

Future-Proofing Your CRM: How to Stay Ahead After HubSpot Insights Ends

Guide



Preface

Welcome! If you're reading this, you've either attended our recent webinar or are looking for ways to ensure your CRM remains a powerful, data-driven tool even after HubSpot Insights is discontinued.

Customer relationship management (CRM) data isn't just a resource—it's the foundation of sales, marketing, and customer success.

That challenge is about to get bigger. HubSpot Insights has officially sunset, leaving businesses without an automated way to enrich company records. Without automatic data updates, teams will struggle with outdated information, weaker segmentation, and a CRM that no longer fuels efficient decision-making.

Breeze Intelligence, powered by HubSpot's acquisition of Clearbit, ensures that businesses continue to have real-time, enriched CRM data—without the manual hassle. It automatically updates company and contact records, tracks buyer intent, and enhances lead qualification, ensuring your team always works with the most up-to-date information.

This eBook expands on the insights shared in our Future-Proofing Your CRM webinar.

Introduction

Your CRM is only as good as the data inside it. Businesses rely on CRM data in a digital economy to drive sales, marketing, and customer success. But what happens when that data starts to decay?



60% of CRM data becomes outdated within two years.

(Source: [Prove](#))

That means contact information, company details, and firmographic data degrade faster than most teams realize. And if your CRM is running on stale or incomplete records, you're working with bad data—leading to missed deals, wasted time, and lost revenue.

With HubSpot Insights shutting down, teams can no longer access the automatic enrichment it provided. Breeze Intelligence is the solution. Built on HubSpot's Clearbit acquisition, Breeze keeps CRM records accurate and actionable by enriching data in real-time.

In this guide, we'll walk through the impact of losing HubSpot Insights, how Breeze Intelligence fills the gap, and what you can do to keep your CRM future-ready.

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The CRM Data Crisis: What's Happening?



Customer relationship management (CRM) systems are designed to give businesses a clear, organized view of their prospects and customers. But what happens when that data becomes unreliable?

It's an issue many teams don't realize is happening—until it starts affecting sales, marketing, and customer success.

CRM data becomes outdated quickly, creating significant challenges for companies that rely on firmographic data to segment leads, personalize outreach, and make data-driven decisions.

With HubSpot Insights shutting down, businesses are losing a tool that keeps CRM records accurate and enriched with essential company details like industry, revenue, and employee count.

Without an alternative, teams are left to manually update records—a slow, error-prone, and ultimately unsustainable process.

Why CRM Data Degrades Over Time

Business information is constantly changing. Companies merge, rebrand, expand, and shift industries while employees change roles, get promoted, or leave. CRM records quickly become outdated; there is no way to automatically track and update these changes.

For example, a sales rep might follow up with a promising lead only to find that their contact left the company six months ago.



Marketing campaigns could target businesses no longer fit ideal customer profiles, leading to wasted ad spend and poor engagement. Customer success teams may struggle to provide relevant support if they work off old data.

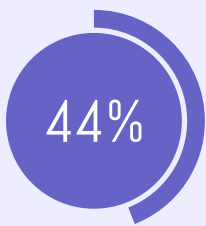
Before HubSpot Insights, these details were automatically enriched whenever a new company was added to the CRM. Without automated updates, businesses face an uphill battle to keep records current.



The Risks of Relying on Outdated or Incomplete Records

Bad CRM data isn't just an inconvenience—it directly impacts revenue and efficiency. Companies that rely on outdated records experience:

- Lower lead conversion rates due to missing or incorrect contact details.
- Longer sales cycles as reps waste time researching prospects instead of selling.
- Weaker segmentation for marketing campaigns leads to poor targeting and engagement.
- Friction between marketing and sales, with teams struggling to align due to inconsistent data.



According to industry research, 44% of businesses estimate that inaccurate CRM data costs them at least 10% of lost revenue annually.

Not just sales and marketing feel the impact—customer success teams also suffer when missing or incorrect data leads to poor customer experiences and lower retention rates.

How Manual Data Entry Slows Teams Down

Without automated enrichment, teams will have to manually update company and contact records, which is time-consuming and unsustainable at scale.

Sales reps who should be closing deals will instead be spending hours researching and inputting firmographic data. Marketers must scrub lists manually before running campaigns, increasing the risk of human error.



Customer success teams must double-check details before every interaction, reducing efficiency and making it harder to build meaningful customer relationships.

Manual data entry is a drain on time and resources. As CRM data degrades, businesses will fall behind competitors that automate and streamline their data management.

The Role of Automated Data Enrichment in Modern CRM Management

Businesses that want to stay ahead can't afford to rely on manual updates. The most efficient teams use automated data enrichment to ensure their CRM records are always accurate, complete, and actionable.

That's precisely where Breeze Intelligence comes in.

