intergage
marketing engineers

HubSpot Data Hygiene Guide

The Ultimate Guide To Keeping Your HubSpot Portal Fighting Fit

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The Ultimate Guide To Sales & Marketing Success With HubSpot [Workshop]

Why Do You Need This Guide?

You've made a huge investment in HubSpot and the CRM is at the heart of the software. It contains the crown jewels of your business – your valuable contact and prospect data!

However, as you implement more marketing campaigns, add more contacts into the database and start working those contacts, you could find your database getting out of control without the right management.

A growing database is a great thing… Until it becomes outdated.

Email marketing data decays naturally at a rate of around [22.5% every year]. This happens as prospects move from one company to another, they may opt out of email communication, and others may completely change roles meaning your messaging is no longer relevant to them.

So, why is keeping your HubSpot data clean important?

To make the most of HubSpot's powerful tools and software, your data needs to be in good shape. If it's not, you're going to find it difficult to use some of the features that make HubSpot so great! You may even find tasks as basic as creating email lists a challenge!

This guide will provide you with some practical tips and how-tos for keeping your HubSpot database in tip top condition.

Let's get started!

Use Automation Tools To Update Properties and Format Data

As you'll know, HubSpot's database is made up mainly of company and contact records which are linked together or 'associated' to one another. Traditionally, there will be one company to many contacts meaning you may have anything between 2 and 100 (potentially more) records to maintain for any single company.

This can be difficult when it comes to maintaining information that's relevant to both companies and contacts. For example:

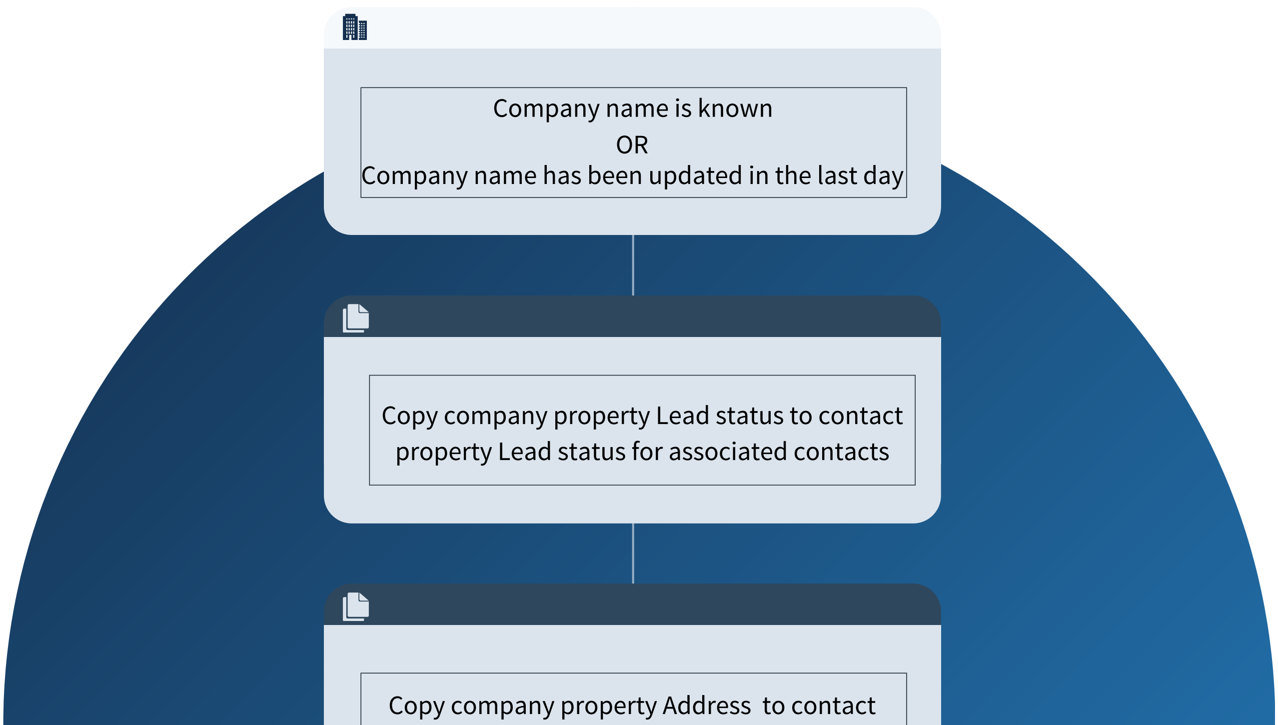
- address
- payment terms
- company owner
- industry.

