WEBINAR

The HubSpot Geek on taxonomies and naming conventions



Articulate

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```
LPSTR    lpszClassName;
HWND     hwndParent;
DWORD    dwStyle;
BOOL     fVisible;
LPARAM   lParam;
```

At 21, I wrote an article praising this.

It made code look like, well, code.

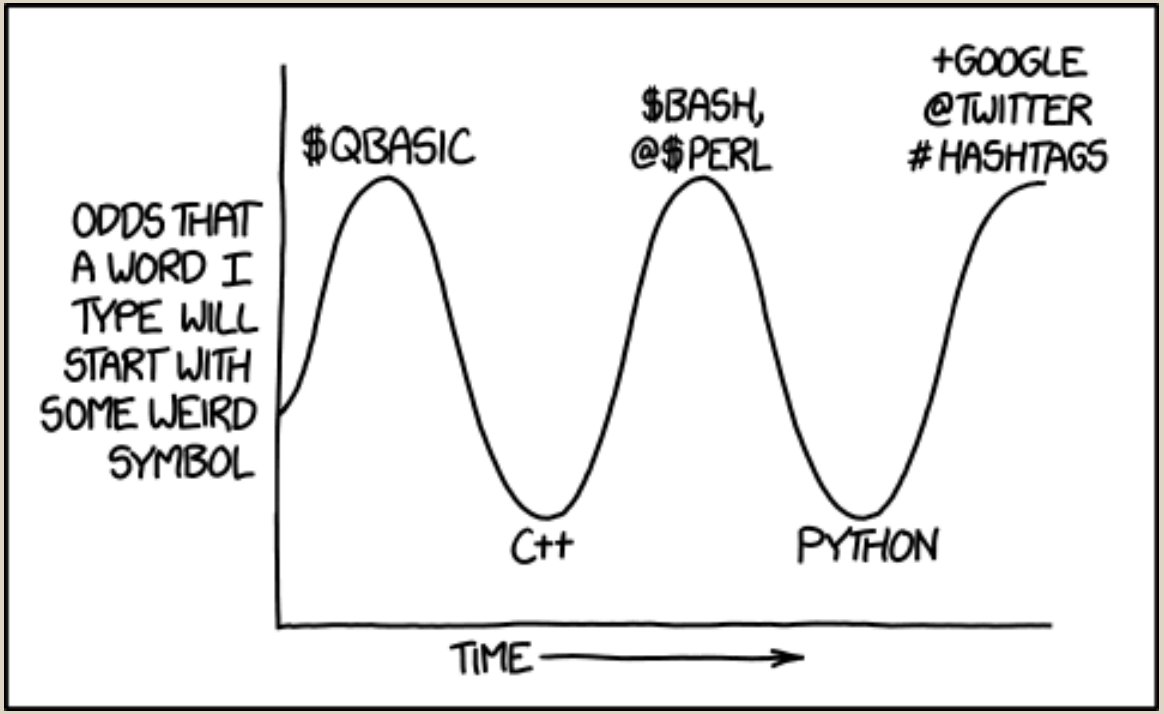
The original said what a thing was for

The copy said what type it was

The compiler already knew the type

Names should contain useful information

We have been round this loop before



Randall Munroe, xkcd.com/1306, CC BY-NC 2.5

Never put in a name what the system already knows.

Your memory holds about four things

4

The modern estimate. Chunks a person can hold at once when they can't rehearse.

7 ± 2

The classic estimate. Miller's "magical number", since revised downwards.

18 sec

How fast it fades. Recall of three letters fell to about 10% after 18 seconds of distraction.

2 sec

The speaking limit. People hold roughly what they can say in two seconds.

A chunk is a unit of meaning. "Webinar" is one chunk. "WBNR" is four.

What this means: three or four real words survive a switch between tools. A string of codes doesn't.

