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Company Name:
Custom HubSpot Properties

Overview

Data is the foundation of everything you do in HubSpot. Contact segmentation, lead routing rules, targeted email messaging, personalization tokens, list creation, ads audiences, reports—it's all powered by data.

Where is all that data stored? Within HubSpot properties (also called fields).

By completing the worksheet below, you'll have a solid data strategy and a set of actionable steps to create your custom fields!

Default Properties

HubSpot comes with hundreds of default properties right out-of-the-box, such as:

- Email address
- Industry
- Country/Region
- Company Name
- Create Date
- Close Date
- Deal Stage
- Amount

(In case you're curious, here's the comprehensive breakdown of default properties for all objects: Contacts, Companies, Deals, and Tickets.)

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It's important to note that each object has its own set of fields that do not automatically apply to other objects. For example, let's say a *company* has "country/region" data, either populated by HubSpot Insights or manually entered via form submission. This data will NOT be automatically passed on to *contacts* who work at that company...unless you create a workflow to do that.

Custom Properties

The default HubSpot properties are a great starting point, but odds are you'll have to create at least a couple of custom fields to get the type of **segmentation** and **reporting** for your specific business needs.

After all, if you aren't recording a data point, HubSpot can't segment or report on it in the future!

Some popular custom properties we see clients creating are:

- User type
- State/province dropdown
- Region (NA, LATAM, APAC, EMEA)
- Product/service type

Now that you understand the difference between default and custom properties, let's get started creating new fields!

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Step #1: Identify *what* data needs to be collected

Why do you want to collect a specific data point? What will it "do"?

Is there value to collecting data that you'll never use? Probably not. Instead, think about how custom data could power segmentation and reporting, like:

- Do I need to segment emails based on a property that doesn't already exist in HubSpot?
- Should I change lead assignment based on data that could be collected in a custom field?
- If I'm being selective about assigning marketing contact status, do I need a custom field to determine who should always get that? Who should *never* get that?
- Do I want to report on a data point not included in HubSpot?

Are integrations automatically creating custom fields?

If you integrate a platform like Salesforce or Microsoft Dynamics, it'll automatically create custom fields so that the data in HubSpot is an exact mirror of their system. The problem? If you create a custom field in HubSpot, it will NOT be automatically created in the other tool.

What data points are you currently collecting that need to be replicated in HubSpot?

What data are you already collecting? Where? Gather it all together and review what types of information you're already logging. Consider whether you're capturing data related to contacts, companies, deals, tickets, sales activities, etc. Let's replicate it in HubSpot!

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What questions are you asking on current forms?

If you're asking more than the basics on your current forms, odds are we'll need to create a custom field to capture that data going forward...even if you don't want to use HubSpot forms.

Why? As soon as you install the HubSpot tracking code on your website, all of that form info will flow into the platform—we need to make sure it has a place to land! If you don't create a field within HubSpot, then the data won't attach to the contact who submitted the form.

What do you want to report on?

Consider what types of info you're reporting on. Does your leadership team review a weekly sales activity report? Are quotas measured a certain way? Do you display how many contacts are created or deals are closed by industry, state, country, job title, product type, etc.? Make sure you have a property to gather and organize data in your desired reports.

Are other departments using notes for info that should really be captured in a custom field?

If your sales, service or account management teams are consistently leaving the same type of info in notes, you could create a custom field to streamline their process, add the ability for segmentation and make reporting easier.

What's on your data wish list?

If you've always wanted to categorize your database by favorite dessert type...or send emails based on what type of pet your contacts have...or assign leads based on hair color—now's the time!

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Step #2: Decide *how* you want to collect data

Once you determine what data you're going to collect, you'll have to decide on a field type. Below are some of the most popular types with a brief description and ideal use case.

Single-line Text

- Stores a single string of text
- Ideal for: name, email address, company name, etc.
- Disadvantage: Anything can be entered. For example, if you want to capture state, be prepared for Michigan, MI, M.I., Mich., or any variation of misspelling. That means you'd have to include ALL the options for Michigan in your list, workflow or report criteria...what a pain

Multi-line Text

- Stores multiple lines of text with virtually no limit
- Ideal for: comments section or areas where anecdotes and additional info is valuable
- Disadvantage: not useful for reporting or segmentation purposes

Single Checkbox

- Stores only two options, like yes/no, true/false, on/off
- Ideal for: segmentation purposes
- Note: in forms, this appears as a single checkbox where checked equals true and not checked equals false.

Multiple Checkboxes

- Enumeration field that presents and stores *many* options
- Ideal for: data that can be many things at once, like "What Hubs do you use?" where the response can be any combination of Marketing, Sales, Service, Operations and CMS Hubs

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Number

- Similar to single-line text, the number field is an open field, but is reserved for a string of numbers only; can be formatted as currency
- Note: list and workflow criteria can only include whole integers, so make sure to use “less than” or “more than” to capture numbers with decimals

Dropdown Select

- Enumeration that is similar to multiple checkbox fields in that it presents and stores several options, but only one value can be selected
- Ideal for: data that can be only *one* of many things, like “Department,” where a contact can only be in Human Resources, IT, Marketing/Sales OR Finance

Score

- Calculation field that scores based on custom attributes that reward or detract points for contacts, companies, or deals
- **Spoiler alert:** this is how you do lead scoring

HubSpot User

- Field that automatically populates with a list of your current HubSpot users; you can use this field to create up to 30 custom owner properties
- Ideal for: denoting a team member other than the default Contact Owner property, like BDR or Account Manager

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Sample Custom Properties Matrix

Object	Field Name	Description	Field Type	Values	Where will this be used?
Contact	**Contact Type**	This field describes the type of contact.	Dropdown Select	• End User • Vendor • Reseller • Employee • Job Applicant	• Left hand sidebar of the contact record • Hidden field on specific forms, i.e. request a demo • Workflow trigger criteria to target the correct contact types and exclude others • Report criteria
Company	**Region**	Indicates what region the HQ of the company is in.	Dropdown Select	• NA • LATAM • EMEA • APAC	• Left hand sidebar of the company record • List criteria to segment contacts by their companies HQ location • Workflow if/then branch to assign leads to correct rep
Ticket	**Issue Resolved**	Checkbox to indicate if issue has been resolved and ticket should be closed	Checkbox		• Left hand sidebar of the ticket record • Workflow that updates ticket status to closed and sends email to contact
Deal	**Project Type**	Specify the type of project(s) this prospect is interested in.	Multiple Checkboxes	• Website • HubSpot Implementation • HubSpot Training • Branding • Retainer	• Create new deal form • Left hand sidebar of the deal record • List criteria to segment contacts by their project type

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YOUR Custom Properties Matrix

Object	Field Name	Description	Field Type	Values	Where will this be used?

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