

Default Required + Optional Properties (Contacts and Deals)

A vendor-neutral starting set of CRM properties for B2B SDR work. Use it as the default if you don't have a team-agreed equivalent.

The chapter's first hygiene rule (*Required fields complete*) refers to the fields below as the "fields your team agreed are mandatory." This file makes those fields concrete.

HubSpot Free limits you to 10 custom properties per object. The bold properties in the table below are HubSpot defaults and don't count against the cap; if you stay close to this default set, you'll have headroom. If your team's required list adds more than ~10 truly custom fields, you'll need Starter or Pro to expand the cap to 1,000.

Contact properties

Required (every contact must have these)

Property	Type	Purpose
Email	Email	Primary identifier — must be unique. The CRM uses email to detect duplicate contacts.
First name	Single-line text	Personalization in outreach; basic identification.
Last name	Single-line text	Identification; deduplication tiebreaker.
Company	Single-line text or association to Company record	Aggregates contacts at the same prospect organization. Strongly preferred to be an <i>association</i> to a Company record rather than a free-text field, where the CRM supports it.
Owner	User picker	The SDR responsible for the contact. Orphan contacts (no owner) are a hygiene defect.
Lifecycle stage	Dropdown (e.g., <i>Lead</i> / <i>Qualified Lead</i> / <i>Sales</i>)	Tells you where the contact sits in the funnel, independent of any specific deal.

*Opportunity / Customer
/ Other)*

Lead source	Dropdown (e.g., <i>Inbound web / Outbound prospecting / Referral / Event / Partner / Other)</i>	Required for any conversion-attribution analysis.
-------------	----------------------------------------------------------------------------------------------------------------	---------------------------------------------------

Optional but commonly useful

Property	Type	Purpose
Phone number	Phone	For outbound calls; not always available.
Job title	Single-line text	Helps with personalization and qualification.
LinkedIn URL	URL	Useful for prospect research; standard SDR field.
Country / Region	Dropdown	Required if your team operates in multiple regions or has different processes by region.
GDPR / data-consent flag	Checkbox or dropdown	Required if you operate under GDPR (EU/EEA), CCPA (California), or any equivalent data-protection regime. Optional only if you operate exclusively in jurisdictions with no equivalent regulation.

Deal properties

Required (every deal must have these)

Property	Type	Purpose
Deal name	Single-line text	Human-readable label. Convention: <i>[Company]</i> — <i>[opportunity in 3-5 words]</i> , e.g., "Northwind Co. — Q3 brand refresh".
Pipeline	Pipeline picker	Which pipeline the deal sits in (HubSpot Free has only one deal pipeline; multi-pipeline CRMs require this field).

Stage	Stage picker	One of the active or terminal stages defined in "Pipeline and Stages". Must match the evidence rules in that file.
Amount	Currency	The expected revenue value. Blank amounts are a hygiene defect — either fill with a scoped estimate or demote the deal stage until you have one.
Close date	Date	Expected close date. Used by every quarterly / monthly pipeline report.
Owner	User picker	The SDR responsible. Orphan deals are a hygiene defect.
Primary contact	Association to Contact record	Every deal links to at least one contact. Deals without contacts are unsupportable.
Next step	Single-line text or rich text	What the SDR will do next on this deal, with a date. The single most predictive signal of whether a deal is alive.
Last activity date	Date (auto-tracked in most CRMs)	Drives the <i>recency</i> hygiene rule. Stale deals (e.g., > 14 days for active stages) are flagged.

Required only on Closed Lost

Property	Type	Purpose
Closed-lost reason	Dropdown (e.g., <i>Price / No decision / Lost to competitor / Bad fit / Budget cut / Other</i>)	Required so post-mortem analysis is possible. Without it, <i>Closed Lost</i> deals are noise.

Optional but commonly useful

Property	Type	Purpose
Probability	Number (%)	Often auto-derived from stage; useful if your team weights pipeline value by stage probability.
Deal type	Dropdown (e.g., <i>New business / Expansion / Renewal</i>)	Distinguishes net-new revenue from existing-customer revenue.
Source	Dropdown (matches <i>Lead source</i> on contact)	Useful when a deal originates differently from the primary contact.

Expected MRR / ACV	Currency	For subscription-business pipelines, often more meaningful than one-time <i>Amount</i> .
-----------------------	----------	------------------------------------------------------------------------------------------------

How to create these properties

CRM	Where to create
HubSpot Free	<i>Settings → Properties → select Contacts or Deals → Create property.</i> Create each one manually before importing data — HubSpot Free does not allow bulk creation of custom properties from a CSV import. The CSV import only maps to properties that already exist.
Salesforce	<i>Setup → Object Manager → Contact (or Opportunity) → Fields & Relationships → New.</i>
Pipedrive	<i>Settings → Personal preferences → (or Company settings) → Custom fields.</i>
Zoho CRM	<i>Setup → Customization → Modules → Contacts (or Deals) → Layout → drag in Custom Field.</i>

Why this list and not a longer one

CRM property bloat is a real cost: every additional required field is a friction point at data entry, and orphan optional fields rot into noise. This list is the **minimum viable** set for an SDR running a credible pipeline. Add fields only when a hygiene rule, a report, or a workflow genuinely depends on them.