

🔑 CRM Structure Guidelines

Last Updated: January 2026

Data Model

Object Associations

Pipelines

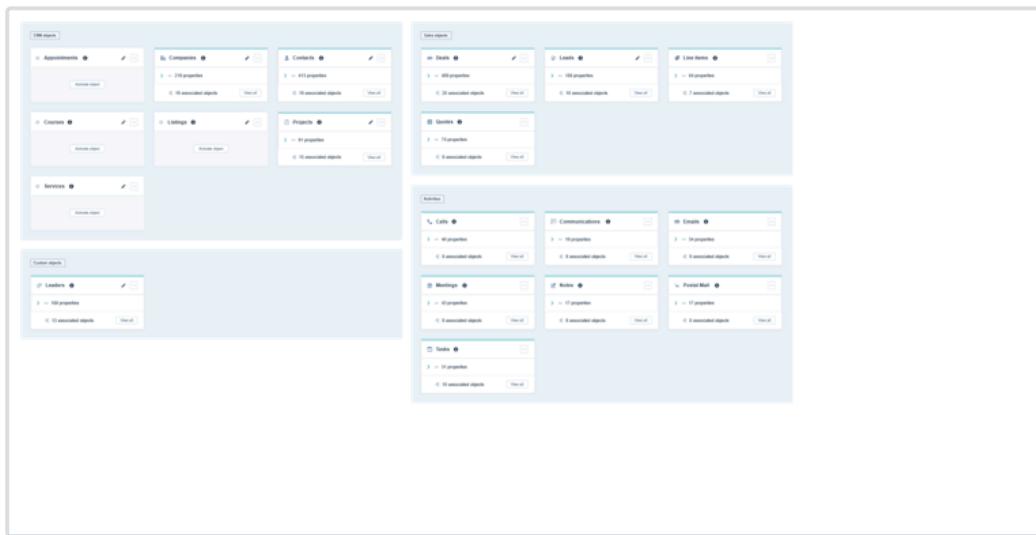
Deal

Lead

Leader

Project

Data Model



Contacts = people

Companies = accounts

Leads = qualification

Deals = money

Line Items = dates & terms

Leaders = lifecycle after money

Object	Records	Properties	Associations
Emails - Log and manage one-to-one email communications between users and contacts.	144,110	34	9
Contacts - Any person who interacts with a HubSpot user's business.	69,988	413	11
Tasks - Assignments or to-do items assigned to a given user.	45,529	31	10
Companies - Any business with interactions related to a HubSpot user's business.	39,191	219	11
Calls - Log data on a single phone or video call.	28,729	40	9
Notes - A generic way to store information about a record alongside other interactions.	14,283	17	9
Meetings - Stores data about in-person and virtual meetings automatically logged by HubSpot or entered manually.	8,384	43	9
SMS - Log data about one-to-one communication between users and	6,024	19	9

customers on SMS, WhatsApp, LinkedIn, postal mail, and custom channels.			
LinkedIn Messages - Log data about one-to-one communication between users and customers on SMS, WhatsApp, LinkedIn, postal mail, and custom channels.	3,270	19	9
<u>Deals</u> - Track progress, ownership, and other details on a transaction with a customer or company.	2,338	489	12
<u>Leads</u> - Tracks progress of associated contact or company through sales qualification. Leads are eventually either qualified or closed.	1,109	186	3
Line items - A specific product or service being sold as part of a single deal, quote, order, or other transaction.	1,009	64	5
<u>Leaders</u> - Represents the leader's name displayed on the PRAY APP. This is used as the official account tracker.	191	160	6
WhatsApp Messages - Log data about one-to-one communication between users and customers on SMS, WhatsApp, LinkedIn, postal mail, and custom channels.	135	19	9
<u>Quotes</u> - Documents outlining proposed or actual line item prices are presented to prospective customers.	131	74	7
Postal Mail - Log a record timeline of postal mail received by the customer.	50	17	8
<u>Projects</u> - An object that is designed for Project Management use cases	33	91	6

