

HUBSPOT CRM & SALES OPERATIONS SYSTEM

SAMPLE/ DEMO PORTFOLIO PROJECT

Northstar Business Consulting

Project Type: Self-Directed Portfolio Project / CRM Simulation

Industry: Business Consulting & Professional Services

Role: CRM & Operations Support

Primary Tool: HubSpot CRM

PROJECT OVERVIEW

I designed and configured a practical HubSpot CRM system for a fictional consulting company, Northstar Business Consulting, to demonstrate how I would organize customer information, manage sales opportunities, track follow-ups, and support day-to-day business operations.

The project focused on creating a structured CRM environment where contacts, companies, deals, activities, tasks, and sales information could be managed from one central system.

THE BUSINESS CHALLENGE

A growing consulting business can quickly become difficult to manage when customer information, sales opportunities, follow-ups, and activities are scattered across different spreadsheets, emails, and notes.

The goal of this project was to create a centralized CRM workflow that would help the business:

- Keep customer and company information organized
- Track prospects through the sales process
- Monitor follow-ups and outstanding activities
- Associate contacts with the correct companies and deals
- Segment contacts based on their status and area of expertise
- Track sales activity
- Give management a clearer view of the sales pipeline

WHAT I BUILT

1. Contact Management System

I created and organized sample CRM contacts with structured information including:

- **Contact details**
- **Lead status**
- **Role**
- **Years of experience**
- **Expertise area**
- **Last interaction date**
- **Company association**
- **Data-processing/legal-basis information**

This created a consistent structure for storing and managing contact information

2. Company Records

I created company records and connected them to their respective contacts.

Company information included:

- **Company name**
- **Industry**
- **Location**
- **Company size**
- **Number of employees**
- **Annual revenue**
- **Industry focus**
- **Engagement type**
- **Partnership status**
- **Description**

This demonstrated how client and company information can be kept connected rather than stored separately.

3. Custom CRM Properties

I configured custom properties to capture information that would be useful for the consulting business beyond standard CRM fields.

Examples included:

- **Lead Status**
- **Role**
- **Years of Experience**
- **Expertise Area**
- **Last Interaction Date**
- **Legal Basis for Processing Contacts Data**

This helped make the CRM more relevant to the company's workflow.

4. Sales Pipeline

I created a structured deal pipeline to represent the consulting company's sales process.

The pipeline stages were:

Initial Contact → Needs Assessment → Proposal Sent → Negotiation → Closed Won / Closed Lost

This provided a visual way to monitor opportunities and understand where each prospect was within the sales process

5. Deal & Contact Associations

I connected deals with the appropriate contacts and companies so that customer relationships could be viewed within the same CRM record.

This demonstrated how CRM data can be organized around the complete customer relationship rather than isolated records.

6. Task Management

I created sample operational and follow-up tasks with:

- **Task titles**
- **Due dates**
- **Priority levels**
- **Associated contacts**
- **Associated companies**
- **Task notes**
- **Assigned owner**

This created a simple follow-up system for making sure important customer activities were not forgotten.

7. Meetings & Call Activity

I also configured sample customer interactions, including meetings and calls.

Examples included:

- **Bookkeeping consultation**
- **Operations needs assessment**
- **Proposal review**
- **Customer follow-up calls**
- **Negotiation follow-up**

This demonstrated how customer interactions can be documented directly inside a CRM.

8. Contact Segmentation

I created CRM segments to make it easier to identify groups of contacts.

The segments included:

- **Active Clients**
- **Contacts classified as customers.**
- **New Leads**
- **Contacts classified as leads.**
- **Consulting & Professional Services**

**Contacts associated with relevant expertise areas such as Management Consulting and Business Coaching.
This demonstrated how segmentation can support targeted follow-up and better CRM organization.**

9. Sales Reporting & Dashboard

I configured sales reports to provide a higher-level view of CRM activity.