This could cause issues when it comes to creating email lists and communicating with your clients/prospects. For example, a salesperson may change the lead status of a company from prospect to client when a deal is closed. However, the system won't automatically update all of the associated contacts.

That means the contacts that now should be classed as customers may continue receiving information meant for prospects.

In these cases, it is easy to set up a workflow that automatically copies the company information to the contact so the system is continually keeping itself up to date! Information can also be copied the other way around e.g. from company to contact and across different objects such as deals.

It's a great way to keep your database clean while requiring minimal effort from you and your team!



Use Automation Tools To Update Properties and Format Data

If you have Operations Hub professional or enterprise, you can also use the format data workflows action to fix, format and maintain your CRM data. For example, you can capitalize contact or company names, or calculate values based on properties.

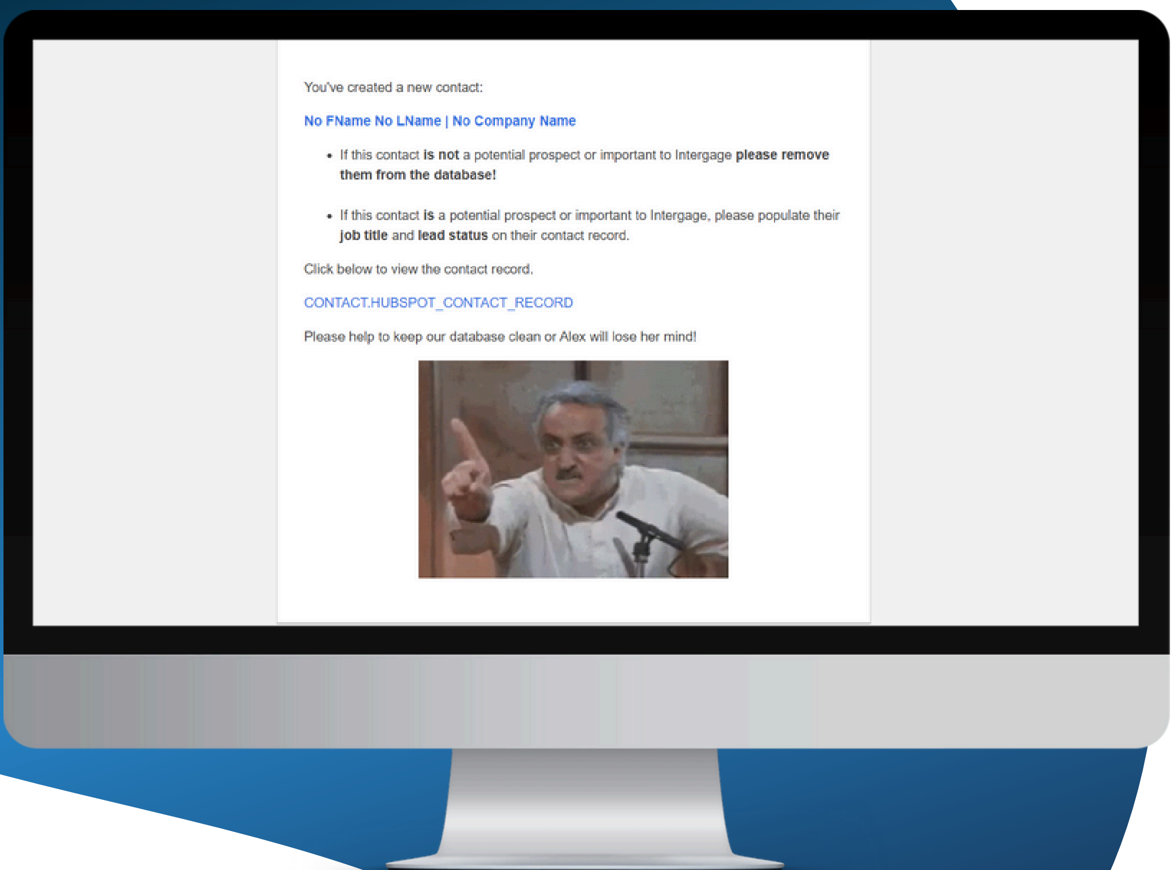
This can be really useful especially where data enters your CRM through forms which rely on the user themselves to input data. The feature automates data cleansing and does a lot of the heavy lifting for you! Win!

