How to segment your Hubspot Data & Contacts

Guaranteed to Improve Efficiency for Sales & Marketing Teams

REVIO

Introduction

Hubspot filters allow you to quickly view a segment of your database right from the contacts, companies, deals, or tickets dashboard.

You can use any default or custom property in your HubSpot account to segment your contacts using saved filters.

Contacts will be added or removed from saved filters automatically based on whether or not they currently meet the criteria you've set.

These are some of the most common filter examples that we have come across over the years when dealing with Hubspot clients. Some of the filter examples are using custom fields and are set by active workflows.

Common Hubspot Filters that will help segment your data and contacts.

15 Useful Hubspot Filters

REVIO

Hubspot Specialists

FILTER#1: Total No of Sales Activities

This filter shows the total number of Sales activities (notes, calls, sales emails, meetings, or tasks) logged for a contact.

It is a good indicator to show how active your sales staff are in terms of outreach effort, and if any prospects are going stale. In this example we are filtering on prospects that have had zero activity. We are also narrowing down the contacts by lead status.

FILTER#2: Last contacted

This filter shows the last time a call, email, or meeting was logged for a contact. In this example we are filtering on'last week', which will show all contacts that were contacted during the previous week. It is a useful indicator which can be used in conjunction with the date field to see how many prospects have not been contacted since a certain date.

We will see how we can build on this filter later on, to help target priority prospects.

FILTER#3: Number of page views

This filter shows the number of page views and gives a broad indication on how active a prospect has been on your website.

In this example we narrow down to all prospects that have over 10 page views.

Later, we will see how this contact parameter can be used in the Hubspot scoring calculation to help prioritise prospect outreach.

FILTER#4: Leads not assigned & with Lead status is 'Unknown'

This incorporates two Hubspot built in filters called, 'Lead status' & 'Owner assigned date'.
In the example below, we want to view how many contacts have no 'lead status' or contacts whos owner assigned date is unknown.

Useful to see which contacts have slipped through the net and are not being chased because the they have not been assigned an owner. Contacts with no 'lead status' can occur when importing contacts from a file. This can be important, as sales may be just filtering using lead status 'new', which is the default lead status for a lead filling in a form. They would potentially not see these other leads on their radar.

TIP# You can use workflows to automatically assign prospects to owners and rotate them in turn to different sales team members randomly.

FILTER#5: Likelyhood to close

This contact based filter is a built in Hubspot filter based on it's own internal algorithm.

Here we want to target prospects who are more likely to close and not waist sales time on less committed prospects.

The example below shows a filter that shows 30 contacts with the likelyhood to close greater than 15%.

These contacts can now be the point of focus for a telephone call or a targeted marketing email.

FILTER#7: Contact Priority

This contact based filter is a built in Hubspot filter based on it's own internal algorithm and is commonly used with the previous Filter#6.(Likelihood to close)

Used by itself this filter shows a contacts priority and ranks each contact's priority from "low" to "very high." Here we are filtering on just contacts that are high or very high. These are ripe for a targeted sales call or email.

If you have a long prospecting list you're trying to prioritize, you could filter the list to only see contacts with a Likelihood to close that's above, say, 50%, and then you could add a column for

FILTER#8: Deal amount

This deal based filter is useful for narrowing down opportunities in your sales pipeline that are worth more money.   In this example we are filtering on deals that are worth more than £200.