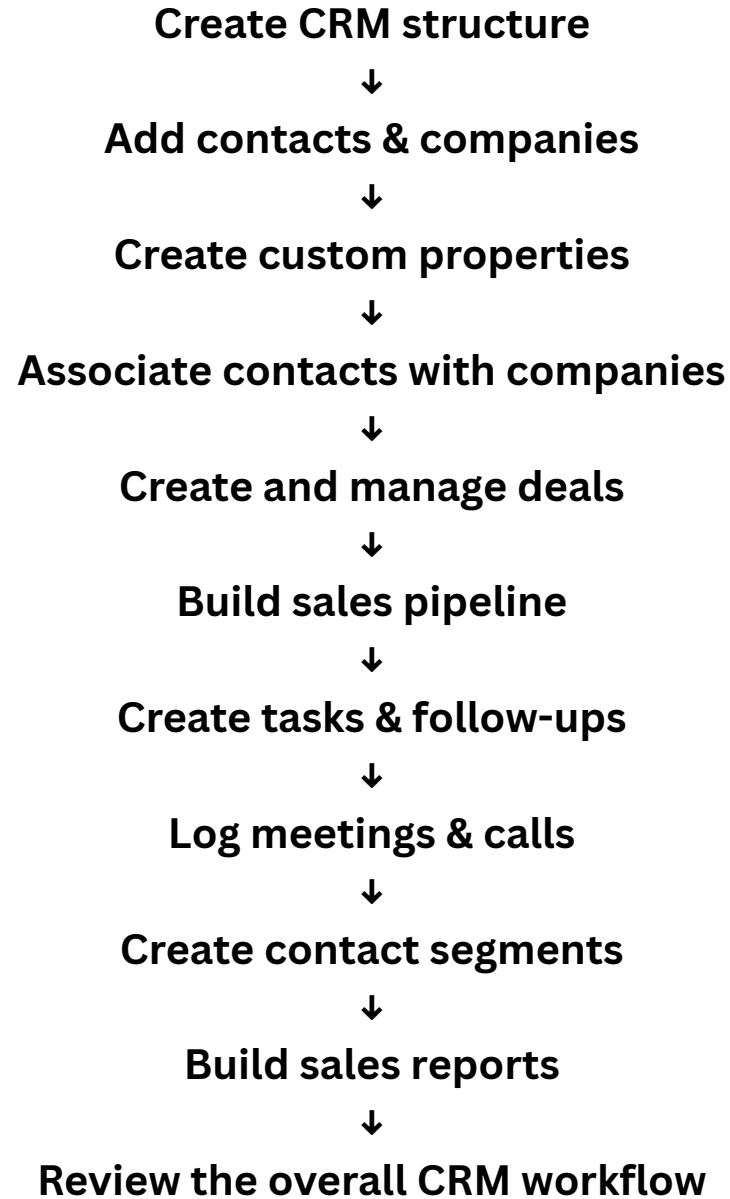
The dashboard included reporting around:

- **Team activities**
- **Contacts created/worked**
- **Deals created**
- **Deals won**
- **Team activity totals**
- **Deals closed compared with goals**
- **Sales forecast by deal stage**

The purpose was to turn CRM data into information that could support management decisions.

MY WORKFLOW

The workflow I followed was:



This created a connected system rather than a collection of unrelated CRM records.

TOOLS USED

HubSpot CRM

SKILLS DEMONSTRATED

Through this project, I demonstrated practical skills in:

- **CRM setup and organization**
- **Contact management**
- **Company data management**
- **Sales pipeline management**
- **Deal tracking**
- **Data organization**
- **Customer follow-up**
- **Task management**
- **Meeting and call logging**
- **CRM segmentation**
- **Sales reporting**
- **Administrative operations**
- **Business process organization**

OUTCOME

The completed CRM simulation provides a centralized system for managing customer information, companies, sales opportunities, activities, tasks, and reporting.

More importantly, the project allowed me to practice using HubSpot from an operations and executive support perspective, rather than simply learning individual CRM features.

It demonstrates my ability to take a business workflow, translate it into a structured CRM system, maintain organized records, and create processes that make follow-up and reporting easier.