Based on HubSpot's Clearbit acquisition, Breeze automatically updates CRM records with real-time firmographic and technographic data. It ensures that every company and contact record remains fresh, helping teams:

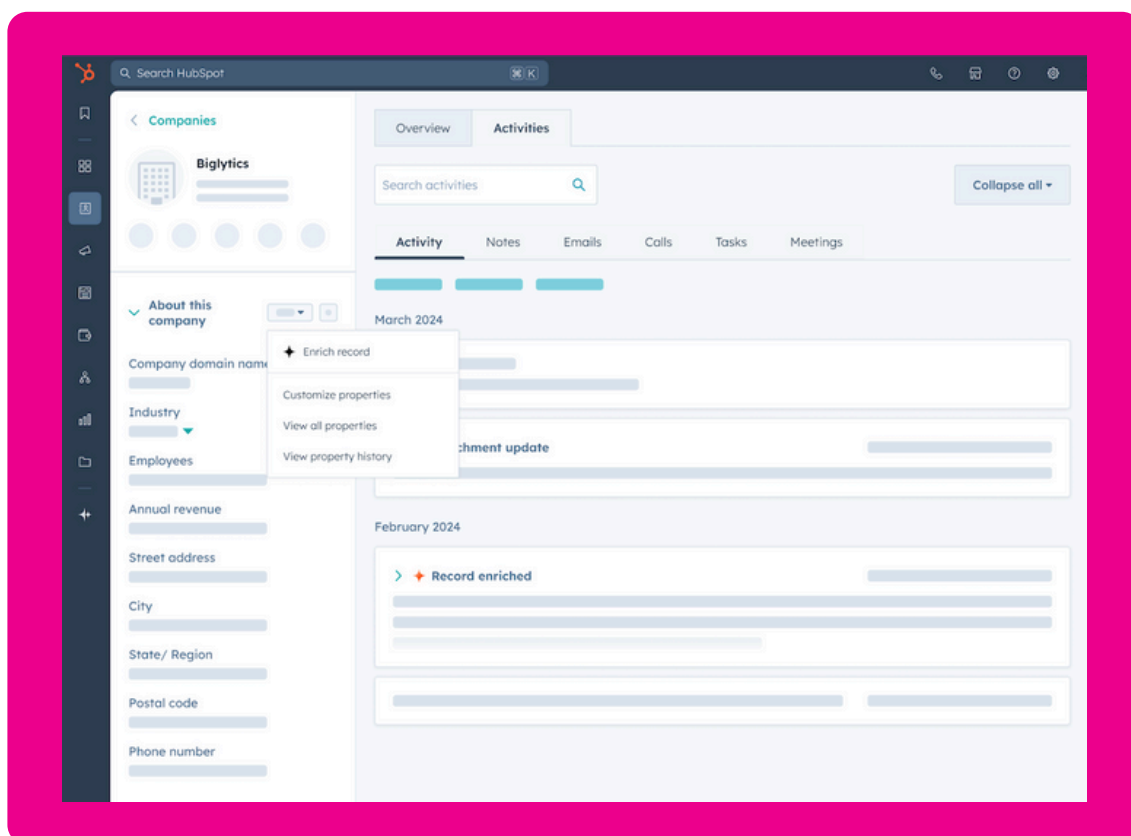
- Enrich leads instantly to improve segmentation and targeting.
- Keep sales reps focused on selling instead of data entry.
- Reduce marketing waste by ensuring campaigns reach the right audience.
- Provide customer success teams with up-to-date insights to improve retention and upsells.

The future of CRM isn't just about storing data—it's about making it intelligent. With HubSpot Insights gone, businesses need a solution that automatically updates CRM records—or risk working with outdated, incomplete information that costs time, money, and missed opportunities.

Breeze Intelligence makes sure that doesn't happen.



Meet Breeze Intelligence: The Future of AI-Powered Data Enrichment



Breeze Intelligence keeps your CRM accurate, complete, and always up to date—without the manual work. Clearbit fills in missing company and contact details, tracks high-intent leads, and improves form conversions to get richer data with less effort.

Sales reps reach the right decision-makers faster. Marketers create better-targeted campaigns. Customer success teams spot upsell and renewal opportunities before they happen.

Here's how Breeze Intelligence makes CRM data work for you.

1. Automatically Enrich Company and Contact Record

Adding new companies and contacts to a CRM is often a frustrating experience. Records come in incomplete, missing key details like company size, industry, or revenue, leaving teams scrambling to fill in the gaps manually.

Breeze Intelligence eliminates this issue by automatically enriching every record with verified data as soon as it's added to HubSpot.

The system pulls essential business insights from Clearbit's database and syncs them into your CRM, ensuring that every company and contact profile includes the following:

- Company name and website
- Industry and sector classification
- Annual revenue and employee count
- Company headquarters and office locations
- Technographic details, including software and platforms used

How to Apply This in Your Workflow



Sales teams can instantly assess a prospect's size, industry, and buying potential—eliminating time spent researching before outreach.