Converting on of these deals is worth more to the company. Even better, we recommend adding another filter to this one to narrow down deals that are later in the sales pipeline, as they are likely to be more ready to buy and close. So adding the 'deal stage' and filtering on a specific deal stage.
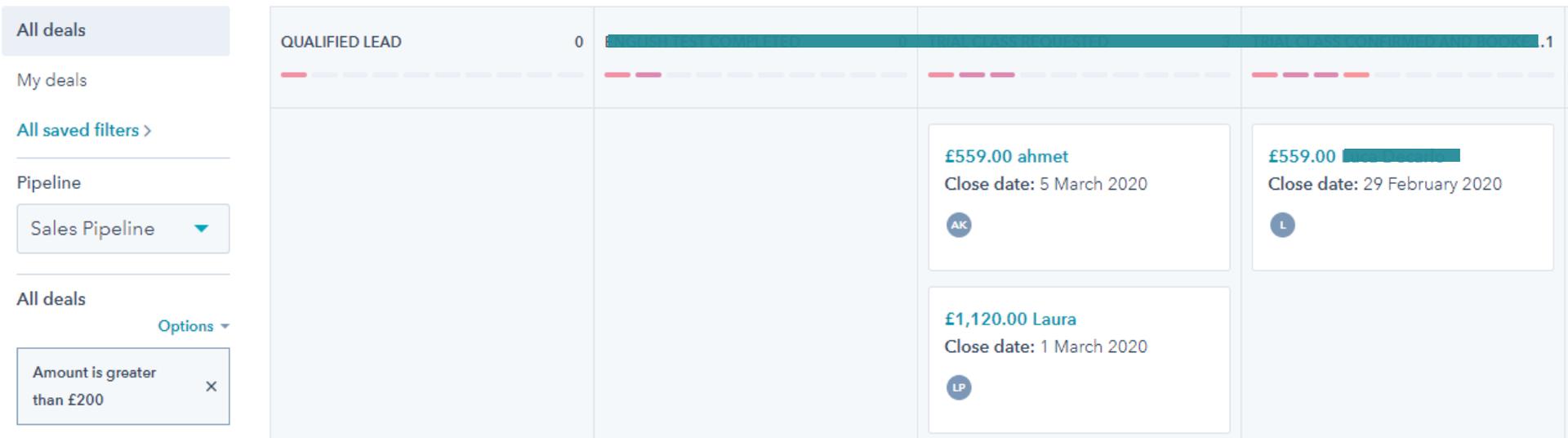
FILTER#9: Last Meeting Booked

If you're using the Meetings tool, your prospects can book time directly on your calendar. To prep for these meetings, you'll want to use the Last meeting booked property.

This property shows the date of the contact's most recently booked meeting. In some cases, this date will be in the future. For example, if I book time on your calendar for tomorrow, tomorrow's date will show in the Last meeting booked property on my contact record.
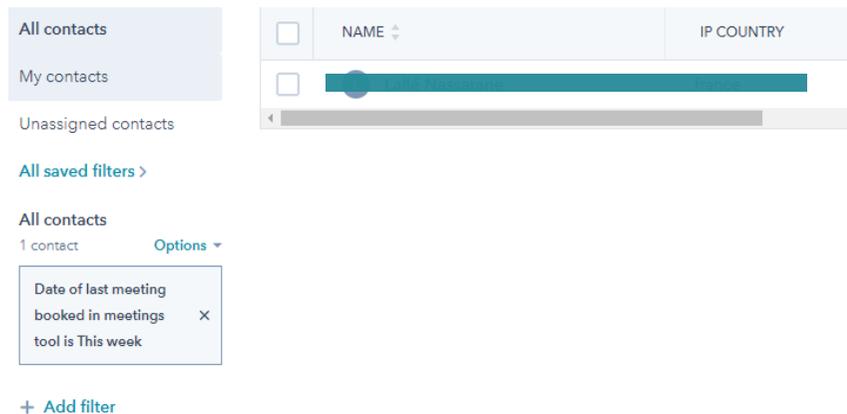
There are a few ways to use this information. At the end of each day, you might filter your contacts to see anyone who's booked a meeting for tomorrow. Take a quick look at each of their records to make sure you're ready to meet with them. Leave yourself a note on their timeline with things you want to discuss during the meeting.

Additionally, if you have a list of contacts you're trying to get meetings with, add a filter for this property and set it to "is unknown." That way, when people book time from you, they'll be removed from the list. Then you can work through the list until it's empty.

FILTER#10: Total No of Sales Emails Clicked

This filter is a custom filter and property that we created for a client who wanted to know how many sales emails a contact had clicked on, so the sales team could target the more active and engaged prospects.

An automated workflow was required to count and increment by 1 everytime a sales email was clicked. It was narrowed down further focusing on contacts that were created just last month.

*Not to be confused with a marketing email, which is actually tracked for No.of clicks.

FILTER#11: Interested after watching a Video

This filter is based on a custom filter and an automated workflow and integration with Wistia Video player platform. After a video is watched , a form pops up asking if they are interested in the services or a call back.

If they answer 'YES', this sets a custom contact property to 'YES'.In this case the custom property is called 'INTERESTED KNOW MORE'

FILTER#12: Now in Sequence

The Now in Sequence property is a True/False property.

If a person is currently enrolled in a Sequence, the property will be True. Otherwise, it'll be False. This is a handy property to add to the lists you use when you enroll contacts in a Sequence.

