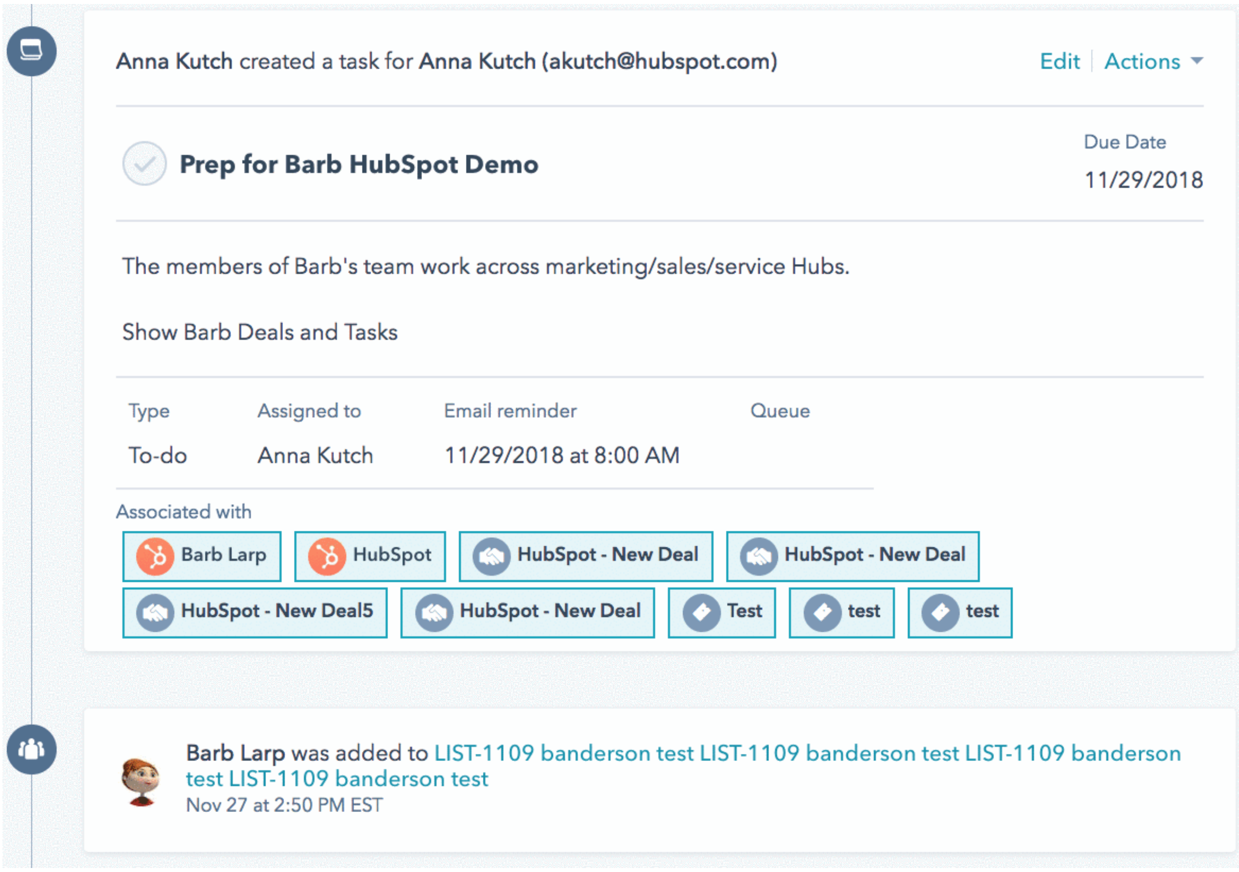
Using a smaller screen? Want to focus specifically on the activity in the timeline with a bit more breathing room? You can now collapse and expand the right sidebar and pull it up when you need it.