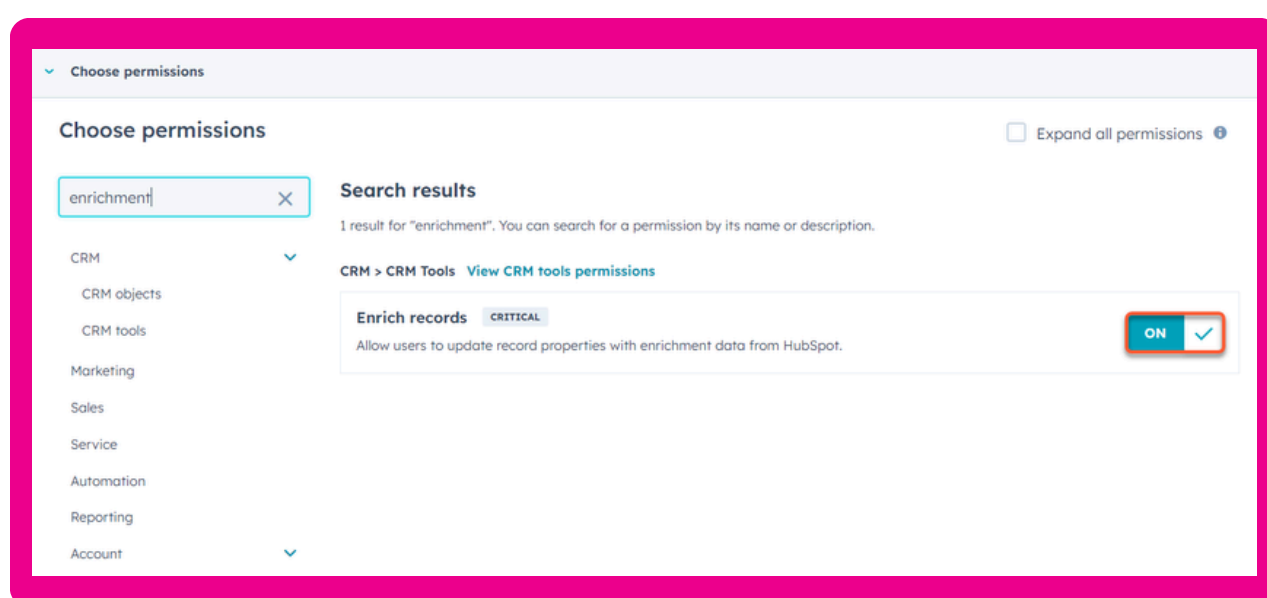
Marketing teams can build highly targeted campaigns based on enriched firmographic data, ensuring better segmentation and personalization.



Customer success teams can monitor evolving customer profiles, ensuring support is tailored to current company needs.

Enriching CRM records means teams continuously work with accurate data, leading to faster decision-making and fewer wasted efforts.

How to Apply This in Your Workflow



Keeping CRM records complete and accurate is crucial for effective sales, marketing, and customer success. Breeze Intelligence automates data enrichment, filling in missing details so your team doesn't have to.

Enable Data Enrichment

1. In your **HubSpot** account, click the **settings icon** in the top navigation bar.
2. In the left sidebar, go to **Data Management > Data Enrichment**.

3. Under the **Settings tab**, configure enrichment for contacts and companies:

- **Automatically enrich new records** (recommended)
- **Allow manual enrichment**
- **Continuously enrich existing records**

4. Save your changes.

Note: Contact records require a **business email address** (no Gmail, Yahoo, etc.). Company records require a **domain name** to be enriched.

Manually Enrich Individual Records

1. Navigate to **CRM > Contacts** or **CRM > Companies** in HubSpot.
2. Click on a record you'd like to enrich.
3. In the **About this Contact/Company** section, click **Actions > Enrich Record**.
4. In the right panel, select which properties to update.
5. Click **Enrich Record** to apply the updates.

Enrich Multiple Records at Once

1. Navigate to **CRM > Contacts** or **CRM > Companies**.
2. Select the checkboxes next to multiple records.
3. Click **Enrich Records** at the top of the table.
4. Review the available credits and confirm enrichment.

Tip: You can also enrich records in bulk using **Lists** in HubSpot.

2. Keep CRM Data Accurate with Real-Time Updates

Business details don't stay the same for long. Companies expand, rebrand, restructure, or shift focus, and without automated updates, CRM records quickly become unreliable.

When sales reps engage a lead based on outdated information, it leads to missed opportunities, irrelevant messaging, and wasted time.

Breeze Intelligence ensures that those updates are automatically reflected in HubSpot as soon as a company changes. This includes:

- **Job title and role changes for key contacts**
- **New office locations and expanded company presence**
- **Adjustments to company size, revenue, and employee count**
- **Technology stack updates, helping teams track evolving software adoption**

How to Apply This in Your Workflow



Sales teams can maintain engagement with decision-makers, even if roles change, reducing churn in prospecting pipelines.



