

HubSpot Account Tiering & Scoring Playbook

Playbook Visual Link:  Hubspot Account Tiering.jpg

How it works?

Step 1: Analyze CRM data

Use historical data to define what a high-value account looks like.

- Export **Closed Won** and **Closed Lost** (last 12-24 months)
- For Closed Won:
 - Identify highest revenue customers
 - Analyze:
 - ACV
 - Sales Cycle
 - Expansion revenue
 - Look for patterns across:
 - Industry
 - Company size
 - Geography
- For Closed Lost:
 - Identify common disqualification patterns:
 - Poor-fit industries
 - Company size mismatch

Step 2: Define account segmentation

Set up how accounts will be grouped and prioritized.

- Define segment based on:
 - Company size
 - Industry
 - Business model
- Define scoring logic using:

- Firmographics (size, revenue, industry)
- Technographics
- Signals
- Define tier structure:
 - Tier 1: Strong fit
 - Tier 2: Good fit
 - Tier 3: Low fit

Step 3: Build Clay data model

Structure the account database in Clay.

- Create core fields:
 - Company name
 - Domain
 - LinkedIn URL
- Add enrichment fields:
 - Employee count
 - Revenue
 - Industry
 - Location
 - Tech stack
- Add logic fields:
 - Segment
 - Tiering

Step 4: Enrich accounts and assign tiers

Populate data and apply scoring.

- Run enrichment in Clay:
 - Fill missing firmographic data
 - Add technographics data
- Apply scoring logic:
 - Use Clay formulas
 - Assign final tier

Step 5: Sync data to HubSpot

Push structured account data into CRM.

- Create properties:
 - Account Tier
 - Segment
 - Key firmographic fields
- Sync data from Clay:
 - Company
 - Contacts
- Ensure:
 - Correct field mapping
 - No duplication

Step 6: Build HubSpot Automation Workflows

Automate tier assignment and updates.

- Create company-based workflows
- Use property-based triggers
- Enable re-enrollment
- Assign tiers dynamically
- Add fallback:
 - Flag accounts with missing tier

Step 7: Monitor and optimize

Continuously improve accuracy and performance.

- Track:
 - Conversion rate by tier
 - Deal size
 - Sales cycle
- Monitor
 - Data quality
 - Tier distribution
- Run
 - Monthly data reviews



- Quarterly strategy updates