SOP for Creating Contact and Company Records in HubSpot

This SOP outlines the most efficient way to create contact and company records in HubSpot while you're in the field. By following this process, you’ll save time with fewer clicks, making it easier to log important details quickly.

Standardizing this ensures that our records stay organized, keeping contacts properly linked to their companies—benefiting not just you, but the entire team.

SOP

When creating either a company or contact record, please always go to the “Companies” page first to see if we already have the existing company record. If we do not have an existing company record for that company, then create the company record first, and then create the contact from inside the company page.

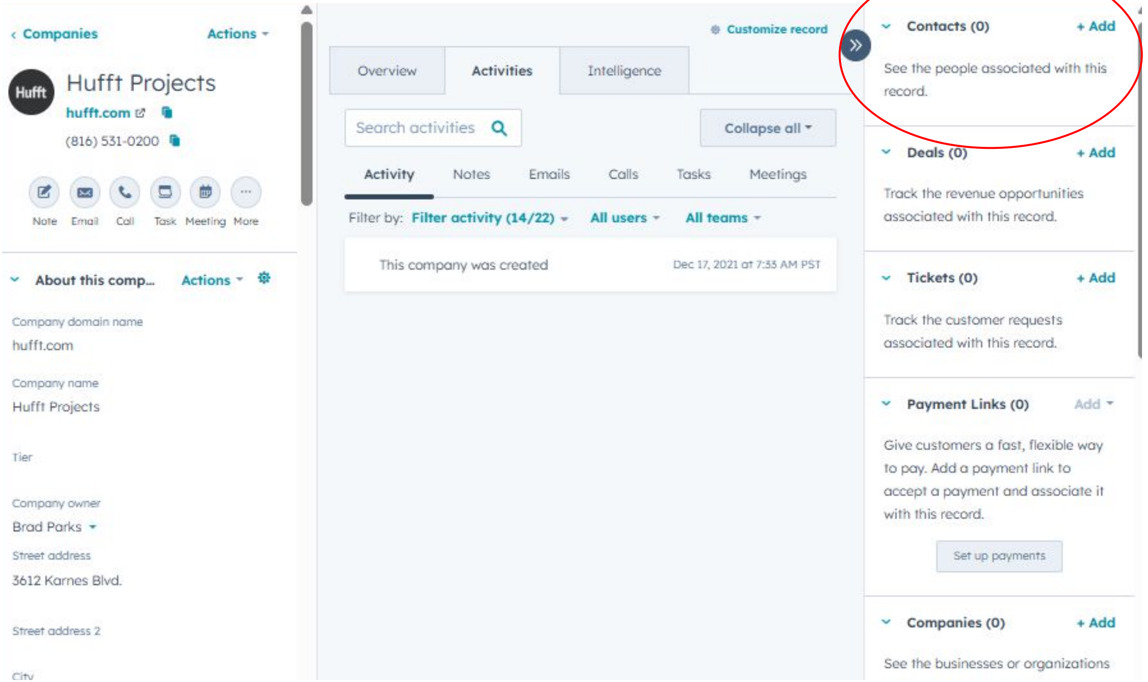
Always make sure the company record exists first and then create the contacts from the company page.

This ensures that we have all the necessary company records and that they are properly associated with our contacts.

**If you are dealing with a multi-location customer (Ex. LaForce, Kendell, C&B) make 100% certain you have the correct company location selected before inputting your contact. The contact will be associated with the wrong location if you don’t!

If we already have an existing company record…

1. First, navigate to the "Companies" tab and search for the company you are trying to create.
1. If we already have that company in our company records, click into that company's page.
2. In the top right corner, you will see the "Contacts" section. Click the "+Add" button (circled in red) to create a contact from there.



If we do NOT have an existing company record…

1. If you searched for the company in the "Company's" page and cannot find it, then please create one for that company.
2. Once the record is created for that company, proceed with the same steps as the previous slide by clicking on the "+Add" button in the top right (circled in red) and create your contacts from there.