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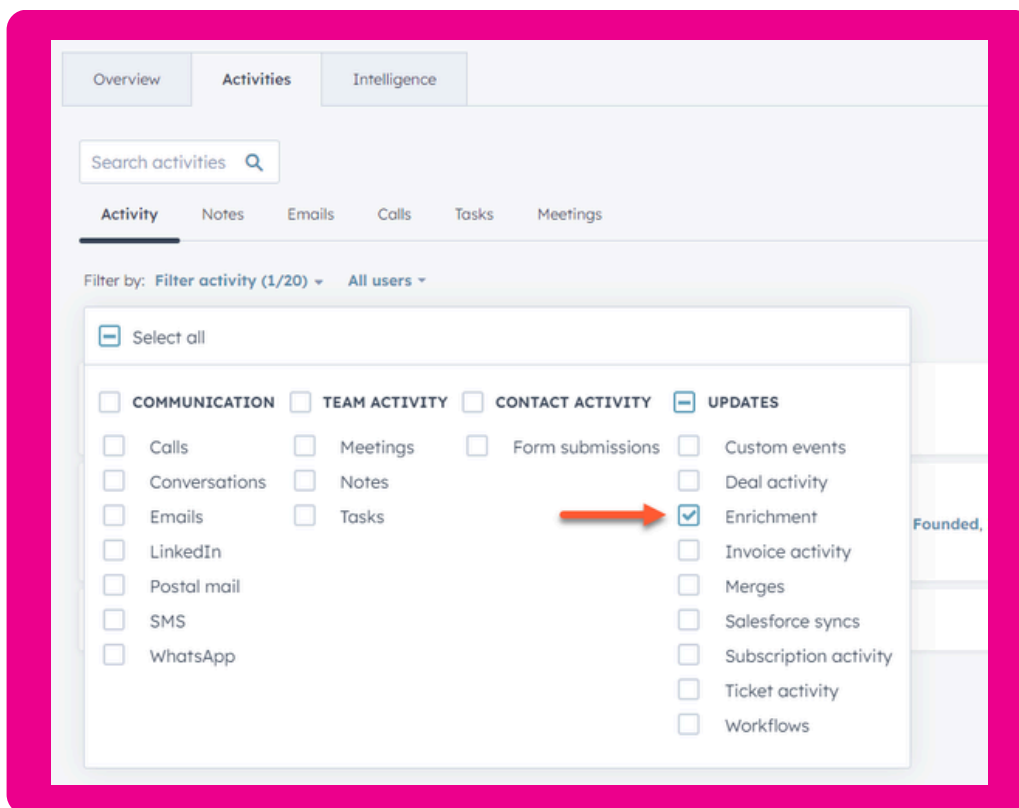
Marketing teams can refine audience segmentation over time, ensuring campaigns continue targeting the right businesses.



Customer success teams can track client growth, acquisitions, or changes, ensuring account strategies stay relevant.

With real-time updates, CRM data remains reliable, actionable, and always reflective of the current business landscape.

How to Review Enrichment History for Contacts and Companies



Tracking enrichment activity helps teams verify when and how records were updated.

Check Enrichment History for a Single Record

1. Navigate to **CRM > Contacts** or **CRM > Companies**.
2. Open a record and click the **Activities** tab.
3. Click **Filter by > Enrichment** to view a timeline of updates.
4. Click on a specific property to see changes over time.

Filter CRM Records by Enrichment Status

1. Go to **CRM > Contacts** or **CRM > Companies**.
2. Use the filter **Has been enriched = True** to find enriched records.
3. Click on a record to view details.

Tip: Use this to track data quality improvements and ensure teams are using the most current information.

3. Track Buyer Intent and Engage Prospects at the Right Time

Not every lead in a CRM is equally engaged. Some companies are just beginning their research, while others actively evaluate vendors. Identifying these high-intent prospects early can make the difference between winning and losing a deal.

Breeze Intelligence includes buyer intent tracking, which analyzes online behaviors to reveal which companies are actively researching your product or services. This data is pulled directly into HubSpot, helping sales and marketing teams focus on the most engaged leads.

Buyer intent tracking provides:

- **Website visit insights**—which businesses repeatedly visit high-value pages.
- **Engagement tracking**—how often a company interacts with content and product pages.
- **Scoring and prioritization**—ranking leads based on their behavior and conversion likelihood.

How to Apply This in Your Workflow



Sales teams can identify and reach out to companies already showing interest—making outreach more timely and relevant.