Use Notifications When Someone Creates A New Record

Sometimes it's easy to forget when we've created new contacts – especially if you've synced your email inbox with HubSpot. This often means a new contact is created every time you email a new person.

Using email notifications is a great way to alert HubSpot users when they've created a new contact. This automated notification might come in the form of an email alerting the user that they've created a contact/company and to check all the relevant fields have been completed. Alternatively, it can act as a reminder to delete contacts that don't need to be in the system.

As a side note, we find adding a funny/eye catching gif to these emails can be a good way of making sure your team take action. Take a look at the example below!



Automating Your Sales Pipeline

It's likely your sales team are more focused on moving their sales opportunities through the pipeline than updating the CRM database (understandably). However, not updating the database can have adverse effects on marketing's ability to push contextual messages out to contacts at their relevant stages of the buying journey.

This could lead to contacts receiving the wrong marketing messages, your clients missing out on services they rely on or lost/lapsed prospects still being chased for sales.

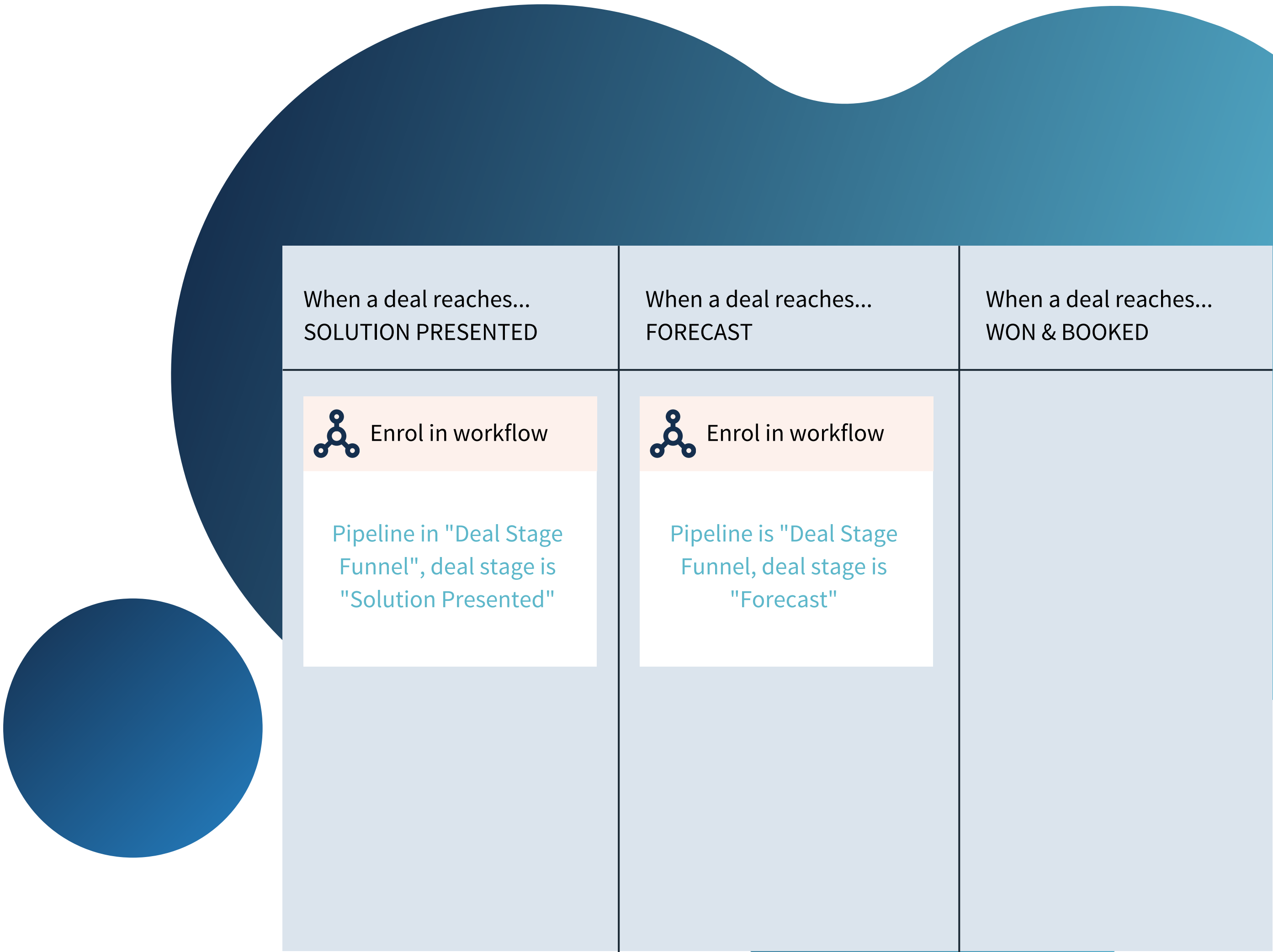
We'd recommend enabling automation for your sales pipeline to prevent this from happening. This allows you to automate actions based on when a deal moves through the sages of your pipeline. This might include:

- changing company lead/lifecycle stage as an associated deal moves through the pipeline
- adding contacts to certain lists depending on what product/service they're looking to purchase.

There's two ways you can do this.

1. In the normal HubSpot workflow tool
2. Within HubSpot's pipeline automation tool.

Both achieve exactly the same result, however, using the pipeline automation tool means your sales and deal workflows are kept tucked away from the rest of your marketing workflows.



Find Duplicate Companies And Contacts

It’s relatively common to find yourself with multiple records for a single contact or company. This can often occur if a contact has multiple email addresses (personal and work for example) or if a company uses several domains.

This can cause any number of problems, the main one being an increase in cost for HubSpot. As you know, you pay for the number of contacts you keep/use in HubSpot so having multiple contacts that aren’t needed could be costing you money!

Duplicate data can also cause confusion within your team or even worse, mean some contacts receive the same email twice.

Luckily, HubSpot has a handy tool to help with this. However, it’s not particularly obvious so lots of people miss it! Within your portal, if you navigate to contacts > actions > manage duplicates there is a duplicate record manager for both contacts and companies so you can easily spot and rectify duplicate record issues.

Standardise How You Input Data

The likelihood is you have lots of people working on your HubSpot portal. They'll be inputting data, updating records, connecting objects and more.

If you don't give your team a structure to work by, you'll find your database getting out of control, especially when it comes to adding records.

Standardising how your team input data is crucial and sets an example for what is expected of them. After all, everyone who benefits from the system is responsible for ensuring the data is kept accurate and up to date.

We'd recommend stipulating what you expect from your team when they input new records into the system. Especially when it comes to contacts and companies. For example, are there particular fields that need to be populated?

In our experience it's best to have the following properties populated for all contacts and companies.
<u>Contacts</u>

- Name (first and last)
- Email address
- Job title
- Company name
- Lead status

<u>Company</u>

- Company name
- Website URL
- Lead status
- Industry
- Company owner

It's best to choose properties that are used most often to segment your data. You may have more or less required properties than those listed above.

The easiest way of achieving this level of consistency is by making these properties required when setting up a new record. To customise which properties are required go to settings > objects > companies > customize the 'create company' form. It's the same process for contacts too!

For any that may slip through the cracks for example, when importing contacts or companies into the system, you can set up lists to show the contacts and companies that don't have the required information. For example, if you want a list of contacts that don't have a lead status, you can create a list with the criteria "lead status is unknown".

