

Understanding Imports & Associations

Weekly Workshops



Agenda

1. What is a CRM?
2. Managing Properties
3. Managing Records
4. Questions





Icebreaker

What's your go-to karaoke song?



What is a CRM?



What is a CRM?

A database that enables businesses to manage relationships with contacts and customers by centralizing information.



What are objects?

Objects represent a specific type of thing your business has a process for tracking.





Discussion

What objects should a business use?

What objects do you use?



HubSpot Objects

<i>Object</i>	<i>Represents</i>	<i>How It's Used</i>
Contacts	People	Can be used for tasks like sending marketing emails
Companies	Organizations	Automatically enriched with public information
Deals	Potential sales	Basis of your revenue attribution reports and sales forecasts
Tickets	Customer support requests	Can be automatically created by incoming email and chats



What is a record?

A single instance of an object, where you can store information and track interactions.



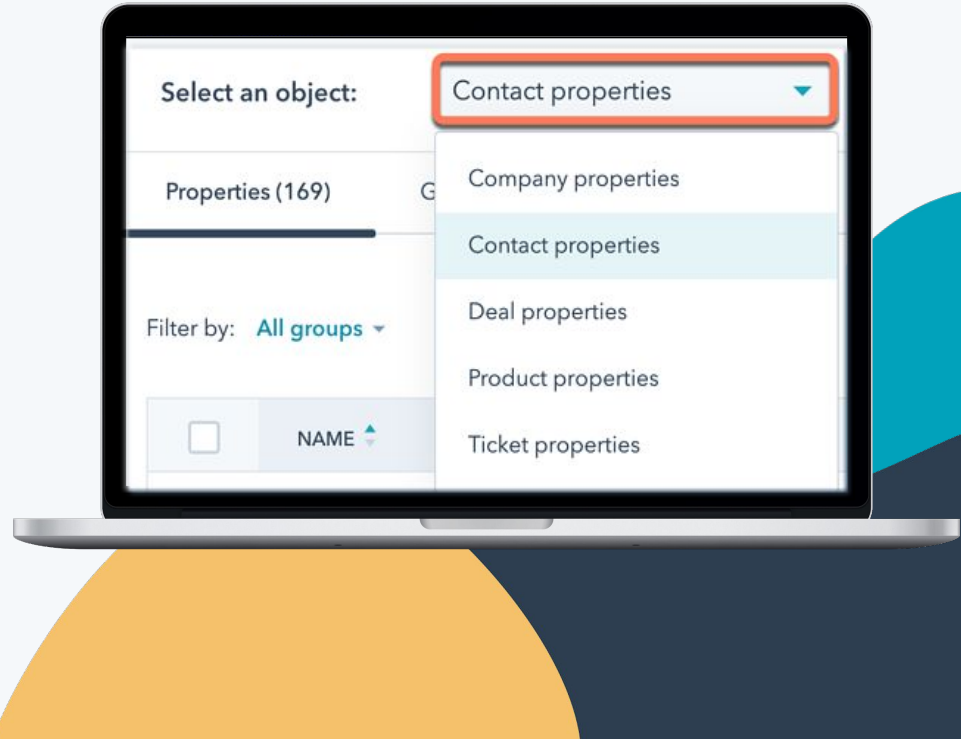
What is a property?

Used to store data on HubSpot's standard CRM objects, custom objects, and products.



Default Properties

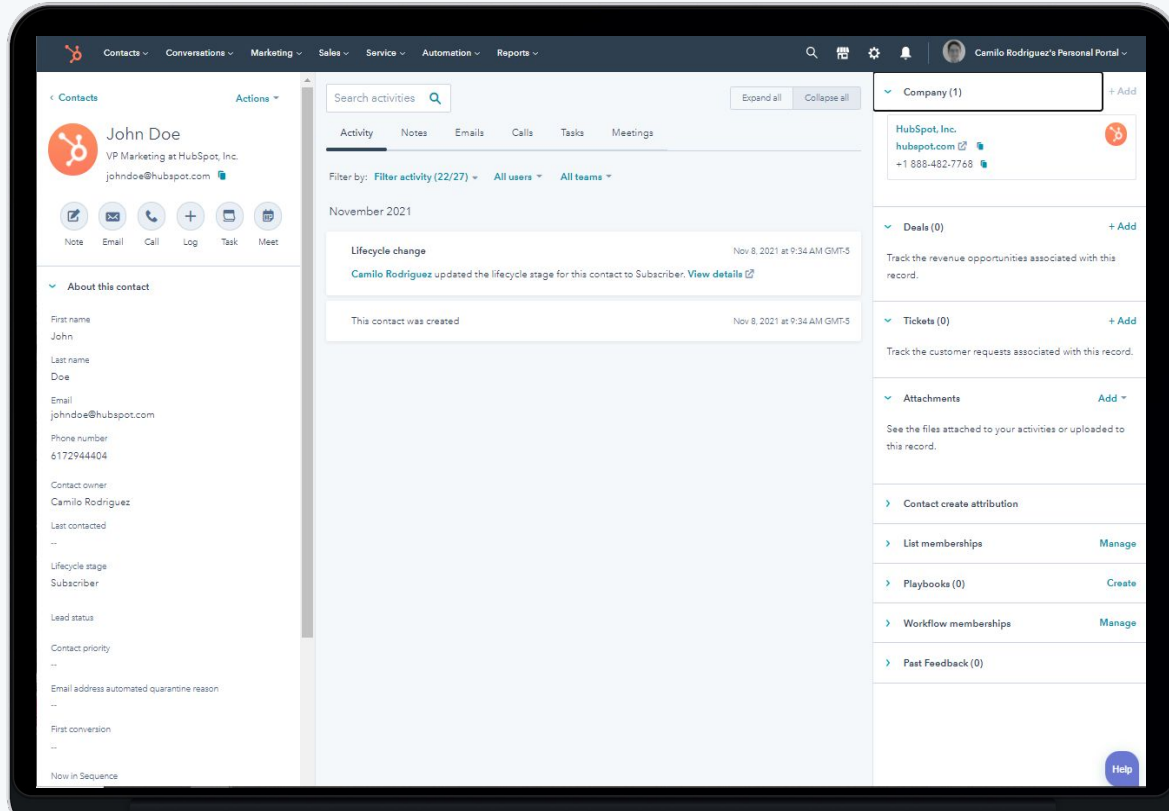
- Contacts: Email address, last time a form was filled out
- Companies: Mailing address, phone number, city
- Deals: Amount, close date, deal owner
- Tickets: Ticket status, ticket description



Demo time!

Let's jump into HubSpot to see how you can view, edit and associate records.







Activity

Let's create a custom property!





Activity

Let's create and import records!



Segmenting Records

- Use views and lists in HubSpot to segment your database based on information stored on records
- Allows you to target your efforts based on different criteria such as region, level of engagement, etc.
- With views, you can review different groups of records at a glance
- Lists allow you to take action with segments of contacts and companies
- Flexible Associations allow you to associate multiple companies to a contact, deal, or ticket record.





Activity

Import one object, then associate it and segment records.



Step-by-Step Guide

1. Setup your import files
2. Import a one object file
3. Create a company
4. Associate the contacts to said company
5. Create a view
6. Create a list
7. Create a deal and associate it with the contact.
8. Create/log a call/meeting.
9. Create a Task
10. Associate an additional company record and set association labels



Thank you