☆ CRM Data Overview ▾

Explore reports

Create dashboard

Actions ▾

Share ▾

Quick filters

Owners ▾

Date range ▾

Advanced filters

New Contacts Created ⓘ



This entire month Compared To | Last month

(COUNT) CONTACTS

15

Contacts Added Over Time ⓘ



This entire month | Monthly

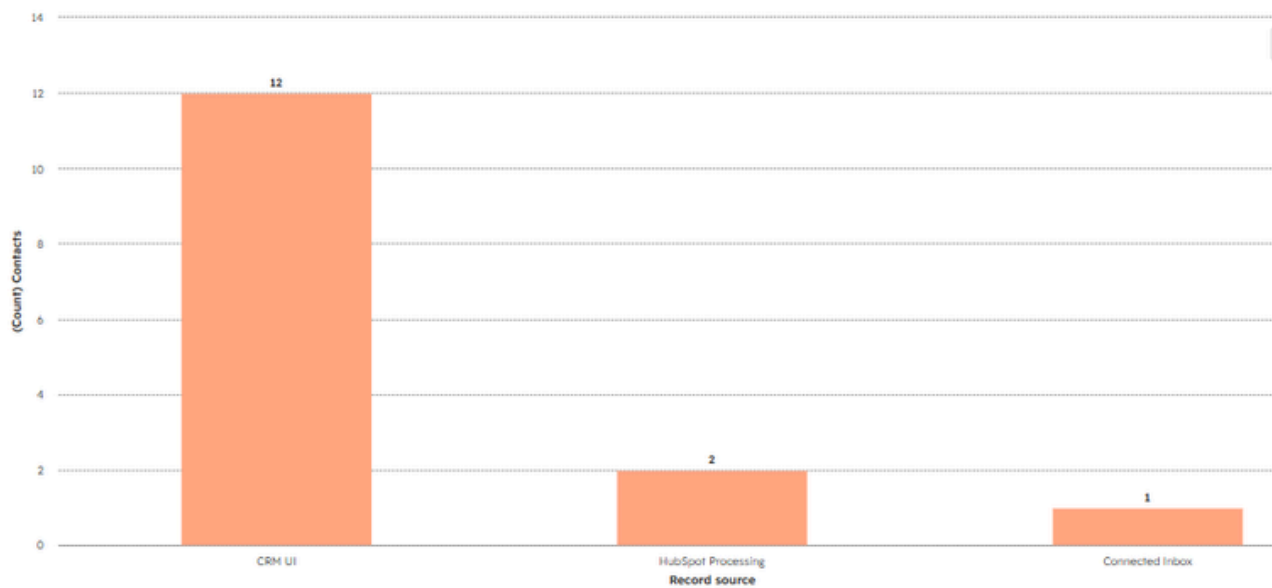
(Count) Contacts

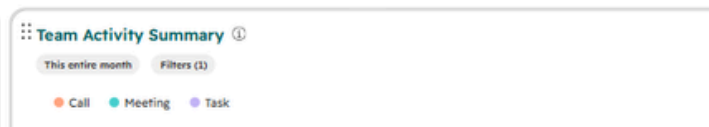
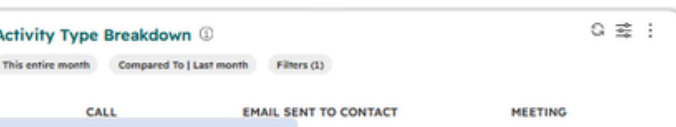
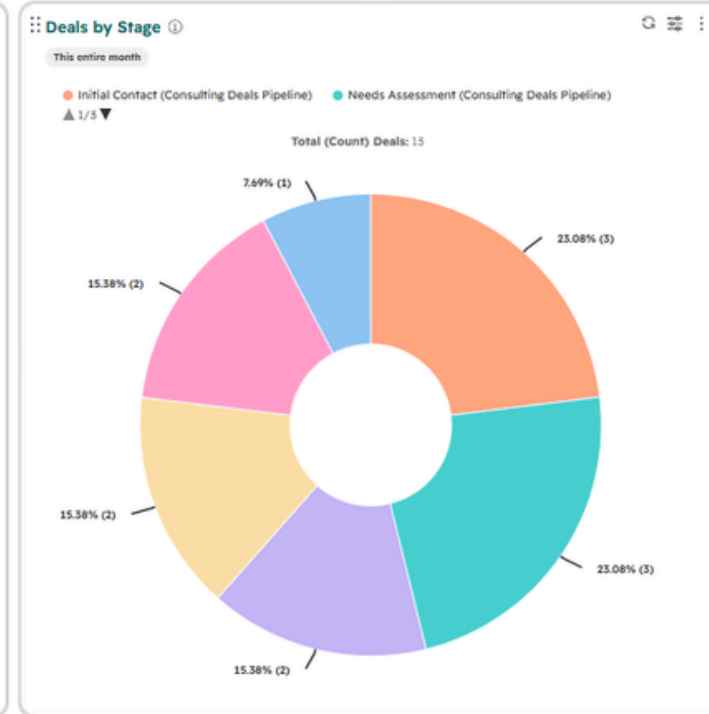
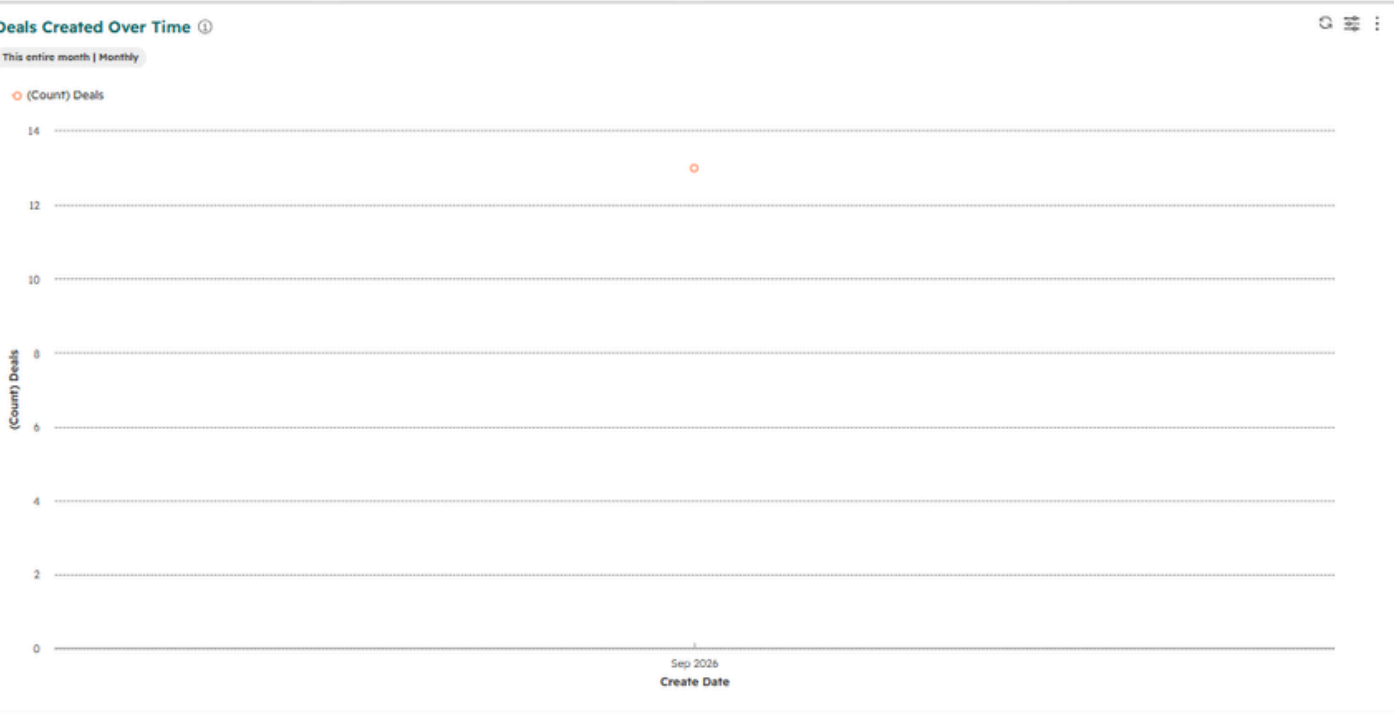