Have A Process For Deleting Contacts

As you know, HubSpot subscriptions vary depending on how many contacts you market to/keep in the database. Therefore, holding onto old/useless data is not recommended. It leads to unnecessary costs and data bloat.

However, that isn't a license to delete contacts and companies willy-nilly! It's important to have a process for this.

One of the most common questions we're asked is whether you can automate the deletion of records. This isn't currently a feature HubSpot supports so, you'll need to delete old data manually.

In order to do this, set a standard of what should and shouldn't be in your HubSpot database. For some companies, this might be contacts/companies that haven't been active in 2+ years, for others it might be contacts that have opted out of communications and for others it's less clear cut.

However you decide to manage the deletion of contacts, ensure everyone understands this process and why this data should or shouldn't be in your database.

Again, this might be something you choose to create lists for to make it easier to manage. HubSpot won't automatically delete contacts for you but it will group contacts together based on your criteria for deletion.

Partner With A HubSpot Expert

If you're feeling completely overwhelmed with your unruly HubSpot database and don't know where to start – don't panic! Sometimes it's best to speak with an experienced HubSpot partner to navigate your way forward. Partnering with a HubSpot agency is a great way to get the support you need when it comes to data clean up and strategy.

At Intergage we can help HubSpot users with consultancy, data clean up and support when it comes to putting a strategy in place for futureproofing your HubSpot portal. We'll also help train and support your team so they are able to take up their responsibility for maintaining your very valuable database.

Additional Tips

As well as the tips we've gone through so far in this guide, there are a couple of additional best practices to ensure your data remains as clean as possible!

<u>Assign a HubSpot hero</u>
Every HubSpot portal needs a hero to set an example and take responsibility for managing and cleansing the database. As you've downloaded this guide, the likelihood is that responsibility lies with you. If not, pass this guide to your company's HubSpot hero and ensure they're clear on what their responsibilities are.

<u>Set a schedule</u>
Along with your HubSpot hero, you should also have a schedule for cleansing your database. This means being clear on how often you will cleanse the data. This might be quarterly, monthly or even weekly depending on how large and active your database is. However frequently you decide to cleanse your data, stick to your schedule and keep that portal clean!

Who Is Intergage?

Intergage is a UK based digital marketing agency and Platinum HubSpot Solutions Partner.
We help ambitious B2B businesses evolve marketing, accelerate lead generation and enhance processes with proven ROI.

With more than 500,000 hours of digital marketing experience and 70+ HubSpot certifications, you're in safe hands with Intergage! Whether you're looking for help onboarding onto HubSpot, want to audit an existing portal, or even build a HubSpot website - we have the proven experience required to help you achieve results. Fast.

HubSpot is a brilliant tool that can transform your business. But it can't do all the work for you. Intergage is here to help you get every bit of value from your HubSpot investment and use the software to its full advantage.

Average 5/5 Star Ratings For HubSpot

The Ultimate Guide To Sales & Marketing Success With HubSpot [Workshop]

It’s predicted that more than 10,000 UK companies rely on HubSpot – but are they failing to succeed with the platform?

As a HubSpot Platinum Solutions Partner, we’ve seen the unwary make mistakes with HubSpot time and time again.

Mistakes that mean you don’t get the most from the platform. Mistakes that end up costing you money and if you’re not careful, customers.

We want to share our wisdom with you and tell you what those mistakes are… and how to avoid them in a single workshop.

Perhaps you’re not getting the return you expected from HubSpot. Maybe you know you’re not using the tools available within the platform and need a bit of direction. Or, you’re keen to learn more about the software and make your sales and marketing more efficient.

This 60-minute workshop will show you the 6 most common mistakes we’ve seen HubSpot users make. It includes:

- The cost of dirty data
- Information on how to get your sales team to adopt the software
- How NOT to waste money on additional tools
- Tips for sales and marketing efficiency with workflows
- Information on what a real campaign looks like
- The reports your HubSpot portal needs.

Download the workshop here