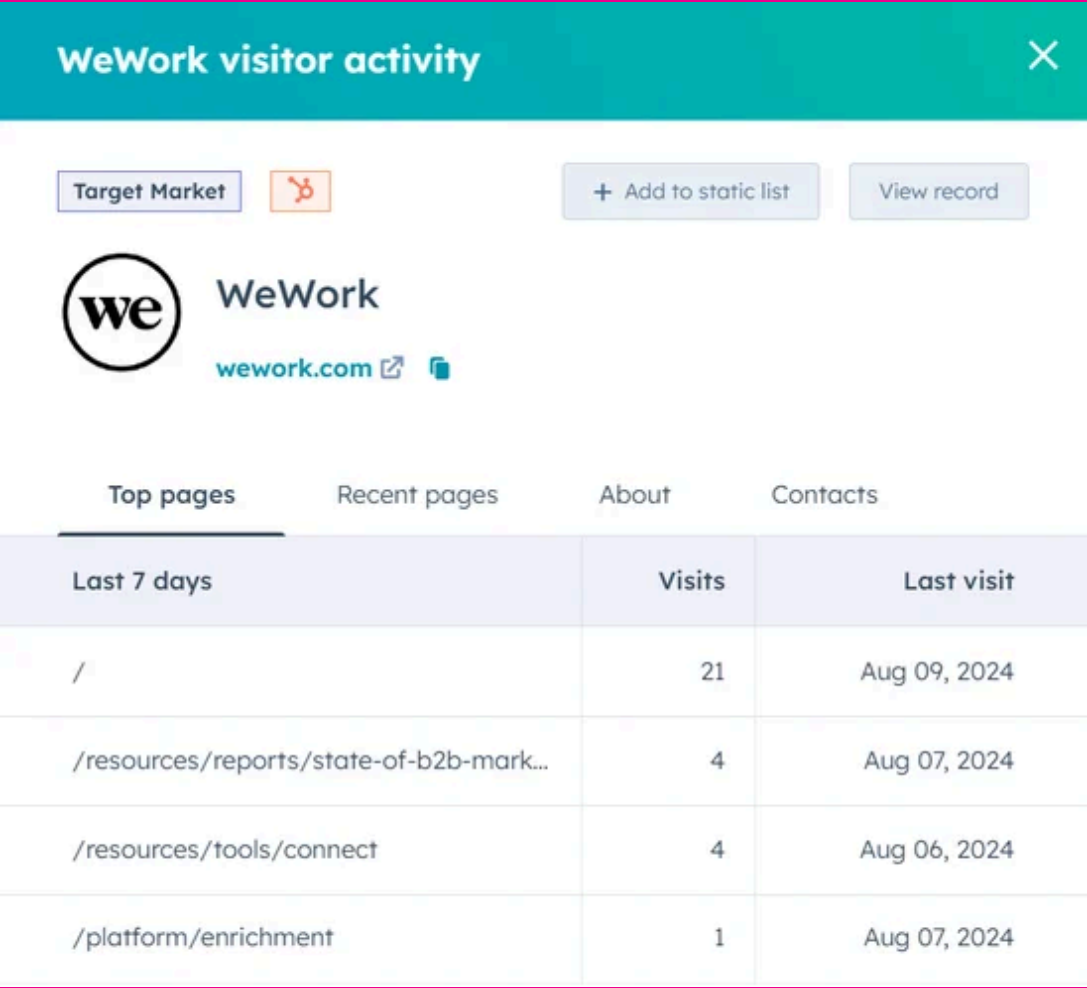
Marketing teams can retarget engaged leads with customized ads and email sequences, ensuring prospects stay in the funnel.



Customer success teams can monitor existing customers who revisit pricing or product pages, helping anticipate upsell or renewal opportunities.

Using buyer intent signals, teams can focus on warm, high-potential leads—accelerating conversion rates and driving more effective engagement.

How to Track Buyer Intent and Identify High-Intent Leads



The screenshot displays the 'WeWork visitor activity' dashboard. At the top, there's a teal header with the title and a close button. Below the header, there are filters for 'Target Market' and a '+ Add to static list' button, along with a 'View record' button. The WeWork logo and website URL 'wework.com' are shown. A tabbed interface includes 'Top pages', 'Recent pages', 'About', and 'Contacts'. The 'Top pages' tab is active, showing a table with columns for 'Last 7 days', 'Visits', and 'Last visit'.

Last 7 days	Visits	Last visit
/	21	Aug 09, 2024
/resources/reports/state-of-b2b-mark...	4	Aug 07, 2024
/resources/tools/connect	4	Aug 06, 2024
/platform/enrichment	1	Aug 07, 2024

Buyer intent tracking helps you spot companies actively researching your business by matching website visits to company IP addresses.

Set Up Buyer Intent Tracking

1. Make sure the **HubSpot tracking code** is installed on your website.
2. In HubSpot, navigate to **Marketing > Buyer Intent**

3. Click **Configuration** and set up:
 - **Target markets** (the companies you want to track).
 - **Intent criteria** (visit count, unique visitors, specific page views).

Filter and Analyze Buyer Intent Data

1. Go to Marketing > Buyer Intent.
2. Use filters to refine results by:
 - **Timeframe** (e.g., last 7 days, last 30 days).
 - **Target markets** (companies that match your ideal profile).
 - **Intent signals** (companies visiting key pages).
 - **CRM status** (companies already in your database or new visitors).

