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TIER 1: IDENTITY & CONTACT (Who is this?)

- |— [Key Fields](#)
- |— [Core Info](#)

TIER 2: UNDERSTANDING (What do we know about them?)

- |— [Firmographics](#)
- |— [Growth Signals & Media Presence](#)
- |— [Marketing Segmentation](#)
- |— [Marketing/AI Qualification](#)

TIER 3: SALES PROCESS (Where are they in our funnel?)

- └ Sales Qualification
- └ Lifecycle & Status
- └ Lead Source & Attribution

TIER 4: COMMERCIAL (What's the business relationship?)

- └ Products & Revenue
- └ Customer Success

TIER 5: OPERATIONS (Backend/Internal)

- └ Internal / Ops (Hidden)
- └ Discontinued

Group	Property Type
Key Fields	Name, Domain, LinkedIn
Core Info	Owner, Phone, Address
Firmographics	Revenue, Employees
Growth Signals	Social Followers, Broadcasting
Marketing Segmentation	ICP Tier, Persona, Profile Fit
Sales Qualification	BANT, Pain Points
Lifecycle & Status	Lifecycle, Journey, Lead Status
Products & Revenue	Deal Amount, ACV, Products
Customer Success	Health Score, Onboarding
Lead Source	Campaign, Channel, Source
Internal / Ops	Sync Status, Data Flags
Discontinued	Deprecated Properties

Contacts - Key-Fields

Field Name	Type	Source	Format/Rules

Record ID	Number	CRM Setting	Auto-increment, Read-only
Owner	User	CRM UI/Workflows	Auto-syncs with Company Owner
First Name	Text		
Last Name	Text		
Email	Text		
Valid Email			
LinkedIn URL	URL		
Contact			
Marketing			
Status			
Communication			
Subscriptions			

Contacts - Core Info

Field Name	Type	Source	Format/Rules
Country	Text	Manual, Clay	Example: United States
State/Region	Text	Manual, Enrich	Example: South Carolina
State/Region Code	Text	Manual, Enrich	Example: SC
Postal Code			
City	Text	Manual, Enrich	Example: Winneconne
Street Address			
Create Date			

WhatsApp Phone Number	Number		
Time Zone			
Created by user ID	Number		
Owner assigned date			
LinkedIn Bio			
Mobile Phone Number			
Phone Number			
Updated by user ID			

Contacts -

Firmographics

Field Name	Type	Source	Format/Rules
Job Title			
Job Title (dropdown)			
Work email			
Buying Role	<ul style="list-style-type: none"> • Blocker • Budget Holder • Champion • Decision Maker • End User • Executive Sponsor 		

	<ul style="list-style-type: none"> • Influencer • Legal & Compliance • Key Leader Admin, • Billing Contact • Other 		
Company Name			
Website URL			

Contact - Marketing Segmentation

Field Name	Type	Source	Format/Rules
Persona			

Contact - Marketing/AI Qualification

Field Name	Type	Source	Format/Rules
Budget qualification			
Competitors Mentioned			
Decision Role			
Decision urgency expressed			
Pain Points Mentioned			
Product-market fit assessment			
Purchase intent level			

Company - Key Fields

Field Name	Type	Source	Format/Rules
Record ID	Number	CRM Setting	Auto-increment, Read-only
Owner	User	CRM UI/Workflows	Auto-syncs with Company Owner
Company Domain	Text	Forms/CRM UI/Enrich	Required to create a record
Company Name	Text	Manual, Enrich	Required to create a record
LinkedIn Company Page	URL	Manual, Enrich	Required to create a record
Website URL	URL	Manual, Enrich	
Valid Company Domain	<ul style="list-style-type: none"> • Valid Domain • No domain • Wrong Input 	Enrich	Clay sets whether the company has a valid domain, no domain, or an invalid domain

Company - Core Info

Field Name	Type	Source	Format/Rules
Country	Text	Manual, Enrich	Example: United States
Website URL			
State/Region	Text	Manual, Enrich	Example: South Carolina

State/Region Code	Text	Manual, Enrich	Example: SC
Postal Code			
City	Text	Manual, Enrich	Example: Winneconne
Street Address			
Create Date			
Time Zone			
Created by user ID	Number		
Owner assigned date			
LinkedIn Bio			
Phone Number			
Description	Text	Enrich	
Updated by user ID			
First Contact Create Date			

