

August Campaign Guide: Customizable CRM



Target Audience:

Marketing/Sales/Ops Leaders

Product Focus:

CRM Platform: Business Units,
Automated Sequences

Campaign Theme

CRM is no longer just a sales tool. It is the heart of scaling businesses.

HubSpot's customizable CRM works for you, not the other way around. Implement custom permissions, custom properties, and custom behavioral events to align your teams like never before, and do it all with a seamless UI that'll help you achieve adoption like you've never seen.

Why this is important:

Today, customer expectations are at an all time high. Therefore, CRM software has to be more than simply a digital rolodex for sales.

In order to be successful, companies need a fully integrated CRM – one that can both facilitate and optimize the entire customer experience.

What do we do differently?

HubSpot's CRM is crafted, not cobbled, enabling you to create a remarkable experience for your audience and end users.

With HubSpot, you don't have to choose between powerful OR easy-to-use. And when you need to make changes, it's quick, seamless, and easy to manage.

Why HubSpot:

HubSpot CRM brings together best-in-class tools for everyone while giving them the flexibility to customize, and architect their instance in a way that allows every team to thrive.

- **Adopt:** As the heart of your business, your CRM platform needs to be accessible and easy to adopt. HubSpot offers an intuitive and easy-to-use UI that's loved by sales reps and admins alike.
- **Align:** HubSpot's CRM platform offers granular permissions so you can maintain control and empower each team to focus on what matters most to them. And with business units, you can configure and organize different brands under a single HubSpot account.
- **Adapt:** HubSpot makes it easy to customize your instance of HubSpot with custom objects, and a customizable UI. As things change, it's easy to adjust your HubSpot portal with minimal dev work or downtime.

[Visit the Flywheel Campaign HQ for resources](#)

New Features

Business Units

Add-On

Business Units is a delineation of your multiple brands in a shared HubSpot portal.

With business units, you can confidently manage contacts, marketing and sales assets, and settings across multiple brands with HubSpot.

Easily run cross-sell and upsell campaigns to reach every segment of your audience, track contact interactions and communication preferences with each brand, and report out on performance across your business, or zoom in on one brand's results.



[Watch Demo](#)



[How it differs from Domains](#)

Automated Sequence Enrollment

Enterprise

Sales reps are challenged with juggling their many sales tasks and are often unable to follow up with new leads as quickly as they'd like to get the best results.

With this update, you can now automate the follow up by using a workflow to enroll and unenroll contacts in sequences. While marketing emails have long been available in workflows, sequences offer the personalized, dedicated touch prospects expect. By combining these two tools, your team can conduct attentive sales outreach at scale to close more deals.



[Learn More](#)

What's Improved? August 2021

Taking it to the Next Level: Existing CRM Feature Upgrades

Custom Objects

Enterprise

Custom Objects Settings Page

Admins will find a "Custom Objects" option in their settings after creating a custom object for their hub. "Custom Objects" will have settings for each custom object the customer has created.



[Learn More](#)

Custom Objects Properties in Forms

In many cases, our customers may have the need to collect data via forms from their customers about one of their custom objects. With this release they can now add properties from their custom objects directly to HubSpot forms and collect important data from their customers that's unique to their business.

Custom Object Filters in Lists

Build out and power your contact lists - contact email, automation, scoring, and more - with filters from custom object and ticket properties. In addition to the current filter families of contacts, companies, and deals, you'll now also see tickets and every custom object in your portal.

Custom Behavioral Events

Enterprise

The new custom behavioral event allows you to define and fire events on your own terms. You can create custom properties for events, automate workflows based on custom behavioral event properties, attribute revenue to specific events in the report builder, and more - even when these events happen outside of HubSpot.

With custom behavioral events, you can:

- Track logins to external websites
- Compare browser and mobile usage
- Track abandoned shopping carts
- Track usage on any clickable element
- Create custom funnels to track user journeys

Customizable UI

Enterprise

CRM Card Customization

From now on, you define and decide what properties appear on board and association cards. Your chosen fields will serve as a default, consistently displaying the properties that matter most to you.



[Learn More](#)

Deal Priority

Set the level of attention needed on a deal with the new default deal priority property. View priority property on deal boards in the "about this deal" section of the record sidebar.



[Learn More](#)

Translatable Properties for Import & Export

Request exports from HubSpot in your preferred language -- and import files with column headers in your preferred language for HubSpot default properties.

[Learn More:](#)

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