Add High-Intent Companies to Your CRM

1. In **Buyer Intent**, find a company with strong engagement.
2. Click + **Add to Companies** to create a new CRM record.
3. Select multiple records and click + **Add to Companies** to enroll various companies at once.
4. To track progress, filter by **Lifecycle Stage** or **Deal Stage**.

Tip: Use this data to prioritize warm leads, retarget visitors, and personalize outreach based on real-time engagement.

4. Shorten Forms Without Losing Valuable Lead Data

Long forms reduce conversion rates, but removing fields often leads to less qualified leads. Businesses need to balance capturing enough data to segment and prioritize leads while keeping forms frictionless and user-friendly.

Breeze Intelligence enables form shortening by dynamically filling in missing details behind the scenes.

Instead of asking users to manually enter details like company name, industry, or revenue, Breeze retrieves this information automatically—allowing forms to remain short while capturing rich lead data.

How to Apply This in Your Workflow



Marketing teams can increase form submission rates by requiring fewer fields while ensuring high-quality lead data enters the CRM.

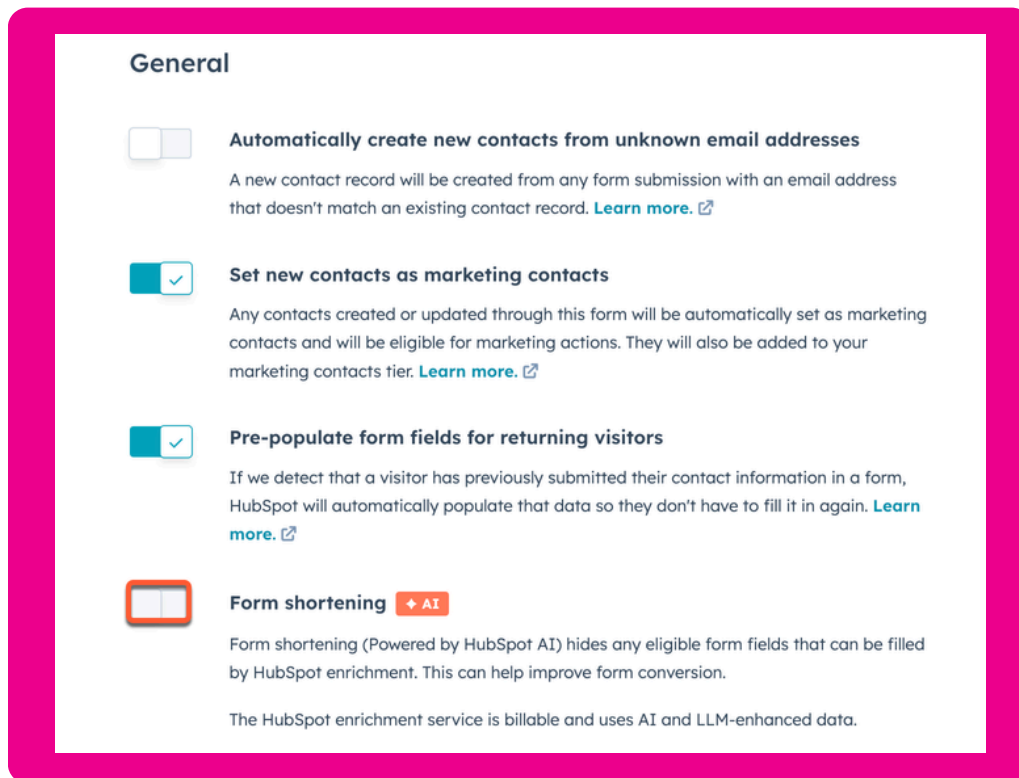


Sales teams can receive pre-qualified leads without asking prospects to complete lengthy forms manually.



Customer success teams can ensure consistent and complete customer records from the first point of contact.

With Breeze-powered forms, businesses no longer have to choose between lead quality and conversion rates—they get both.



General

☐ **Automatically create new contacts from unknown email addresses**
A new contact record will be created from any form submission with an email address that doesn't match an existing contact record. [Learn more.](#)

☒ **Set new contacts as marketing contacts**
Any contacts created or updated through this form will be automatically set as marketing contacts and will be eligible for marketing actions. They will also be added to your marketing contacts tier. [Learn more.](#)

☒ **Pre-populate form fields for returning visitors**
If we detect that a visitor has previously submitted their contact information in a form, HubSpot will automatically populate that data so they don't have to fill it in again. [Learn more.](#)

☒ **Form shortening** + AI
Form shortening (Powered by HubSpot AI) hides any eligible form fields that can be filled by HubSpot enrichment. This can help improve form conversion.

The HubSpot enrichment service is billable and uses AI and LLM-enhanced data.

Long forms frustrate prospects and lower submission rates. Breeze Intelligence dynamically removes unnecessary fields by pre-filling known information.

Enable Form Shortening

1. In **HubSpot**, click the settings icon.
2. Go to **Data Management > Enrichment**.
3. Click the **Tools** tab.
4. Toggle **Forms** to **ON**.

