Client Name

Sales Process
Month 2023

Client Logo

SALES Overview

01 **Sales at Client Name**
Importance of process and data integrity.

02 **HubSpot Process**
Overall process for moving deals through the pipeline.

03 **Client Onboarding**
Contracting, invoicing and client setup.

04 **Reporting**
Dashboard summary of deal status and closings.

01: Sales at Client Name

The Sales Process

Client uses HubSpot to track and monitor leads, deals in progress and outcomes. It is required that all deals all leads and deals are entered into the HubSpot Deal Pipeline.

All closed deals follow a standard contracting and invoicing process outlined in section 03 of this document.

Data Intregrity

Any employee in a sales role or acting in a sales capacity (the Deal Owner) is responsible for ensuring the integrity of data in the HubSpot Deal Pipeline for accurate reporting. Key data are: Contact Information, Company Information and Deal Source.

Completion of all critical data are outlined in the HubSpot Deal Pipeline Procedures.

02: HubSpot Process

DEAL PIPELINE

Unengaged/ HubSpot Leads

Triage/ Discovery/Set

Presentation/ Pitch

Waiting on Decision Maker

Contract Pending/Out

WON

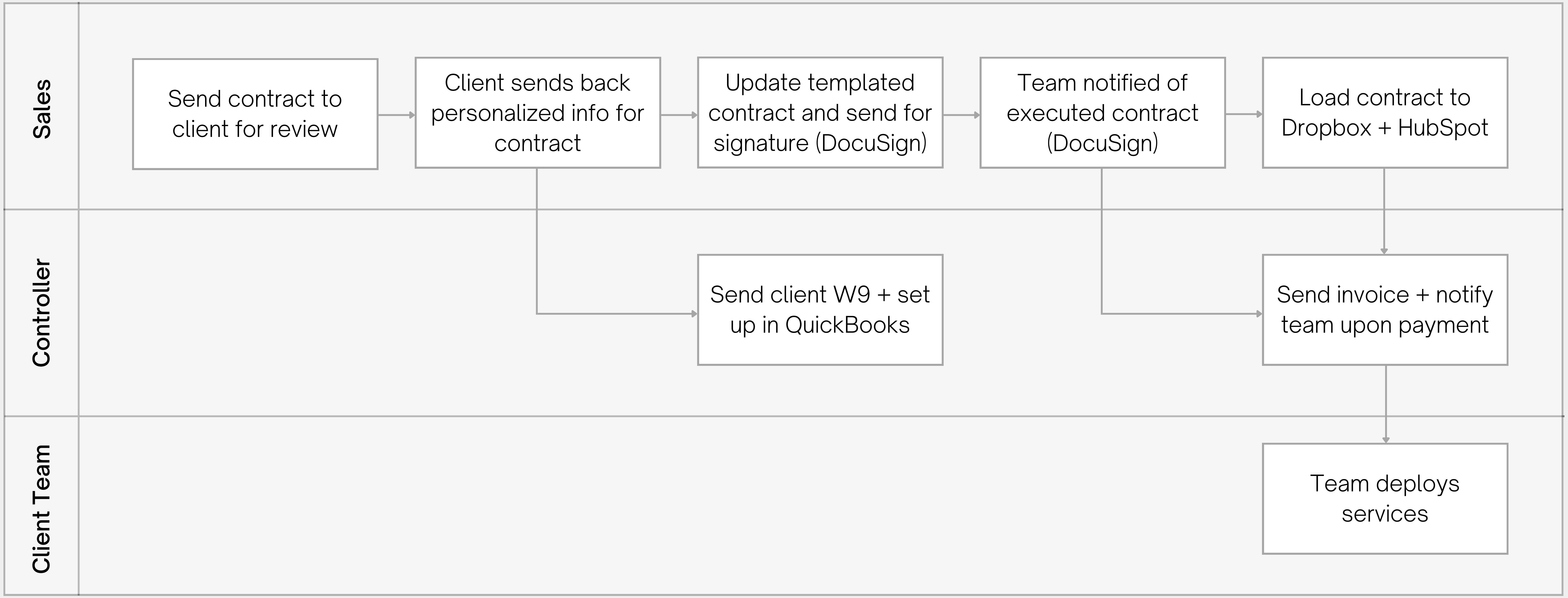
LOST/ Email Follow Up

- Leads enter the Deal Pipeline and are claimed by the Deal Owner.
- The Deal Owner is responsible for shepherding the deal through each HubSpot phase and ensuring data quality and accuracy.
- All deals are required to be closed, regardless of outcome.

Detailed steps for this process are outlined in the HubSpot Deal Pipeline Procedures.

03: Client Onboarding

All deals follow a standard contracting and invoicing process. Vertical specific steps are outlined on the next page.



03: Vertical Specific Client Onboarding

DATA/LEADS

New Clients

- Contract is sent and executed
- Insertion Order (IO) is sent to capture data order
- Client is sent W9 and set up in QuickBooks
- Controller and CIO are notified once contract and IO are executed
- All documents loaded to Dropbox and HubSpot

New + Existing Clients

- IO is generated on behalf of client
- Invoice is sent to client for IO
- Team is notified by Controller once payment is received
- CIO fulfills data order and sends to client via FTP
- CIO notifies team of order fulfillment

MARKETING SERVICES

- Contract is sent and executed
- Client is sent W9 and set up in QuickBooks
- Invoice is sent to client for payment per contract
- Team is notified by Controller once payment is received

PROJECT WORKS STARTS

- Controller tracks remaining payments via Google Sheet
- If additional services are requested, Controller sends new invoices and follows same process.

04: Reporting

HubSpot Sales Dashboards

Sales reporting is captured in HubSpot. The data is aggregated directly from the Deal record and its lifecycle in the Deal Pipeline. Reporting can be found in the top bar navigation by clicking *Reports > Dashboards > Overall Sales Reports.* **It is critical that all deal data is accurate and up to date to ensure reporting quality.**

Reporting is in place to track:

- Lead Source
- Calls Booked
- Deals Won
- Deal Revenue vs. Revenue Goal

Detailed steps for this process are outlined in the HubSpot Dashboard Reporting document.

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