By adding this property to your filters, you can avoid accidentally trying to enroll contacts into a Sequence when they're already in one.
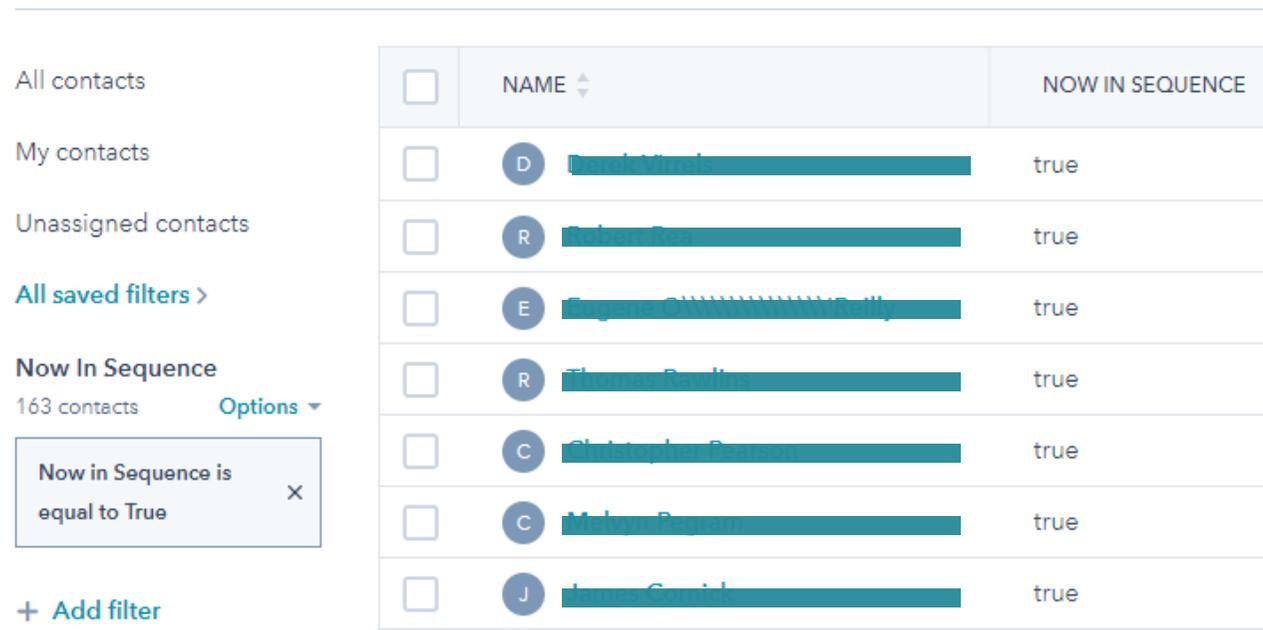
All contacts		NAME ⬍	NOW IN SEQUENCE
My contacts	D	Derek Virrels	true
Unassigned contacts	R	Robert Rea	true
All saved filters >	E	Eugene O\\\\\\\\\\\\\\Reilly	true
Now In Sequence	R	Thomas Rawlins	true
163 contacts Options ▾	C	Christopher Pearson	true
Now in Sequence is equal to True ✕	C	Melvyn Pegram	true
+ Add filter	J	James Corrick	true

FILTER#13: Hubspot score,

Hubspot score is an inbuilt Hubspot property. Lead scoring is the process of assigning values, often in the form of numerical "points," to each lead you generate for the business. You can score your leads based on multiple attributes, including the professional information they've submitted to you and how they've engaged with your website and brand across the internet. This process helps sales and marketing teams prioritise leads.

Hubspot scoring can be configured to score a different points for different actions by the lead, say 10 points for visiting a certain page or 25 points for downloading content, 50 points if they have watched a video to the end or 75 points for filling in a form. For setting a meeting appointment would add 100 to the lead score. Even subtracting 50 points when they unsubscibe from an email list.

NEED HELP# One of our Hubspot consultants can help you setup lead scoring for your organisation.

FILTER#14 & #15: Last Activity Date, and Last Modified Date

These three properties are great for making sure you don't forget about anybody.

Last contacted shows the last time a call, email, or meeting was logged on the person's record.

Last activity date is similar but also looks at notes and tasks, which are internal actions.

Last modified date shows the last time any property on the contact record was modified.

Depending on your sales process, you can use one or a combination of these properties to identify the contacts who are getting neglected. list.

TIP# Use with Filter#2 - Last Contacted

Need some Hubspot Tips?

Contact one of our Hubspot consutlants to see how we can help you get the most out of your Hubspot CRM platform. Arrange a call to discuss today.

Arrange a Call

15 Useful Hubspot Filters

Hubspot Certified Specialists