Enable Form Shortening on a Specific Form

1. Navigate to **Marketing > Forms**.
2. Create a new form or edit an existing one.
3. Click the **settings icon** in the left panel.
4. Toggle **Form Shortening to ON**.
5. Save your form.

Analyze Form Submission Data

1. Navigate to **Marketing > Forms**.
2. Click on a specific form submission.
3. View enriched properties (marked with an AI icon).

Tip: Breeze only displays fields that **cannot** be enriched, meaning visitors enter less information while you still collect **complete lead data**.

5. Seamless Integration with HubSpot for Effortless Data Management

Traditional CRM enrichment tools require third-party integrations, manual syncing, and constant troubleshooting. Breeze Intelligence eliminates these issues by working natively inside HubSpot with zero extra setup required.

Every Breeze feature—data enrichment, real-time updates, buyer intent tracking, and form shortening—operates seamlessly within HubSpot, ensuring that teams can always access the most current and actionable data.

How to Apply This in Your Workflow

Enable automatic data enrichment for all new company and contact records in HubSpot.

Use updated firmographic data in workflows, optimizing lead routing and segmentation.

Trigger automation based on buyer intent signals ensures engaged leads receive immediate follow-ups.

With built-in HubSpot compatibility, Breeze makes CRM management smarter, not harder.



How Breeze Intelligence Transforms Your CRM Workflow

When records are incomplete, outdated, or inaccurate, sales slow down, marketing campaigns underperform, and customer success teams struggle to provide proactive support.

Breeze Intelligence eliminates these challenges by continuously enriching CRM records, tracking buyer intent, and automating data updates—so teams constantly work with the most reliable, real-time information.

Here's how it transforms your CRM workflow.

Lead Segmentation and Routing: Get the Right Leads to the Right Teams

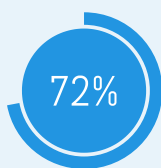
A strong CRM starts with proper lead segmentation—but without enriched data, it's challenging to sort leads by industry, revenue, company size, or technology stack.

When leads aren't adequately segmented, they end up in the wrong workflows, get assigned to the wrong reps, or sit untouched because no one knows who should follow up.

Breeze ensures that every new lead is instantly enriched with critical firmographic details, allowing businesses to organize their CRM more effectively.

Instead of manually updating records or guessing which sales rep should handle a lead, companies can rely on Breeze to keep things structured from the start.

With accurate segmentation, marketing teams can send relevant messaging to the right industries, and sales teams can prioritize outreach based on real-time insights. Leads land with the right person every time.



72% of businesses report poor CRM data creates friction between marketing and sales teams, leading to lost opportunities.

With Breeze Intelligence, teams can trust that every lead is properly categorized—no more misrouted contacts or wasted effort on unqualified prospects.

Sales Efficiency and Prospecting: Spend More Time Selling, Less Time Researching

Sales teams waste time manually researching leads, verifying company details, and updating CRM records.

Breeze Intelligence eliminates the need for manual research by keeping CRM records complete and current. When a lead enters the system, it's automatically enriched with firmographic and technographic data so sales teams can see company size, industry, and revenue at a glance.

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Breeze Intelligence eliminates the need for manual research by keeping CRM records complete and current. When a lead enters the system, it's automatically enriched with firmographic and technographic data so sales teams can see company size, industry, and revenue at a glance.

Instead of searching for missing details, reps can jump straight into outreach with confidence that they're engaging with the right decision-makers.

When CRM data becomes outdated, sales teams must rely on manual updates—unless they have an automated enrichment tool like Breeze.

With real-time enriched data, sales teams can increase efficiency, improve response times, and close more deals faster.

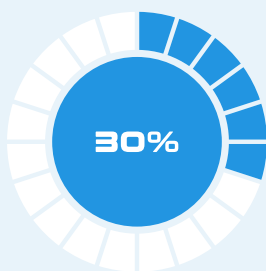
Marketing Personalization and Campaign Targeting: Reach the Right Audience Every Time

Marketing is only as effective as the data behind it. When CRM records lack firmographic details, campaign targeting becomes a guessing game. Instead of reaching the right audience, businesses waste time and budget marketing to companies that aren't a good fit.

Without enriched data, personalization suffers, and lead conversion rates drop.

Breeze Intelligence transforms how marketing teams engage with prospects. Segmentation is precise, and campaigns reach decision-makers in the most critical industries. Marketers can filter leads by company size, revenue, or technology stack so that messaging resonates.

With buyer intent tracking, marketing teams can identify companies actively researching their products and services. Instead of relying on broad campaigns, they can focus on leads that have already shown interest, increasing engagement rates and driving higher conversions.



Businesses see accurate results when marketing and sales align through shared, enriched data. Companies using AI-driven lead enrichment report a 30% boost in sales productivity, proving that accurate data isn't just an operational benefit—it directly impacts revenue growth.