Contact Sources ⓘ

This entire month

(Count) Contacts





Activate Windows
Go to Settings to activate Windows

0 Sep 2025
Create Date

15.38% (2)

Activity Type Breakdown



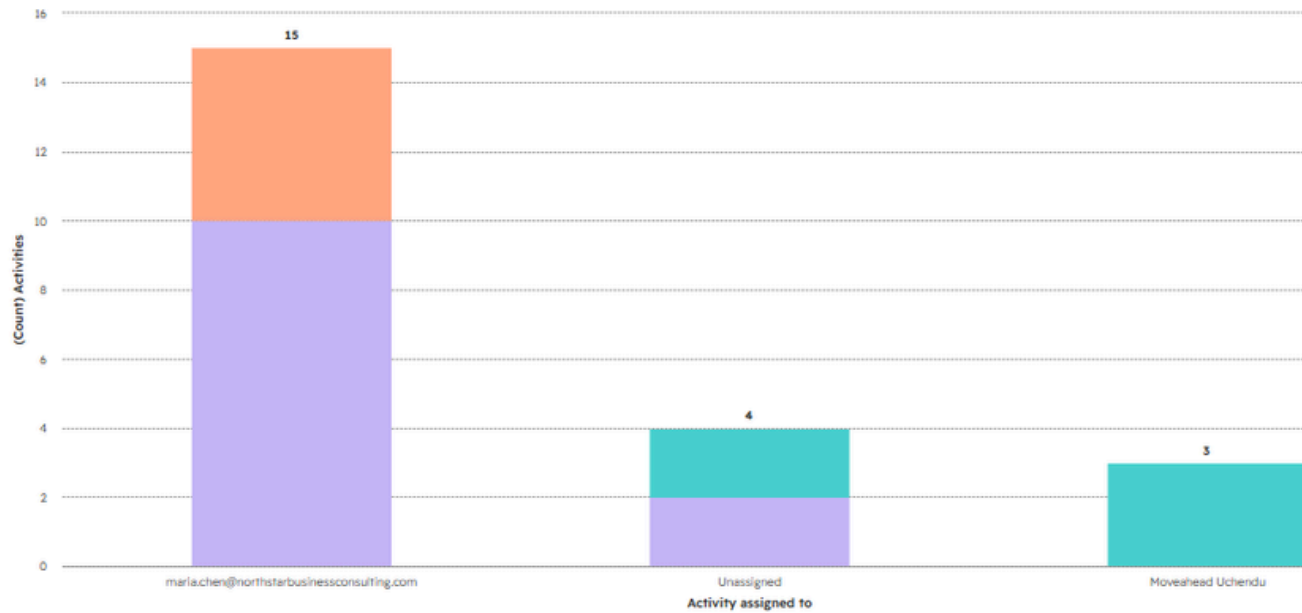
This entire month Compared To | Last month Filters (1)