Sources Cowan, Behavioral and Brain Sciences, 2001 · Miller, Psychological Review, 1956 · Peterson & Peterson, Journal of Experimental Psychology, 1959 · Baddeley, Thomson & Buchanan, 1975

You can read “Wbnr”. You can’t remember it.

01	**English is half redundant**	**About 50%, by Shannon’s estimate.** That is why abbreviations can be decoded at all.
02	**Consonants do the work**	**First letters matter most.** Words without vowels stay readable in context, but slower.
03	**Reading isn’t writing**	**Decoding is easy. Reproducing is not.** Was it Wbnr, Webnr or Wbr? If you can’t retype it, you can’t search for it.
04	**Consistency beats cleverness**	**One simple rule, always.** If you must shorten, cut the word off the same way every time.
05	**Recognition beats recall**	**Picking is easier than remembering.** Give people a closed list of whole words to choose from.

Sources Shannon, Bell System Technical Journal, 1951 · Reicher, Journal of Experimental Psychology, 1969 · Ehrenreich & Porcu, 1982 · Streeter, Ackroff & Taylor, 1983

Most HubSpot portals are a mess. It's the names.

Even well-run portals fail the naming checks

8 of 9

No property convention. Portals with no consistent naming across custom contact properties.

5 of 8

No asset convention. Emails, workflows, pages, forms and lists named any old how.