Customer Success and Account Management: Proactively Retain and Upsell Customers

Strong customer relationships depend on having accurate, up-to-date information. When CRM records lack details about a company's growth, technology stack, or recent activity, customer success teams are forced to react instead of proactively engaging clients.



Is Breeze Intelligence Right for Your Business?

Still unsure if Breeze Intelligence is a good fit? Answer the following questions to see whether AI-powered CRM enrichment is the missing piece in your workflow.

1. How has weak CRM data affected your team?

If you're struggling with incomplete or outdated records, Breeze is a must.

Insufficient CRM data slows down every department—sales waste time researching leads, marketing struggles to segment lists, and customer success teams lose track of client changes, without an automated way to enrich and update records, CRM efficiency plummets.

Breeze Intelligence ensures your CRM is always filled with up-to-date, complete, and actionable data.

2. If you lost HubSpot Insights, what changed for you?

If losing HubSpot Insights created data gaps, Breeze Intelligence is the best replacement.

With HubSpot Insights gone, teams are now responsible for manually updating company details—a slow, error-prone, and inefficient process. Breeze fills this gap by automatically enriching records in real-time, ensuring your CRM never goes stale.

3. Have you noticed more manual data entry slowing your workflow?

If your team spends hours manually updating CRM records, Breeze Intelligence saves time.

Without automated data enrichment, teams must research, verify, and input company details, taking time away from selling marketing and customer engagement. Breeze eliminates this manual effort by continuously enriching and updating records behind the scenes.

4. Are firmographic details missing from new leads, making qualification harder?

If you struggle to route, qualify, or segment leads due to missing data, Breeze Intelligence is essential.

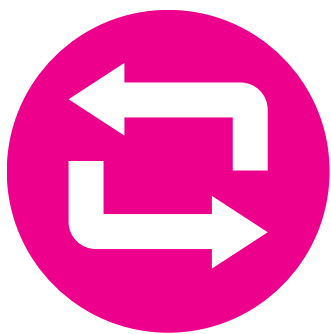
Without firmographic data (like industry, revenue, and employee count), teams can't correctly score, segment, or prioritize leads—leading to lost sales opportunities and inefficient marketing.

Breeze ensures every new record is instantly enriched, giving your team all the necessary details.

5. Do you see Breeze Intelligence fitting into your workflow?

If you rely on HubSpot for CRM management, Breeze Intelligence is the perfect add-on.

Breeze integrates seamlessly with HubSpot, working behind the scenes to automatically enrich records, track buyer intent, and improve lead conversion. If your team wants to spend less time managing data and more time acting on it, Breeze is a wise investment.



Let's Recap

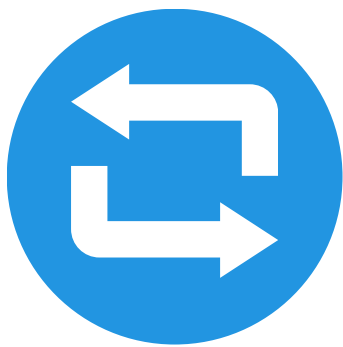
Keeping your CRM data accurate, enriched, and up to date is no longer optional—it's a necessity. Without clean data, sales teams waste time chasing bad leads, marketing campaigns miss their target, and customer success teams struggle to provide meaningful support.

With HubSpot Insights gone, businesses that rely on automatic data enrichment need a new solution. Breeze Intelligence fills that gap, ensuring CRM records stay fresh, complete, and actionable—without manual updates.

Throughout this guide, we've explored how Breeze Intelligence transforms CRM workflows by:

- **Automatically enriching company and contact records** so teams never have to update missing firmographic data manually.
- **Enhancing lead segmentation and routing** ensures the right sales reps engage with the right prospects.
- **Improving sales efficiency and prospecting** by eliminating time-consuming research and enabling reps to focus on closing deals.
- **Optimizing marketing personalization and campaign targeting** with detailed firmographic and technographic data.
- **Helping customer success teams proactively manage accounts** by tracking client updates and buyer intent signals.

We also walked through questions to determine if Breeze Intelligence is right for your business. If your team struggles with outdated CRM data, inefficient lead qualification, or excessive manual data entry, then automating your CRM enrichment with Breeze is the next step.



Final Thoughts: Future-Proof Your CRM with Breeze Intelligence

Your CRM should work for you—not the other way around. A system filled with stale, incomplete, or inaccurate data leads to wasted time, poor segmentation, and lost revenue.

CRM records degrade over time without automatic updates, forcing teams to rely on manual research, repetitive data entry, and inefficient workflows.

Breeze Intelligence eliminates these pain points by seamlessly enriching CRM records, tracking real-time buyer intent, and ensuring every team works with the most accurate data.

Breeze Intelligence is a game-changer for businesses looking to streamline lead qualification, improve sales efficiency, personalize marketing efforts, and strengthen customer relationships. It's not just about having data—it's about having the right data, when and where you need it.

If you're ready to take your CRM to the next level, now is the time to integrate Breeze Intelligence and ensure your business is powered by clean, enriched, and intelligent data.