CALL	EMAIL SENT TO CONTACT	MEETING
5	2	5
TASK		
12		

Team Activity Summary

This entire month Filters (1)

● Call ● Meeting ● Task



Companies ▾

All companies

My companies +

Search (/) 🔍

Filter

Sort by

Company owner ▾

Create date ▾

Last activity date ▾

Lead status ▾

+ 🔗 ⚙️

Advanced filters

1

Path Nonprofit

7M

07/2026

on-Profit Organization Management

maria.chen@northstarbusinessconsulti

🔍 | 📅 in 12 days

3

EduSpark Academy

\$29M

09/07/2026

Education Management

maria.chen@northstarbusinessconsulti

🔍 | 📅 in 12 days

Meridian Consulting

\$4

09/07/2026

Management Consulting

maria.chen@northstarbusinessconsulti

🔍 | 📅 No upcoming

Vantage SaaS Group

\$6.8M

09/07/2026

Computer Software

maria.chen@northstarbusinessconsulti

🔍 | 📅 in a day

2

Willow Health Clinic

\$4.2M

09/07/2026

Medical Practice

maria.chen@northstarbusinessconsulti

🔍 | 📅 in 17 hours

Atlas Logistics

\$12.5M

09/07/2026

Logistics and Supply Chain

maria.chen@northstarbusinessconsulti

🔍 | 📅 in 12 days

2

Ridgeview Realty

\$5.1M

09/07/2026

Real Estate

maria.chen@northstarbusinessconsulti

🔍 | 📅 in 5 days

Pulse Commerce

\$9.5M

09/07/2026

Logistics and Supply Chain

maria.chen@northstarbusinessconsulti

🔍 | 📅 in 5 days

2

BruntWork

09/05/2026

Moveahead Uchendu

🔍 | 📅 5 minutes ago | ⓘ

Harlow Legal Partners

\$54M

09/07/2026

Law Practice

maria.chen@northstarbusinessconsulti

🔍 | 📅 in 5 days

2

IronCore Fitness

\$1.2M

09/07/2026

Health, Wellness and Fitness

maria.chen@northstarbusinessconsulti

🔍 | 📅 No upcoming

HubSpot

09/05/2026

Moveahead Uchendu

🔍 | 📅 19 hours ago | ⓘ

1

Coach Elena Marks

\$850,000

09/07/2026

Professional Training & Coaching

maria.chen@northstarbusinessconsulti

🔍 | 📅 7 hours ago | ⓘ

Contacts ▾

📁 All contacts 📁 My contacts 📁 Unassigned contacts +

Search (/) 🔍

🔼 Filter

🔼 Sort by

Contact owner ▾ Create date ▾ Last activity date ▾ Lead status ▾ (+) (🔗) ⚙️ Advanced filters

Subscriber 1

Nathan Green

✉ nathan.green.northstar@gmail.co... 🔗

📧 maria.chen@northstarbusinessconsulti

🔗 ⚙️ — | ⌚ in 12 days

Lead 2

applications@bruntwork.co

✉ applications@bruntwork.co 🔗

📧 Moveahead Uchendu

🔗 ⚙️ ⌚ 2 minutes ago | ⓘ

Maria Johnson (Sample Contact)