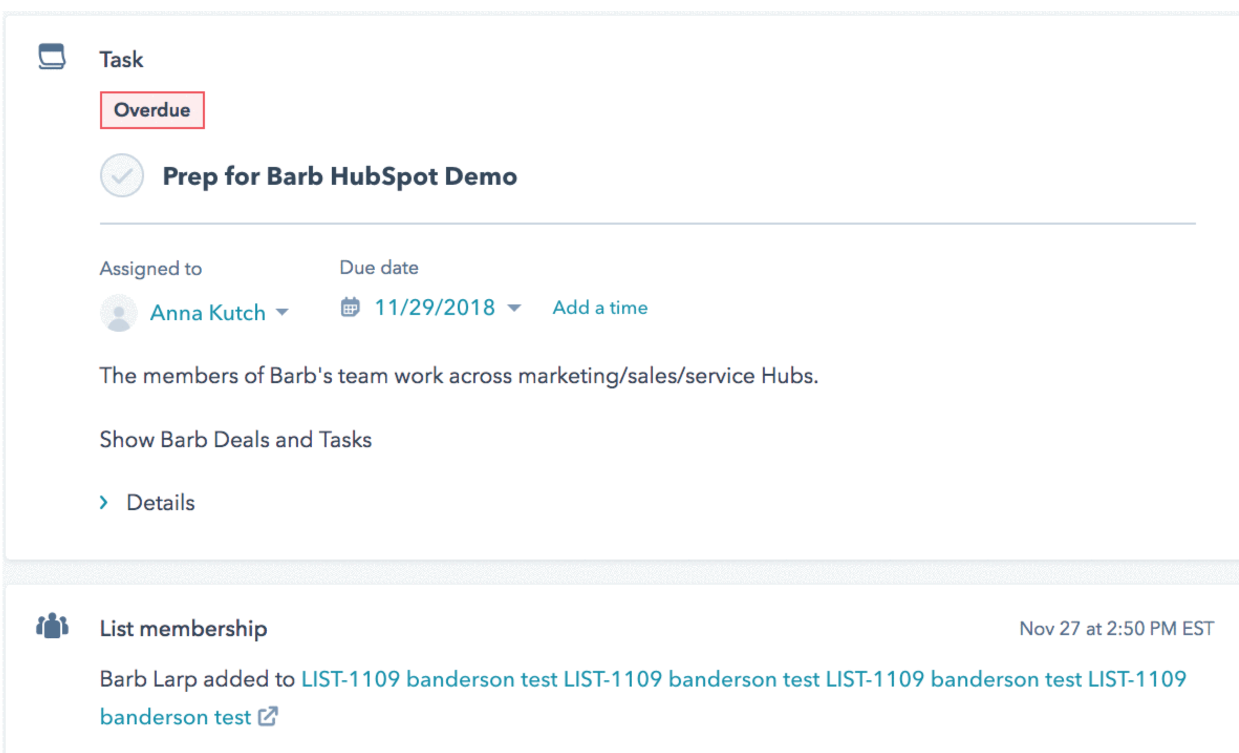
Inline Timeline Editing and Timeline Filtering

In addition to the streamlined look, we’ve also introduced inline editing for activities in the timeline so you can update their notes, or change the date of a task in far less clicks.

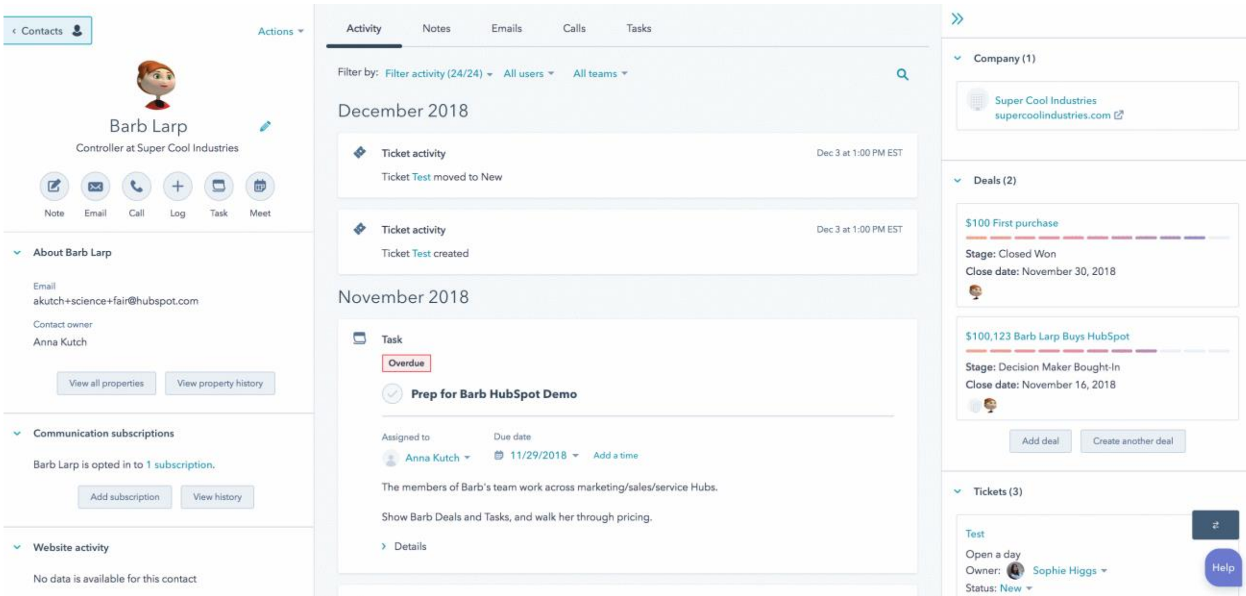
Before:


Anna Kutch created a task for Anna Kutch (akutch@hubspot.com)
Edit
Actions
Prep for Barb HubSpot Demo
Due Date
11/29/2018
The members of Barb's team work across marketing/sales/service Hubs.
Show Barb Deals and Tasks
Type
To-do
Assigned to
Anna Kutch
Email reminder
11/29/2018 at 8:00 AM
Queue
Associated with
Barb Larp
HubSpot
HubSpot - New Deal
HubSpot - New Deal
HubSpot - New Deal5
HubSpot - New Deal
Test
test
test
Barb Larp was added to LIST-1109 banderson test LIST-1109 banderson test LIST-1109 banderson test LIST-1109 banderson test
Nov 27 at 2:50 PM EST

After:

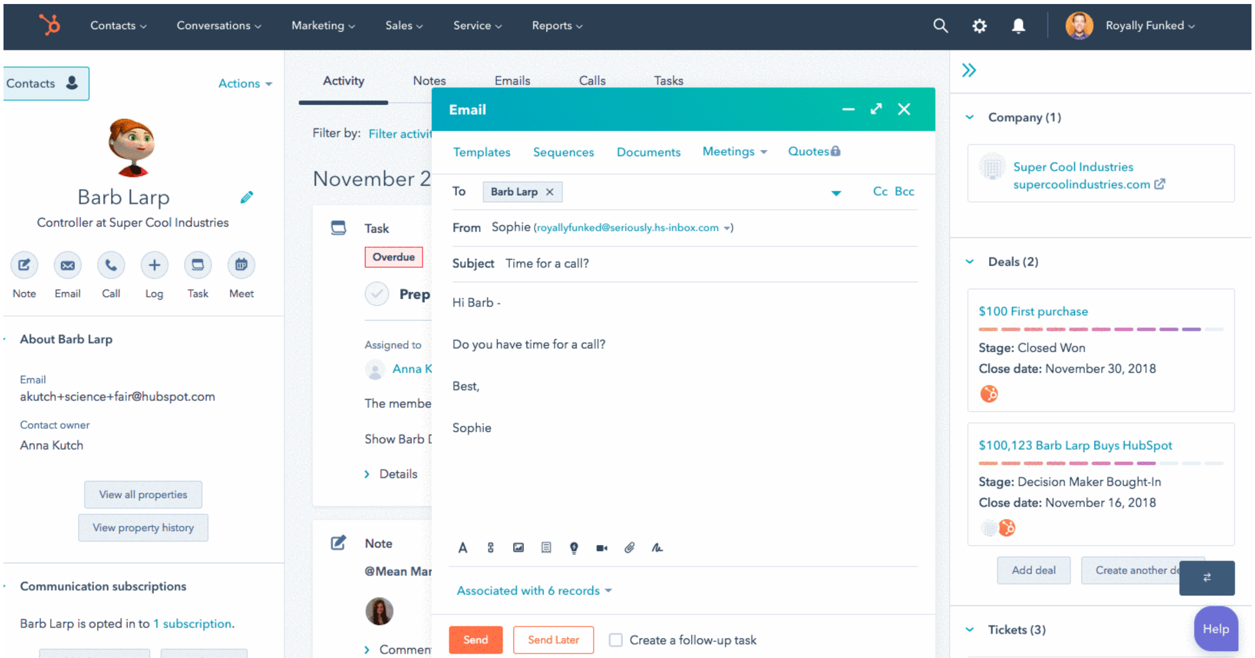

Task
Overdue
Prep for Barb HubSpot Demo
Assigned to
Anna Kutch
Due date
11/29/2018
Add a time
The members of Barb's team work across marketing/sales/service Hubs.
Show Barb Deals and Tasks
Details
List membership
Nov 27 at 2:50 PM EST
Barb Larp added to LIST-1109 banderson test LIST-1109 banderson test LIST-1109 banderson test LIST-1109 banderson test

Also, you can now filter the timeline by owner and team to filter the CRM activities in the timeline to just the things you want to see - for example, just see the activities that your sales team have created vs the support team etc. We've also introduced timeline search so you can quickly find specific activities.



Pop up interactions

As mentioned above, we're working to make the activity interaction pane act more similarly to the apps that you know and love already. With this change, we've also included minimize and full screen functionality.



As a client and subscriber to the EDO Accelerator, we're happy to set up a no-charge online training session to walk you through this update. We will send out a few times for presentations once this is released.

As a HubSpot partner, we anticipate getting the update this week so we'll have some experience with this already.

Tom Wengler

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