# **CRM Customization**

### Why Choose HubSpot?



#### **Easy to Customize**

HubSpot customization allows you to adjust your CRM to fit your unique needs, all without the need for a developer\*.



#### **Fast Time to Value**

CRM Customization streamlines processes, enhances data accessibility, encourages user adoption, and aids in scaling with your business's growth.



#### **Powered by Unified Data**

Scalings businesses can leverage CRM customization during uncertainty so that reps can focus on making meaningful connections.

#### What is CRM Customization?

CRM customization allows you and your team to use custom objects, properties, and associations to organize specific data models in HubSpot's Smart CRM.

You can start customizing right away! Most customization in HubSpot can be done without any additional cost or resources. More complex customizations may require additional time.

#### Why should I customize HubSpot's Smart CRM?

Customization matches your tools to your processes, which in turn removes distractions and inefficiencies among your teams.

## What HubSpot plan do I need to customize the CRM?

All free plans include a level of customization, including the ability to configure system defaults. Professional plans provide the ability to configure elements by team. If you need to use the UI extensions, Sales or Service Enterprise will be required.

|                        | HubSpot  | salesforce | Dynamics 365 | Z O H O  | Marketo™<br>An Adobe Company | <b>Z</b> endesk |
|------------------------|----------|------------|--------------|----------|------------------------------|-----------------|
| Custom Objects         | <b>✓</b> | <b>✓</b>   | <b>✓</b>     | <b>✓</b> | <b>✓</b>                     | <b>✓</b>        |
| Associations           | <b>✓</b> | <b>✓</b>   | <b>✓</b>     | <b>✓</b> | <b>✓</b>                     | <b>✓</b>        |
| Custom Properties      | <b>✓</b> | <b>✓</b>   | <b>✓</b>     | <b>✓</b> | <b>✓</b>                     | <b>✓</b>        |
| Playbooks              | <b>✓</b> | <b>✓</b>   | <b>✓</b>     | <b>✓</b> | X                            | X               |
| Custom Applications    | <b>✓</b> | \$\$\$     | \$\$\$       | \$\$\$   | X                            | <b>✓</b>        |
| Custom Cards           | <b>✓</b> | <b>✓</b>   | <b>✓</b>     | \$\$\$   | X                            | <b>✓</b>        |
| UI Extensions          | <b>✓</b> | <b>✓</b>   | <b>✓</b>     | \$\$\$   | X                            | <b>✓</b>        |
| Validation Rules       | <b>✓</b> | <b>✓</b>   | <b>✓</b>     | <b>✓</b> | <b>✓</b>                     | <b>✓</b>        |
| Conditional Components | X        | <b>✓</b>   | X            | X        | X                            | X               |

Enterprise editions for all platforms shown above



HubSpot matched our expectations for several reasons. We loved its flexibility, ease of operations, and pace of scalability. It was intuitive to pick up and adopt, and had a very user-friendly interface that was easy to adapt.