✉ emailmaria@hubspot.com 🔗

📧 Moveahead Uchendu

🔗 ⚙️ ⌚ 4 days ago | ⓘ

Marketing Qualified Lead 2

Olivia Harris

✉ olivia.harris.northstar@gmail.com 🔗

📧 maria.chen@northstarbusinessconsulti

🔗 ⚙️ — | ⌚ in 5 days

Robert Adams

✉ robert.adams.northstar@gmail.c... 🔗

📧 maria.chen@northstarbusinessconsulti

🔗 ⚙️ — | ⌚ in 12 days

Sales Qualified Lead 2

Daniel Brooks

✉ daniel.brooks.northstar@gmail.c... 🔗

📧 maria.chen@northstarbusinessconsulti

🔗 ⚙️ ⌚ in 5 days

Rachel Anderson

✉ rachel.anderson.northstar@gmail... 🔗

📧 maria.chen@northstarbusinessconsulti

🔗 ⚙️ — | ⌚ in 12 days

Opportunity 2

Kevin Taylor

✉ kevin.taylor.northstar@gmail.com 🔗

📧 maria.chen@northstarbusinessconsulti

🔗 ⚙️ — | No upcoming

Jason Reed

✉ jason.reed.northstar@gmail.com 🔗

📧 maria.chen@northstarbusinessconsulti

🔗 ⚙️ — | ⌚ in 5 days

Customer 3

Amanda Williams

✉ amanda.williams.northstar@gmail... 🔗

📧 maria.chen@northstarbusinessconsulti

🔗 ⚙️ — | ⌚ in 17 hours

Jessica Moore

💰 \$7,500

✉ jessica.moore.northstar@gmail.c... 🔗

📧 maria.chen@northstarbusinessconsulti

🔗 ⚙️ — | No upcoming

Elena Marks

💰 \$9,000

✉ elena.marks.northstar@gmail.com 🔗

📧 maria.chen@northstarbusinessconsulti

🔗 ⚙️ ⌚ 7 hours ago | ⓘ

Evangelist 2

Brian Halligan (Sample Contact)

✉ bh@hubspot.com 🔗

📧 Moveahead Uchendu

🔗 ⚙️ ⌚ 19 hours ago | ⓘ

Michael Carter

✉ michael.carter.northstar@gmail.c... 🔗

📧 maria.chen@northstarbusinessconsulti

🔗 ⚙️ ⌚ in a day

Tasks ▾

- All tasks
- Due today
- Overdue
- Upcoming
- +

Search (/) 🔍

Filter (1)

Sort by

Assigned to ▾

Task type ▾

Task stage ▾

Due date ▾

Queue ▾

+ 🔗

Advanced filters ✕

☐	Task Title	Task stage	Task → Contacts	Task → Companies	Last contacted
☐	> ☒ Check in with EduSpark Academy	Waiting	Rachel Anderson	EduSpark Aca...	--
☐	> ☒ Review Atlas Logistics negotiation	In Progress	Robert Adams	Atlas Logistics	--
☐	> ☒ Follow up on GreenPath proposal	Not Started	Nathan Green	GreenPath No...	--
☐	> ☒ Follow up with Harlow Legal Partners	Not Started	Olivia Harris	Harlow Legal P...	--
☐	> ☒ Customer support requirements review	Waiting	Jason Reed	Pulse Commer...	--
☐	> ☒ Client check-in with Coach Elena Marks	Not Started	Elena Marks	Coach Elena M...	--
☐	> ☒ Follow up on Ridgeview Realty negotiation	Deferred	Daniel Brooks	Ridgeview Rea...	Sep 7, 2026 4:20 PM GMT+1
☐	> ☒ Follow up on Willow Health clinic proposal	Not Started	Amanda Willia...	Willow Health ...	--
☐	> ☒ Schedule needs assessment with Vantage SaaS Grou...	Completed	Michael Carter	Vantage SaaS ...	Sep 7, 2026 4:22 PM GMT+1
☐	> ☒ Follow up with Brightline Retail Co.	Completed	Sarah Johnson	Brightline Reta...	Sep 7, 2026 4:23 PM GMT+1
☐	> ☒ (Sample task) Prepare quote for Maria Johnson (Sa...	In Progress	Maria Johnson ...	--	Sep 5, 2026 8:13 PM GMT+1
☐	> ☒ (Sample task) Follow up with Brian	Deferred	Brian Halligan (...)	--	Yesterday at 8:13 PM GMT+1

Meetings ▾

📅 All meetings

+

Search (/)

Q

≡ Filter

⇅ Sort by

Activity assigned to ▾

+

✎

≡ Advanced filters

☐ Meeting name ▾	Activity date (GMT+1)	Activity assigned to
☐ > Willow proposal review	Sep 11, 2026 11:00 PM GMT+1	MU Moveahead Uchendu (...)
☐ > Vantage Operations Needs Assessment	Tomorrow at 2:00 PM GMT+1	MU Moveahead Uchendu (...)
☐ > Brightline Bookkeeping Consultation	Sep 7, 2026 10:00 AM GMT+1	MU Moveahead Uchendu (...)
☐ > (Sample meeting) Maria Johnson (Sample Contact)	Sep 5, 2026 7:13 PM GMT+1	No owner
☐ > (Sample meeting) Cupcake creator demo	Yesterday at 8:13 PM GMT+1	No owner