Company - Firmographics

Field Name	Type	Source	Format/Rules/Examples
Estimated revenue range		Workflow	Feed by Revenue Range and Annual Revenue
Revenue Model	Text	Enrich	

Estimated Employee range	<ul style="list-style-type: none"> • Fewer than 10 • 10 - 29 • 30 - 49 • 50 – 99 • 100 – 199 • 199+ 	Workflow	Feed by number of employees
Number of locations	Number	Enrich	
Denomination	Text	Enrich	
Lead Pastor Name			
Facebook Company Page	Text	Enrich	
Instagram Page Link	Text	Enrich	
YouTube Channel Link	Text	Enrich	
Giving Page URL	Text	Enrich	
RSS feed link for podcast	Text	Enrich	
Podcast Link	Text	Enrich	Merge with Apple podcast link
Apple Podcast Link	Text	Enrich	
Podcast Name	Text	Enrich	
Podcast Host Name	Text	Enrich	
Artist Type	<ul style="list-style-type: none"> • Logo • Person 	Enrich	The type of artist that will be

			displayed in the pray app
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Company - Segmentation

Field Name	Type	Source	Format/Rules/Examples
Company Type	<ul style="list-style-type: none"> • Church • Parachurch organization • Media Ministry • Podcast • Nonprofit • Agency • <u>Broadcasting platform</u> • Media Channel • Social Network • Other 	Manual, Enrich, Workflow	

Company - Growth Signals & Media Presence

Field Name	Type	Source	Format/Rules
Instagram followers	Number	Enrich	Feeds Instagram Followers Range
Instagram Followers Range	<ul style="list-style-type: none"> • 0 - 10K • 10K - 50K • 50K - 100K • 100K + 	Workflow	
Broadcast Channels Names	Text	Enrich	Example: Youtube, Ktbn, Siriusxm Feeds Distribution Channels

Broadcast Channel Types	Text	Enrich	Example: Streaming Platform, Radio Station, Satellite Radio Feeds Distribution Channels
Distribution Channels	<p>Multi-Select Checkboxes:</p> <ul style="list-style-type: none"> • Broadcast radio (terrestrial) • Broadcast TV • Multiple podcast platforms (Apple, Spotify, etc.) • YouTube channel • Streaming platforms (Roku, Apple TV, etc.) • Mobile app • Email/Newsletter audience • Website only • We're just getting started 		
Agency	Drop-Down		
Church size	<ul style="list-style-type: none"> • 0–199 • 200–399 • 400–1,099 • 1,100+ 		Feed by church member count
Content Reach	<ul style="list-style-type: none"> • 100,000+ monthly 		

	<p>listeners/viewer</p> <p>s</p> <ul style="list-style-type: none"> • 25,000-99,999 monthly <p>listeners/viewer</p> <p>s</p> <ul style="list-style-type: none"> • 5,000-24,999 monthly <p>listeners/viewer</p> <p>s</p> <ul style="list-style-type: none"> • Under 5,000 monthly <p>listeners/viewer</p> <p>s</p> <ul style="list-style-type: none"> • Just getting started (pre-launch or early stage) • Agency/service provider serving ministries 	
Content Production Volume	<ul style="list-style-type: none"> • Daily content (radio show, daily podcast, daily devotional) • Weekly content (weekly podcast, weekly video series) • Monthly or occasional content (monthly show, event-based) • Planning our content 	

	<p>strategy.</p> <ul style="list-style-type: none"> • Agency/service provider 		
Growth Intent			
Timeline for Solution	<ul style="list-style-type: none"> • 1-3 months • 3-6 months • 6+ months • Just researching 		Manual Entry
Ad Spent - Last 6 months	Number		
Web Technologies	Text		
Competitive Solutions in Use	Text		
Donations Management tools in use	Text		
CRM tools in use	Text		
CMS tools in use	Text		
Email tools in use	Text		
Analytics tools in use	Text		