911

The record. Custom contact properties in one portal, with no naming convention.

182

Ours. Custom contact properties in Articulate's own portal. Also no convention.

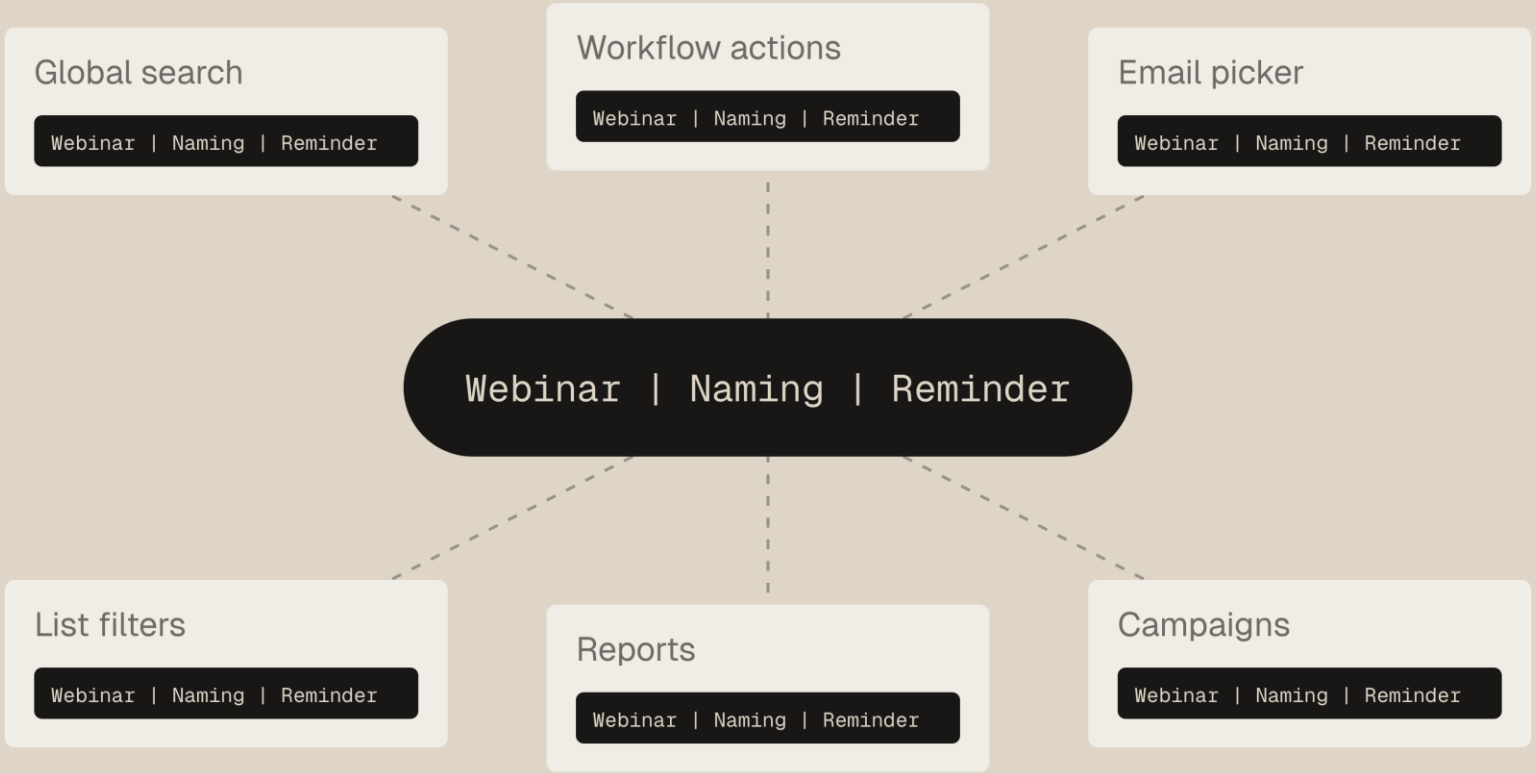
Small sample. Nine portals with a verified Morse result, including our own.

What this means: properties are where naming breaks first, and where it is hardest to fix later.

Sources Morse HubSpot audits, Articulate Marketing, July to November 2026 (checks PRP-05 and MKT-02)

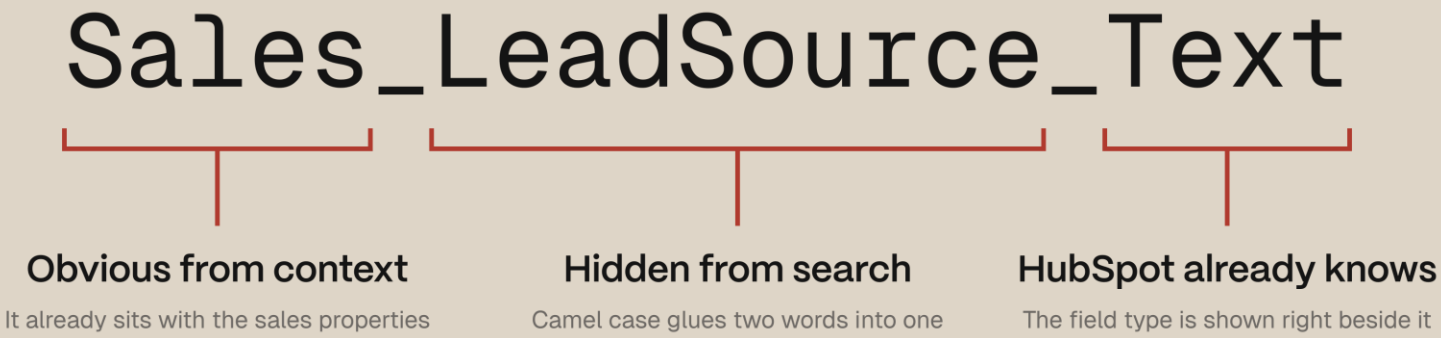
One portal in ten has a convention. One in a hundred keeps it.

The name is the only label that goes everywhere



HubSpot won't enforce it for you.

Three mistakes in one property name



Five rules for names people can find

01	**Use whole words**	**Search matches whole words.** “Renewal” finds “Q4 Renewal” but not “Q4Renewal”. No camel case, no run-together codes.
02	**Three characters or more**	**Shorter codes can’t be searched.** “UK” and “Q4” are invisible to search. Write “GBR” or “2026-Q4”.
03	**General first, specific last**	**A to Z does the filing.** Start with the broadest part so related assets sit together in every list.
04	**Three or four parts**	**People hold a handful of things in mind.** If the pattern needs a manual, nobody will follow it.