5 meetings



Calls

All calls +

Search (/) Filter Sort by

Activity assigned to ▾ Activity date ▾ Call duration ▾ + Advanced filters

	Call Title	Activity date (GMT+1)	Call direction	Call outcome	Activity assigned to	Call du
	> Call with Sarah Johnson	Sep 7, 2026 4:23 PM GMT+1	Outbound	Connected	M maria.chen@northstarb...	
	> Call with Michael Carter	Sep 7, 2026 4:22 PM GMT+1	Inbound	Connected	M maria.chen@northstarb...	
	> Call with Daniel Brooks	Sep 7, 2026 4:20 PM GMT+1	Inbound	No answer	M maria.chen@northstarb...	
	> Call with Maria Johnson...	Sep 5, 2026 8:13 PM GMT+1	Inbound	Busy	M maria.chen@northstarb...	
	> Call with Brian Halligan ...	Sep 5, 2026 8:13 PM GMT+1	Outbound	Left live message	M maria.chen@northstarb...	

Segments

5 segments

Manage

Analyze

All segments

×

Unused segments

Recently deleted

+ Add view (3/5)

All views

All creators

All types

All objects

Used in

More

+

✎

≡

Advanced filters

Search segments

🔍

☐	Name ⓘ	Size ⓘ	Type ⓘ	Object ⓘ	Last updated (GMT+1) ⓘ	Creator ⓘ	Folder ⓘ	Used in (Count) ⓘ
☐	CONSULTING & PROFESSIONAL SERVICES	3	● Active	Contact	Sep 7, 2026 12:59 PM by Moveahead Uchendu	Moveahead Uchendu	-	0
☐	NEW LEADS	2	● Active	Contact	Sep 7, 2026 12:50 PM by Moveahead Uchendu	Moveahead Uchendu	-	0
☐	ACTIVE CLIENT	2	● Active	Contact	Sep 7, 2026 12:48 PM by Moveahead Uchendu	Moveahead Uchendu	-	0
☐	Not engaged with in the last 14 days	0	● Active	Contact	Sep 5, 2026 8:15 PM by Unknown user	-	-	0
☐	Engaged with in the last 14 days	7	● Active	Contact	Sep 5, 2026 8:15 PM by Unknown user	-	-	0

Activate Windo

Go to Settings to acti

Deals

All deals My deals +

Search (/) Filter Sort by Consulting Deals Pi

Deal owner Create date Last activity date Close date + Advanced filters

☐	Deal Name	Deal Stage	Amount	Close Date	Next Activity
☐	> EduSpark Academy – Customer Support Ops	Needs Assessment (Consu...	\$17,000	Dec 10, 2026 10:14 PM GMT+1	Check in with EduSpark Academy
☐	> Meridian Consulting – HR Support	Closed Lost (Consulting D...	\$10,000	Tomorrow at 10:13 PM GMT+1	Schedule
☐	> IronCore Fitness – Social Media Management	Closed Won (Consulting D...	\$7,500	Sep 20, 2026 10:12 PM GMT+1	Schedule
☐	> Atlas Logistics – Bookkeeping Support	Negotiation (Consulting D...	\$13,500	Dec 2, 2026 10:11 PM GMT+1	Review Atlas Logistics negotiation
☐	> GreenPath Nonprofit – Project Coordination	Proposal Sent (Consulting...	\$11,000	Nov 25, 2026 10:10 PM GMT+1	Follow up on GreenPath proposal
☐	> Harlow Legal Partners – Executive Assistance	Needs Assessment (Consu...	\$16,000	Nov 18, 2026 10:08 PM GMT+1	Follow up with Harlow Legal Partners
☐	> Pulse Commerce – Customer Support Ops	Initial Contact (Consulting...	\$20,000	Nov 12, 2026 9:57 PM GMT+1	Customer support requirements revie
☐	> Coach Elena Marks – Executive Assistance	Closed Won (Consulting D...	\$9,000	Sep 15, 2026 9:56 PM GMT+1	Schedule
☐	> Ridgeview Realty – Project Coordination	Negotiation (Consulting D...	\$14,000	Nov 5, 2026 9:52 PM GMT+1	Follow up on Ridgeview Realty negoti
☐	> Willow Health Clinic – HR Support	Proposal Sent (Consulting...	\$18,000	Oct 30, 2026 9:49 PM GMT+1	Follow up on Willow Health clinic pro
☐	> Vantage SaaS Group – Executive Assistance	Needs Assessment (Consu...	\$15,000	Oct 22, 2026 9:45 PM GMT+1	Schedule needs assessment with Van
☐	> Brightline Retail Co. – Bookkeeping Support	Initial Contact (Consulting...	\$12,000	Oct 15, 2026 9:43 PM GMT+1	Schedule

