

## HubSpot's Customizable CRM

## Centralized, Dynamic, and Powerful

At HubSpot, we know you are relying on a platform that brings together best-in-class tools for marketers, sales, and service people while giving you the **flexibility to customize, create permissions, and architect your instance** in a way that allows every team to thrive.

With HubSpot's latest updates to our CRM, cross-functional teams can confidently and harmoniously work towards company goals. This means quicker results, more transparency into business gaps, and stronger strategic pivots.

## **Recent Improvements**

#### Architect Your Business Without Added Complexity

Make your CRM the heart of your business with a customizable platform that implements custom permissions, custom properties, and custom behavioral events to align your teams like never before.

## **Custom Objects**

Custom-build your CRM to work for your everyday. Organize and represent your business data your way with additional features added to HubSpot's custom objects.



#### **Custom Objects Properties in Forms**

HubSpot Forms now supports properties from custom objects too! With this release you can now add properties from your custom objects directly to HubSpot forms and collect important data from your customers that's unique to their business.

#### Available on: Marketing Hub Enterprise



#### 1:1 Email from Custom Object Records

Send one-on-one emails to contacts directly from custom object record pages. When assisting prospects or customers, you may need access to information stored on a custom object record.

You can now email from within a custom object, so that you have all the context you need while composing your message.

Available on: All Enterprise Plans

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#### **Custom Objects Settings Page**

If you're an Admin in your portal, you will now find a "Custom Objects" option in your settings after creating a custom object for your hub.

"Custom Objects" will have settings for each custom object you create. These include:

- Managing properties
- Editing the new record creation form
- Selecting the properties for display on an association card

Available on: All Enterprise Plans

## **Automated Sequence Enrollment**

Prepare to take your sales outreach process to the next level with the power of marketing automation and updated enrollment capabilities.



With this update, you can now use 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.

Available on: Sales Hub Enterprise, Service Hub Enterprise

## **Custom Behavioral Events**

Every business is different. To help you scale, we've ensured that you can capture the moments that matter most across your customer journey - even when those interactions occur outside of HubSpot.



With custom behavioral events, you can uplevel your behavioral marketing strategy by defining and firing events on your own terms.

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

You can create custom properties for events and hyper-personalize your marketing by leveraging custom behavioral event properties in workflows. Deep dive into your customer journey by attributing revenue and contact or deal creation to specific events and interactions.

Available on: Marketing Hub Enterprise

### **Business Units**

Delineate with ease. With the introduction of business units, you can now 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.

For more information click here.

Available as a Marketing Hub Enterprise Add-On\*

## **Customizable UI**

Achieve adoption like you've never seen with a seamless UI experience. Modify your CRM to display which properties and deals matter most to your business, so high-priority initiatives stay top-of-mind.

CRM Card Customization	Access Requests
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.	As an admin, it's your job to empower your team and keep things under control. It's a tough balance to strike. The new access request feature makes it possible for marketers to request further access to assets and tools in HubSpot. This means it is even easier for admins to grant access and adjust permissions as needed.
Available on: All Pro+ Plans	Available on: Marketing Hub Pro+
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Deal Priority	Translatable Properties for Import & Export
Struggling to understand the importance and urgency of certain opportunities? 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.	Further adapt your HubSpot portal to your company with the new ability to request exports from HubSpot in your preferred language and import files with column headers in your preferred language for HubSpot default properties.

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Available on: All Free+ Plans

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## **Timeline Improvements**

With a more streamlined CRM record, information on your activity timeline is now condensed and collapsable, so you can see more valuable data at once.



Get access to smaller highlight cards, collapsing carets, and new slimmer association cards. All of this means less scrolling and more time enjoying the good stuff.

Available on: All Free+ Plans

# Feed Your Appetite for Customization

## HubSpot's CRM Customizable Apps

Our recent collection of apps help you centralize and enrich your HubSpot CRM Platform with data obtained through other apps from your software stack.

Extend the functionality of your software stack by connecting HubSpot CRM Platform with calling, SMS, accounting & finance, project management, eCommerce, and quote management apps.