Leads - Key Fields

Deals - Key-Fields

Field Name	Object	Type	Source	Format/Rules
Record ID	All	Number	CRM Setting	Auto-increment, Read-only
Owner	All	User	CRM UI/Workflows	Auto-syncs with Company Owner
First Name	Contact	Text		
Last Name	Contact	Text		
Email	Contact	Text		
Valid Email	Contact			
LinkedIn URL	Contact	URL		
Company Domain	Company	Text	Forms/CRM UI/Enrich	Required to create a record
Company Name	Company	Text	Manual, Enrich	Required to create a record
LinkedIn Company Page	Company	URL	Manual, Enrich	Required to create a record
Website URL	Company	URL	Manual, Enrich	
Valid Company Domain	Company	<ul style="list-style-type: none"> • Valid Domain • No domain • Wrong Input 	Enrich	Clay sets whether the company has a valid domain, no domain, or an invalid domain

Contact Marketing Status	Contact			
Communication Subscription S	Contact			
Deal Name	Deal			
Deal Type	Deal			
Leader Name	Leader			app display name
Ministry Name	Leader			
Leader Domain	Leader			

Deal - Core Info

Field Name	Object	Type	Source	Format/Rules
Close Date	Deal			
Deal Collaborator	Deal			
Deal Description	Deal			
Deal History Label	Deal			
Deal owner	Deal			
Deal Split Users	Deal			
Deal Stage	Deal			

Deal Type	Deal			
Pipeline	Deal			
Customer success manager (CSM)	Leader			
Date became a Leader	Leader	Sync		
Leader PRAY.COM URL	Leader			
Owner	Leader	HubSpot user		
Owner assigned date	Leader			
Owner's main team	Leader			

Leader - Key Fields

Field Name	Object	Type	Source	Format/Rules
Leader Name	Leader			app display name
Ministry Name	Leader			
Leader Domain	Leader			

Leader - Core Info

Field Name	Object	Type	Source	Format/Rules
Customer success manager (CSM)	Leader			
Date became a Leader	Leader	Sync		
Leader PRAY.COM	Leader			
URL				
Owner	Leader	HubSpot user		
Owner assigned date	Leader			
Owner's main team	Leader			

Control Property Creation (Governance)

Best-in-class teams:

- Restrict property creation to **RevOps**
- Require:
 - Owner
 - Description
 - Reporting use case
 - Object justification

Create a simple internal rule:

“No property without a dashboard.”

Automate to Prevent Data Drift

Use workflows to:

- Sync Company → Contact (e.g., Industry, ICP Tier)
- Set defaults on Deal creation.
- Lock properties after certain stages
- Timestamp lifecycle changes

This keeps data **consistent without relying on humans**.

Documentation & Visibility

Every important property should have:

- Description filled out
- Expected values explained
- “Who updates this?” defined

HubSpot descriptions are underrated—use them aggressively.

Periodic Cleanup

Run audits for:

- Unused properties
- Free-text fields that should be dropdown
- Duplicate concepts
- Broken workflows

Archive aggressively—HubSpot performance improves with fewer properties.

Data Entry Standards

Global Standards

Phone Numbers

- **Format:** +1-XXX-XXX-XXXX (US/Canada)
- **International:** +[Country Code]-[Number]
- **Validation:** Must be 10 digits (US) or valid international format

Email Addresses

- **Format:** lowercase@domain.com

- **Validation:** Must contain @ and valid domain
- **Duplicates:** System prevents duplicate primary emails

Currency

- **Format:** \$X,XXX,XXX.XX
- **Currency:** USD default, specify if other
- **Validation:** Numbers only, no negative values

Dates

- **Format:** MM/DD/YYYY
- **Time:** HH:MM AM/PM (12-hour) or HH:MM (24-hour)
- **Timezone:** All times in account timezone

Names

- **Capitalization:** Proper case (John Smith)
- **Special Characters:** Allow hyphens, apostrophes
- **Validation:** No numbers, 2-50 characters

URLs

- **Format:** Must include https:// or http://
- **Validation:** Valid domain structure

Required Field Combinations

Different record types require different field combinations:

B2B Contacts:

- First Name + Last Name + Email + Company Name + Job Title

B2C Contacts:

- First Name + Last Name + (Email OR Phone)

Companies:

- Company Name + (Website OR Domain) + Industry

Deals:

- Deal Name + Amount + Close Date + Stage + Deal Type

Related Documentation

- [Property Cheat Sheet](#)
- [Lead velocity metrics](#)

Deal Name + Amount + Close Date + Stage + Deal Type