13 deals

Activate Wi
Go to Settings t

Contacts ▾

 All contacts  My contacts  Unassigned contacts 

Search (/)



 Filter

 Sort by

Contact owner ▾

Create date ▾

Last activity date ▾

Lead status ▾



 Advanced filters

☐	Name	Email ↕		Contact owner	Company Name	Lead Status
☐	>  Rachel Anderson	rachel.anderson.northst... 		 maria.chen@no...	EduSpark Academy	New
☐	>  Kevin Taylor	kevin.taylor.northstar@... 		 maria.chen@no...	Meridian Consulting	New
☐	>  Jessica Moore	jessica.moore.northstar... 		 maria.chen@no...	IronCore Fitness	New
☐	>  Robert Adams	robert.adams.northstar... 		 maria.chen@no...	Atlas Logistics	New
☐	>  Nathan Green	nathan.green.northstar... 		 maria.chen@no...	GreenPath Nonprofi	New
☐	>  Olivia Harris	olivia.harris.northstar@... 		 maria.chen@no...	Harlow Legal Partners	New
☐	>  Jason Reed	jason.reed.northstar@g... 		 maria.chen@no...	Pulse Commerce	New
☐	>  Elena Marks	elena.marks.northstar@... 		 maria.chen@no...	Coach Elena Marks	New
☐	>  Daniel Brooks	daniel.brooks.northstar... 		 maria.chen@no...	Ridgeview Realty	New
☐	>  Amanda Williams	amanda.williams.northst... 		 maria.chen@no...	Willow Health Clinic	New
☐	>  Michael Carter	michael.carter.northstar... 		 maria.chen@no...	Vantage SaaS Group	New
☐	>  Sarah Johnson	sarah.johnson.northstar... 		 maria.chen@no...	Brightline Retail Co.	New

15 contacts

Companies ▾

All companies

My companies

+

Search (/)

🔍

Filter

Sort by

Company owner ▾

Create date ▾

Last activity date ▾

Lead status ▾

+

📝

Advanced filters

☐	Company name	Company owner	Create Date ↓	City	Industry
☐	>  EduSpark Academy	 maria.chen@northstarb...	Sep 7, 2026 12:34 PM GMT+1	Seattle	Education Managem
☐	>  Meridian Consulting	 maria.chen@northstarb...	Sep 7, 2026 12:31 PM GMT+1	Boston	Management Consul
☐	>  IronCore Fitness	 maria.chen@northstarb...	Sep 7, 2026 12:29 PM GMT+1	Phoenix	Health, Wellness and
☐	>  Atlas Logistics	 maria.chen@northstarb...	Sep 7, 2026 12:26 PM GMT+1	Dallas	Logistics and Supply
☐	>  GreenPath Nonpro...	 maria.chen@northstarb...	Sep 7, 2026 12:24 PM GMT+1	Portland	Non-Profit Organizat
☐	>  Harlow Legal Partn...	 maria.chen@northstarb...	Sep 7, 2026 12:22 PM GMT+1	New York	Law Practice
☐	>  Pulse Commerce	 maria.chen@northstarb...	Sep 7, 2026 12:20 PM GMT+1	Los Angeles	Logistics and Supply
☐	>  Coach Elena Marks	 maria.chen@northstarb...	Sep 7, 2026 12:17 PM GMT+1	Miami	Professional Training
☐	>  Ridgeview Realty	 maria.chen@northstarb...	Sep 7, 2026 12:15 PM GMT+1	Denver	Real Estate
☐	>  Willow Health Clinic	 maria.chen@northstarb...	Sep 7, 2026 12:13 PM GMT+1	Chicago	Medical Practice
☐	>  Vantage SaaS Group	 maria.chen@northstarb...	Sep 7, 2026 12:10 PM GMT+1	Austin	Computer Software
☐	>  Brightline Retail Co.	 maria.chen@northstarb...	Sep 5, 2026 10:22 PM GMT+1	ATLANTA	Retail



*Lets Make Your Busy Life
Easier!*