

Marketing Contacts

We've rounded up some best practices to help you get started and continue to maintain a clean database over time.

Getting Started

Use the eligibility flow



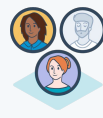
Your CSM will send you a link to this tool, which will help you understand how many marketing contacts you should purchase. You'll be able to set which contacts should be eligible for marketing activities (i.e. which count toward your contact tier), and exclude others from counting toward your tier before signing up.

View the number of contacts in your tier



Knowing your current numbers will be helpful as you get started, as well as for continued maintenance. Follow the steps in [this Knowledge Base article](#) to view the number of marketing contacts you have, your current contact tier, and your total number of contacts.

Set contacts as marketing or non-marketing



[Set a contact as marketing](#) in order to use marketing emails, ads, and marketing actions in workflows with them. For even more control, [prevent other users from updating contacts as marketing](#). Or, preemptively [set a contact as non-marketing](#) so they don't count towards your contact tier in the next billing cycle.

Tips for Ongoing Maintenance

Customize default marketing status



Every newly created contact in your HubSpot account will have a marketing status. For contacts created through some tools, you can [set the default value you want](#). Defaults that can be customized include those created by the import tool, chatflows tools (both live chats and bots), and HubSpot forms.

Automatically set contacts as marketing using workflows



If you have access to the workflows tool, you can [automatically set contacts as marketing or non-marketing based on their property values](#).

Standardize your data cleaning process



Establish a standardized process in which you identify inaccurate or incomplete data, correct or remove identified data, and repeat at a regular cadence. One way to do this would be to utilize the eligibility flow before the start of a contract, as a monthly spot check, and/or at renewal.

