

## **Top 10 Features in HubSpot Operations Hub Professional & Enterprise**

This document outlines the top features available exclusively in HubSpot's Operations Hub Professional and Enterprise tiers. Each feature includes a description, availability, whether it requires credits, a documentation link, and three real-world use cases.

### **Data Quality Automation**

Automate fixing messy data—like proper capitalization or consistent phone number formats—directly inside workflows.

Availability: Professional, Enterprise (Operations Hub only)

Requires Credits: No

HubSpot Documentation Link:

<https://knowledge.hubspot.com/workflows/use-data-quality-actions-in-workflows>

Use Cases:

- Ensure first/last names are always capitalized.
- Normalize date formats for cleaner reporting.
- Auto-correct inconsistent phone number formatting.

### **Scheduled Workflow Triggers**

Schedule workflows to run at specific times or intervals (e.g., daily, weekly)—not just based on record events.

Availability: Professional, Enterprise (Operations Hub only)

HubSpot Documentation Link: <https://knowledge.hubspot.com/workflows/schedule-workflows>

Use Cases:

- Send weekly reports on open deals.
- Run monthly cleanup of stale contacts.
- Trigger quarterly lead requalification tasks.

### **Data Quality Command Center**

A central dashboard that highlights CRM data health—duplicates, property issues, formatting errors, etc.

Availability: Professional, Enterprise (Operations Hub only)

HubSpot Documentation Link:

<https://knowledge.hubspot.com/account/manage-your-data-quality-with-the-data-quality-command-center>

Use Cases:

- Find and resolve duplicate contact or company records.
- Track missing or incomplete CRM fields.

- Identify inconsistent formatting across the database.

### **Bulk Duplicate Management (with Automation)**

Identify and automatically resolve duplicate records at scale using smart logic and bulk merge tools.

Availability: Professional, Enterprise (Operations Hub only)

HubSpot Documentation Link: <https://knowledge.hubspot.com/contacts/manage-duplicate-records>

Use Cases:

- Clean up thousands of duplicate contacts before campaigns.
- Merge duplicate companies based on domain or name match.
- Resolve post-import duplication in one workflow sweep.

### **AI-Powered Data Formatting Suggestions**

HubSpot's AI flags and recommends formatting fixes across your CRM data (e.g., industry names, titles).

Availability: Professional, Enterprise (Operations Hub only)

HubSpot Documentation Link:

<https://knowledge.hubspot.com/account/use-ai-powered-data-formatting-recommendations>

Use Cases:

- Normalize job titles like “CEO” and “Chief Exec Officer”.
- Standardize industries for cleaner segmentation.
- Catch and fix inconsistencies in company names.

### **Datasets**

Build curated, structured datasets that users can plug directly into reports—no need to know the CRM schema.

Availability: Enterprise only (Operations Hub)

HubSpot Documentation Link: <https://knowledge.hubspot.com/reports/create-and-use-datasets>

Use Cases:

- Build a trusted dataset for sales reporting across teams.
- Enable marketing to self-serve campaign performance metrics.
- Create datasets for consistent revenue dashboards.

### **Advanced Data Calculations in Datasets**

Use formulas, logic, and calculated fields inside datasets—without spreadsheets or exports.

Availability: Enterprise only (Operations Hub)

HubSpot Documentation Link:

<https://knowledge.hubspot.com/reports/create-and-use-datasets#add-calculated-fields>

Use Cases:

- Calculate customer lifetime value (CLTV) from deal data.
- Measure sales velocity with pipeline stage duration.
- Create advanced KPIs by combining deal and contact data.

### Webhooks in Workflows

Send data from HubSpot to other tools in real-time using webhooks, enabling real-time sync with external platforms.

Availability: Professional, Enterprise (Operations Hub only)

HubSpot Documentation Link: <https://knowledge.hubspot.com/workflows/use-webhooks-in-workflows>

Use Cases:

- Trigger order fulfillment in a third-party system when a deal closes.
- Update external CRM with new lead info instantly.
- Sync contact data to a customer portal automatically.

### Programmable Automation

Write custom JavaScript or Python in workflows to automate advanced logic. Great for tailoring automations around your business rules.

Availability: Professional, Enterprise (Operations Hub only)

Requires Credits: No

HubSpot Documentation Link:

<https://knowledge.hubspot.com/workflows/use-custom-code-actions-in-workflows>

Use Cases:

- Fetch live lead data from Clearbit and enrich records.
- Trigger renewal workflows for long-term clients.
- Route leads dynamically based on multiple custom criteria.