Object Associations

Relation	Labels
Companies-to-Companies	<ul style="list-style-type: none"> • Account (Many) → Agency (Many) • Parent Company (1) → Child Company (Many) • Church (Many) → Account (Many) • Church (Many) → Agency (Many) • Church (Many) → Digital Ministry (Many) • Digital Ministry (Many) → Account (Many) • Digital Ministry (Many) → Agency (Many)
Companies-to-Deals	<ul style="list-style-type: none"> • Deal with Primary Company (Many)Primary (1) • Deal (Many)Agency (Many) • Deal (Many)Child (Many) • Deal (Many) Leader (1)
Companies-to-Leaders	<ul style="list-style-type: none"> • Lead with Primary Company (Many)Primary (1)
Contacts-to-Deals	<ul style="list-style-type: none"> • Decision Maker (1)Deals (Many) • Deal (Many)Champion (1) • Deal (Many)Budget Holder (1) • Deal (Many)Billing Contact (Many) • Deal (Many)Key Manager (Many)
Contacts-to-Leaders	<ul style="list-style-type: none"> • Leader (Many)Key Admin (1) • Leader (Many)Billing Contact (1)
Deals-to-Deals	<ul style="list-style-type: none"> • Modifying Deal (Many) Previous Deal (Many)
Leaders-to-Deals	<ul style="list-style-type: none"> • First Closed-Won (1) → Leader (1) • Latest Additional Deal (1) → Leader (1) • Non-contracted (Many) → Leader (Many) • Previous Additional Deal (Many) → Leader (Many)

- Active (1) → Leader (1) (*this will be deactivated and replaced by the Leader-Line Item Association.*)

Pipelines

Deal

Pipelines	Stages
New business New Revenue Negotiation 650 Records	1. Discovery Call Completed (10%) - <i>Deal should start after this</i> 2. Demonstration complete (10%) 3. Solution Scoping Completed (30%) 4. Proposal Sent (50%) 5. Negotiation & Objections (70%) 6. Quote sent for signature (90%) 7. Closed Won (100%) 8. Closed Lost (0%)
Ads and Other 491 Records	1. Qualifying & Discovery (10%) 2. Pitch (30%) 3. Proposal (60%) 4. Contract Sent (90%) 5. Closed Won (100%) 6. Closed Lost (0%)
Agencies 37 Records	1. Prospecting (20%) - <i>Should be a lead, not a deal</i> 2. First Meeting (30%) 3. Client Discussion / Identification (40%) 4. Data Dashboard Deep Dive (70%) 5. Relationship Scoping (80%) 6. Set Client Meetings (90%) 7. Closed Won (100%) 8. Closed Lost (0%)

Retention 189 Records <i>(This will be deactivated and replaced by the Leader-Line Item Association.)</i>	1. Onboarding & Implementation (50%) 2. Active (60%) 3. Renewed (70%) 4. Expanded (50%) 5. Downgraded (50%) 6. Churned – Closed Lost (0%)
Downgrade/Churn 5 Records <i>(This appears not to have been adopted.)</i>	1. Downgrade/Churn Request Received (50%) 2. Discovery & Retention Attempt (60%) 3. Revised Proposal Sent (70%) 4. Final Negotiation & Decision (80%) 5. Quote sent for signature (90%) 6. Closed Won – Retained with no changes (100%) 7. Closed Won – Readjusted Service (100%) 8. Closed lost – Churned (0%)
Government 8 Records	1. Target Account Identified (10%) - <i>Should be a lead, not a deal</i> 2. Initial Outreach / Warm Introduction (20%) - <i>Should be a lead, not a deal</i> 3. Discovery & Use Case Alignment (30%) 4. Internal Champion Identified (50%) 5. Solution Design & Proposal Draft (60%) 6. Legal, Compliance & Procurement Review (70%) 7. Budget Secured / Funding Approved (80%) 8. Final Approval & Contract Execution (90%) 9. Closed Won – Active Government Partner (100%) 10. Implementation / Onboarding (100%) 11. Closed lost (0%)
Ministry (inactive) 958 Records	<i>Must be relocated for the new business pipeline</i>
Old 2 (inactive)	<i>Both Pipelines have no record. Must be deleted</i>

