The background features a white central area with rounded corners, surrounded by abstract, overlapping shapes in shades of red, orange, and teal. The shapes are semi-circular and rectangular, creating a modern, geometric aesthetic.

# **The Self-Generating CRM: Conversational Enrichment**

**Colin Gillingham | September 5, 2025**

# Colin Gillingham

Group Product Manager,  
HubSpot



The slide features three large, overlapping circles with a radial gradient from red to teal. One circle is in the top right, another in the bottom left, and a third in the bottom right. The text is centered in the white space between them.

**Enrichment = Context**

“I really like the term **context engineering** over prompt engineering...”

Andrej Karpathy

# Lead Scoring

## Lead Scoring

A method of ranking prospects based on how likely they are to become customers, using company data, contact details, and website behavior.

Example:

**Industry:** Computer Software (+10)

**Employee Count:** 200–500 (+10)

**Job Title:** VP of Sales (+20)

**City:** San Francisco, CA (+5)

✓ Sales-ready lead > 30

# Lead Routing

## Lead Routing

A method of automatically assigning incoming leads to the right sales rep or team based on predefined rules, ensuring faster follow-up and better conversion.

Example:

**Industry:** Healthcare →

Assigned to Healthcare Specialist Team

**Employee Count:** 1,000+ employees →

Assigned to Strategic Accounts Team

**State:** New York →

Assigned to Rep covering NE territory

# Segmentation

## Segmentation

The process of grouping contacts or companies into targeted lists based on shared attributes, enabling more targeted outreach.

Example:

**Industry:** Computer Software

**Annual Revenue:** \$10M-\$50M

**Employee Count:** 51-200

Result: Segment contains 1,250 companies matching these criteria.

# Personalization

## Personalization

Tailoring messaging to a prospect or customer using their specific attributes to increase engagement and conversion.

Example:

**First Name:** Sarah

**Industry:** Healthcare

**Job Title:** Director of Operations

Result: Sends an email with subject line

“Sarah, see how we help Healthcare operations teams cut costs”

# LLMs & Agents

## LLMs & Agents

Enhance AI workflows like sales/marketing content generation, deal intelligence, buyer personas, and RAG-based segmentation with enrichment data.

Example:

**Lead:** Healthcare CIO, \$500M enterprise, mid-deal stage, viewed security compliance page.

**Result:** Tailored proposal with HIPAA features, healthcare case studies, and invite to security webinar.

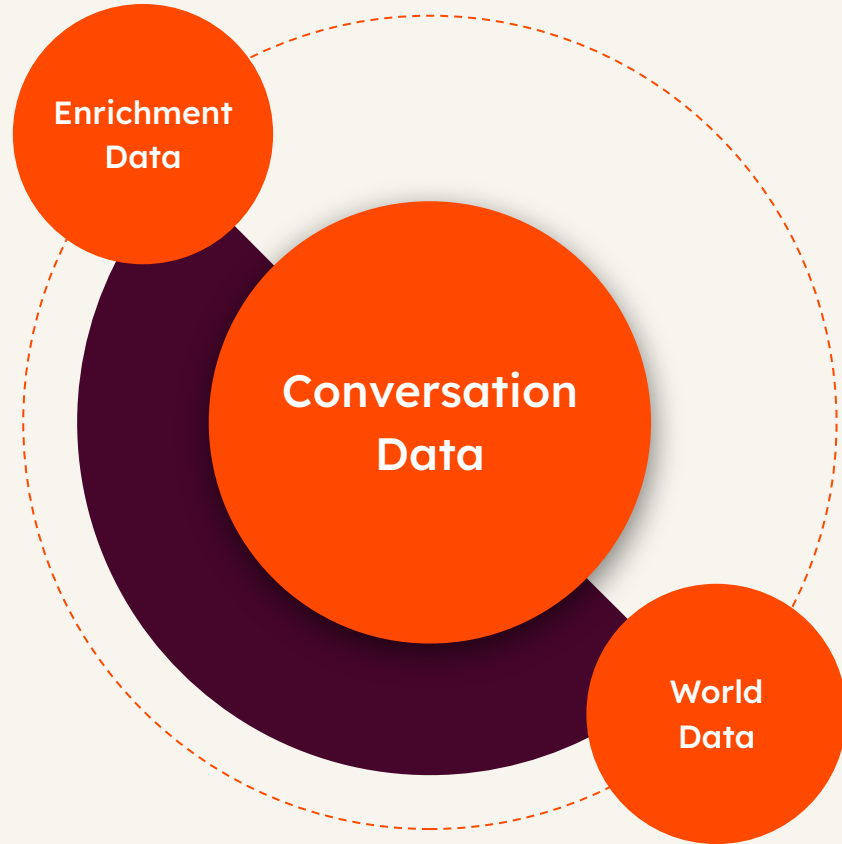
The slide features three large, overlapping circles with a radial gradient. One circle on the left transitions from red to light blue. Another on the right transitions from dark red to teal. A third, partially visible on the far right, transitions from dark red to teal. The text is centered in a bold, black, sans-serif font.

# The modern enrichment stack

“More than 85 % of all business information exists in these forms [unstructured], yet organizations often don’t use it.”

