HubSpot – Contact Creation Guide

When creating a contact in HubSpot there are some things you must know beforehand!

The following properties are required fields:

First and Last Name

Customer Type: Defines the client's role.

Vertical Market: Vertical Market is defined as a market encompassing a group of companies and customers that are all interconnected around a specific niche. SKG has the following vertical markets: Education, Government (Federal, State, Local), Healthcare, Corporate, Tech. There are sub-categories in each vertical market. Pick the one that's applicable to your contact.

Lead Status: Choose from the following

- New: These are leads you have not yet reached out to. Researching and gathering information.
- Attempted to Contact: These are leads you have tried to reach out to but have not been able to successfully connect with yet.
- Connected: These are leads you have been able to contact but are not yet opportunities. A lead with this status may still be waiting on a booked meeting with a decision-maker on their team or may still be working to establish a budget.
- In Progress: Once you have secured a meeting and connected with a customer, you are still gathering information.
- Future Follow-up: Follow up with the company or contact in the future, set a reminder.
- Unqualified: Contacts may become unqualified for several reasons. These are leads that may have told you they are no longer interested in moving forward or leads you have determined are not a good fit for your product. This status may also indicate an opportunity to send this lead back to your marketing team for a marketing campaign.

- Open Deal: These are leads that have expressed interest in buying your product or service. You have already opened a deal with them.

Lifecycle Stage: Choose from the following

- Subscriber: A contact who has opted in to hear more from you by signing up for your blog or newsletter.

- Lead: (Business Development) Potential opportunity that has not been qualified yet. There is no official deal assigned yet.

- Marketing Qualified Lead: A company or contact that the marketing team has qualified as ready for the sales team.

- Sales Qualified Lead: A company or contact that the sales/am team has qualified as a potential customer.

- Opportunity: A company or contact who is associated with a deal (e.g., they are involved in a potential deal with SKG).

- Customer: A company or contact with at least one closed deal.

- Evangelist: A customer who has advocated for your organization.

- Other: A wildcard stage that can be used when a contact does not fit any of the above stages.

Buying Role: The role that a contact plays during the sales process.
For example: An influencer could impact the decision made on how to proceed.

Job Role: The description of the person's function within their company. There are specific options to choose from. Pick the most applicable one.

Job Title: The specific title of the position the person holds. This is a free-type field to input their job title.

CEU Requirement: This is a "yes/no" field to indicate if the person needs CEU's to stay licensed.
For example: Registered Architects or Interior Designers (AIA, NCARB, IIDA, RID). We use this field to know who we need to invite to CEU classes, webinars, etc.