Old 1 (inactive)**Lead**

Pipeline	Stages
Instagram Outreach 669 Records	<ul style="list-style-type: none">• Not Started<ul style="list-style-type: none">◦ Identified• In Progress<ul style="list-style-type: none">◦ Direct Message Sent◦ Direct Message Replied◦ Attempting to Book Meeting• Qualified<ul style="list-style-type: none">◦ Meeting Scheduled• Disqualified<ul style="list-style-type: none">◦ Disqualified
Inbound Marketing 435 Records <i>Needs a clean-up</i>	<ul style="list-style-type: none">• Not Started<ul style="list-style-type: none">◦ New• In Progress<ul style="list-style-type: none">◦ Attempting to connect◦ Attempting to book a meeting◦ Meeting Booked• Qualified<ul style="list-style-type: none">◦ Deal created• Disqualified<ul style="list-style-type: none">◦ Disqualified
PLG Leads 5 Records	<ul style="list-style-type: none">• Not Started<ul style="list-style-type: none">◦ New• In Progress<ul style="list-style-type: none">◦ Attempting◦ Connected• Qualified<ul style="list-style-type: none">◦ Qualified

	<ul style="list-style-type: none"> • Disqualified <ul style="list-style-type: none"> ◦ Disqualified
Marketing-Driven ABM Meetings 0 Records	<ul style="list-style-type: none"> • Not Started <ul style="list-style-type: none"> ◦ Meeting Booked • In Progress <ul style="list-style-type: none"> ◦ Meeting Completed • Qualified <ul style="list-style-type: none"> ◦ Deal created • Disqualified <ul style="list-style-type: none"> ◦ Disqualified
Ads & Others 0 Records	<ul style="list-style-type: none"> • Not Started <ul style="list-style-type: none"> ◦ New • In Progress <ul style="list-style-type: none"> ◦ Attempting ◦ Connected • Qualified <ul style="list-style-type: none"> ◦ Qualified • Disqualified <ul style="list-style-type: none"> ◦ Disqualified

Leader

Pipeline	Stages
Ministry SaaS 164 Records	<ul style="list-style-type: none"> • Open <ul style="list-style-type: none"> ◦ Recent Closed Won ◦ Executive Onboarding ◦ Technical Onboarding ◦ Adoption & Engagement ◦ Red Flags Identified ◦ Dormant User • Closed <ul style="list-style-type: none"> ◦ Churned – Closed Lost

PLG 16 Records <i>Needs a clean-up</i>	<ul style="list-style-type: none"> • Open <ul style="list-style-type: none"> ◦ Active Subscription ◦ Upsell negotiation • Closed <ul style="list-style-type: none"> ◦ Upgraded ◦ Churn
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Project

Pipeline	Stages
SuperFunnel Onboarding & Launch 32 Records	<ul style="list-style-type: none"> • Open <ul style="list-style-type: none"> ◦ Preparing for Onboarding ◦ Executive Onboarding ◦ Preparing Profile & Marketing ◦ Ready to launch ◦ Live (First Week) • Closed <ul style="list-style-type: none"> ◦ First Report Meeting Complete ◦ Cancelled
New Leader Onboarding 1 Record	<ul style="list-style-type: none"> • Open <ul style="list-style-type: none"> ◦ Pre-Onboarding Preparation ◦ Executive Onboarding ◦ PRAYStudio Profile Setup ◦ Launch Execution • Closed <ul style="list-style-type: none"> ◦ Closed - Onboarding Complete ◦ Cancelled ◦