**Merrill Lynch**

# Modern Enrichment Stack



# Enrichment Data

First-party + third-party structured data that provides a factual profile of companies and contacts.

**Company:** Industry, Annual Revenue, Employee Count, HQ Location, Tech Stack

**Contact:** Job Title, Seniority, Department, Role in Buying Process

**Purpose:**

Creates a reliable, structured foundation for scoring, routing, segmentation, personalization, and AI prompts.

# Company Dataset

Company	Industry	Annual Revenue	Employee Count	HQ Location
Nimbus Analytics	Computer Software	\$25M-\$50M	200-500	Boston, MA
Acme HealthTech	Healthcare	\$100M-\$250M	1,000-5,000	Chicago, IL
Stellar Manufacturing	Industrial Automation	\$50M-\$100M	500-1,000	Austin, TX

# Contact Dataset

Contact	Job Title	Seniority	Department	Buying Role
Sarah Thompson	VP of Sales	VP	Sales	Decision Maker
David Chen	Director of IT	Director	IT	Technical Evaluator
Priya Nair	Marketing Manager	Manager	Marketing	Influencer

# Conversation Data

Insights extracted from conversations and other unstructured data in your CRM like sales emails, call transcripts, support tickets and attachments.

**Examples:**

- Buying intent signals
- New contacts or stakeholders
- Product interest and objections
- Key dates and timelines

**Purpose:**

Adds real-time, context-rich details that static enrichment can't provide.

# Email Conversations

Contact	Mentioned Competitors	Pricing Discussion	Product of Interest	Return to Office
Sarah Thompson	Monday.com	Yes	CRM Suite	2025-08-05
David Chen	HubSpot	No	API Gateway	2025-08-02
Priya Nair	Adobe	Yes	Marketing Hub	2025-08-04

# Call Transcripts

Contact	Pain Point	Decision Maker	Follow-up Request	Follow-up Date
Sarah Thompson	HIPAA compliance	Yes	Send compliance docs	2025-08-01
David Chen	Integration delays	Yes	Schedule tech workshop	2025-08-03
Priya Nair	Campaign ROI tracking	No	Share case study	2025-08-06

# Support Tickets

Contact	Issue Summary	Priority	Product Area	Status
Sarah Thompson	API not returning data	High	API Gateway	Open
David Chen	Login authentication error	Medium	Security	Resolved
Priya Nair	Report export failure	Low	Analytics	In Progress

# Document Attachments

Contact	Signer Role	Job Title	Company	Document Type
Sarah Thompson	CFO	VP of Sales	Nimbus Analytics	Proposal
David Chen	CTO	Director of IT	Acme HealthTech	Contract
Priya Nair	CMO	Marketing Manager	Stellar Manufacturing	NDA

# World Data

World Data is custom, external, and time-sensitive information that standard enrichment misses, enabling precise targeting for niche markets. It can include market news, hiring trends, and event participation.

**Examples:**

A manufacturer's ISO certification status  
Hospitals using a specific medical device  
SaaS companies actively hiring DevOps

**Purpose:**

Provides niche-specific firmographic and market context to cover remaining enrichment gaps and needs.

# Agentic Search

Company	Funding Event	Job Posting	Industry Event	HQ Location
Nimbus Analytics	Raised \$50M Series C	Hiring DevOps Engineers	SaaStr Annual 2025	Boston, MA
Acme HealthTech	Acquired by MedTech Corp	Hiring Compliance Officers	HIMSS 2025	Chicago, IL
Stellar Manufacturing	Opened EU Office	Hiring Supply Chain Analysts	Hannover Messe	Austin, TX

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**So long, data entry**

Save time, reduce errors

# Automagically

**01**

**Works 24/7** — Enrichment systems continuously update records from structured, unstructured, and external data sources without manual effort.

**02**

**Clear Traceability** — Every enriched value is linked to its source, ensuring confidence in data accuracy and compliance.

**03**

**Time & Accuracy Boost** — Eliminates repetitive data entry, frees sales teams to focus on selling, and captures insights from unstructured data that would otherwise be lost.

The slide features two large, semi-transparent gradient circles. One is on the left, transitioning from red at the top to light blue at the bottom. The other is on the right, transitioning from dark red at the top to dark teal at the bottom. The main title is centered in a bold, black, sans-serif font.

# Self-Generating CRM Checklist

## Self-Generating CRM Checklist

- 01 Structured Company Data** – Accurate firmographics like industry, revenue, employee count, and HQ location. (HubSpot Company Enrichment)
- 02 Structured Contact Data** – Verified job titles, seniority, department, and buying role. (HubSpot Contact Enrichment)
- 03 Unstructured Data Capture** – Extract insights from emails, call transcripts, and meeting notes. (HubSpot Conversational Enrichment)
- 04 External, World Data** – Bring in industry-specific, time-sensitive, or competitive intel. (HubSpot Data Agent)
- 05 Automated, 24/7 Updates** – Ensure all records refresh continuously with full traceability. (HubSpot automatic enrichment settings)
- 06 Actionable AI/LLM Integration** – Feed enrichment data into AI tools for scoring, routing, personalization, and recommendations. (Breeze Agents)

The future of CRM is rich,  
accurate, and  
**self-generating.**

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