05	**Dates that sort**	**Write 2026-11, not Nov 26.** Year first, then month. Alphabetical order becomes date order.

Sources HubSpot Knowledge Base, “Search your CRM” · Articulate testing · ISO 8601 · G. A. Miller, Psychological Review, 1956

MECE

Mutually exclusive. Collectively exhaustive.

Barbara Minto, The Pyramid Principle

Location

Alphabet

Time

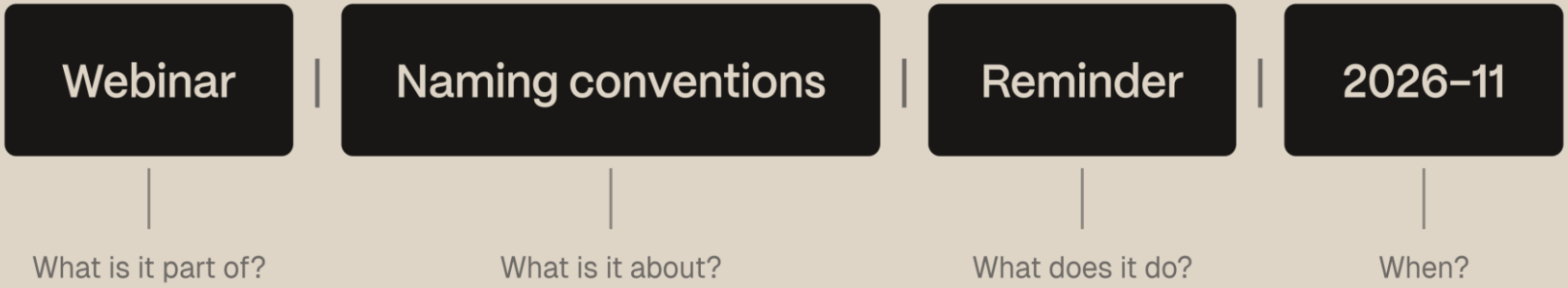
Category

Hierarchy

There are only five ways to organise anything.

Richard Saul Wurman, *Information Anxiety*, 1989

Four parts. Each answers one question.



Five more, just for HubSpot

01	**Skip what HubSpot knows**	**No asset type, owner or data type.** HubSpot shows those in columns and filters. Keep the name for what only you know.
02	**One pattern everywhere**	**Same order for every asset.** Emails, lists, workflows and pages should read alike. Nobody memorises five schemes.
03	**Describe, don't cram**	**Use the description field.** Workflow search reads descriptions too. Put the detail there, not in the name.
04	**Emojis for scanning**	**Not for searching.** A status dot helps the eye. Nobody types an emoji into a search box.
05	**Internal names are forever**	**You can edit a property label.** You can never edit its internal name. Get that one right first time.

Sources HubSpot Knowledge Base: "Organize and manage your workflows", "Create and edit properties" · HubSpot Community

If it's too complicated, people won't use it.

“A little discipline goes a long way.”

Not the Marquis de Sade

Make the right name the easy name

01	**One page, with examples**	**Show, don’t specify.** Ten real names teach the pattern faster than any formula. Keep it where people work.
02	**Clone, don’t type**	**Build correctly named templates.** People copy what is in front of them. Make the thing they copy right.
03	**Give it an owner**	**One person, ten minutes a week.** Sort by created date, fix the strays, have a quiet word.
04	**Pave the cowpaths**	**Start from what your tidiest person does.** A convention people half-follow already will beat one imported from a blog.

Don't rename everything. Start today.

Clean up in three passes

01

Start fresh

Every new asset follows the convention from today. No backlog needed.

02

Rename what’s live

Active workflows, current lists and this quarter’s emails come first.

03

Archive the rest

Mark old assets so they sink out of sight. Delete later, if ever.

The result: a portal that gets tidier every week, with no big-bang project.

Name it for the people who'll use it.

👉 How does your portal score?

Book a Morse audit of your HubSpot portal

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Thank you!