

# Client Name



[System Name] Procedures Guide  
Date



# PROCEDURES

## Overview

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### **01 Data Ownership + Integrity**

Importance of process and data integrity.

### **02 HubSpot Process**

Overall process for moving deals through the pipeline.

### **03 Navigating to the Deal Pipeline**

How to find all deals in HubSpot.

### **04 Deal Overview**

Overview of critical data fields to be completed.

### **05 Key Deal Fields**

How to locate and update Close Date, Deal Source, and Deal Stage.

### **06 Contacts + Companies Fields**

How to locate and update Contacts and Companies information.

### **07 Deal Activities**

Overview of types of deal activities that are captured.

### **08 Logging Calls + Meetings**

How to capture deal activities, statuses and outcomes.

### **09 Deal Closure**

How to move a deal to a closed status.

# **01: Data Ownership + Integrity**

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

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 these procedures.

# 02: HubSpot Process

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## DEAL PIPELINE

Unengaged/  
HubSpot  
Leads


Triage/  
Discovery/  
Set

Presentation/  
Pitch

Waiting on  
Decision  
Maker

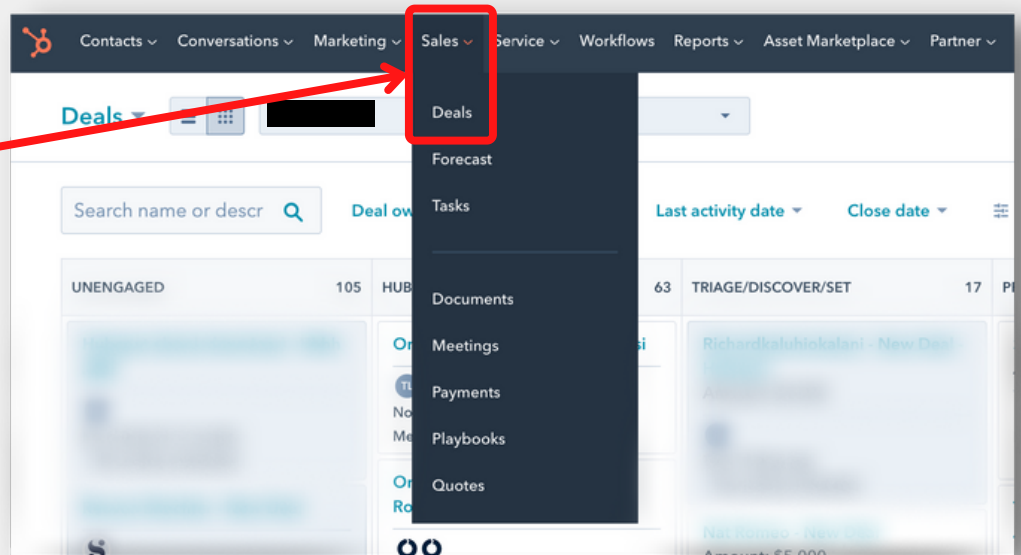
Contract  
Pending/Out

WON  
——  
LOST/  
Email Follow  
Up

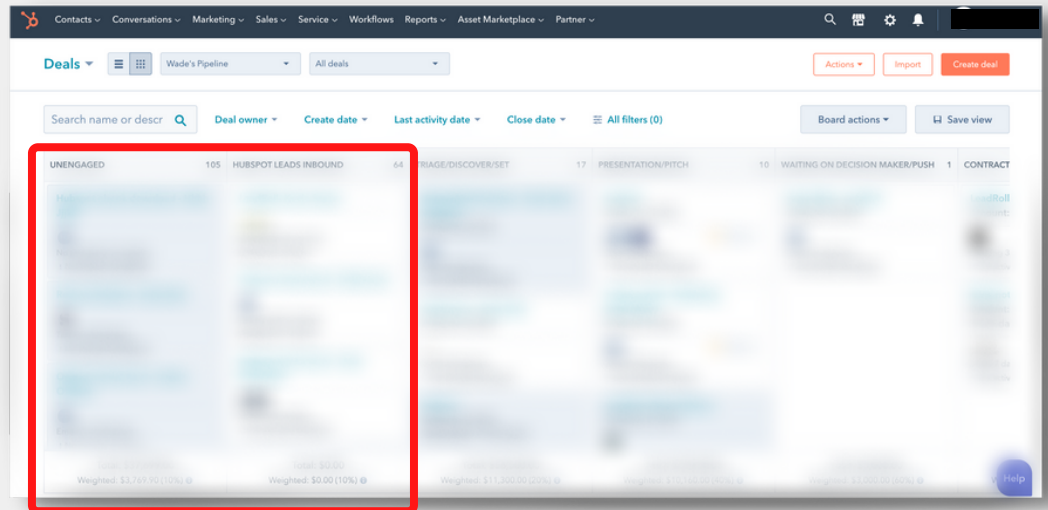
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- Leads enter the Deal Pipeline and are claimed by the Deal Owner.
  - The Deal Owner is responsible for shepherding the deal through each HubSpot phase and ensuring data quality and accuracy.
  - All deals are required to be closed, regardless of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

# 03: Navigating to the Deal Pipeline

From the top navigation bar, select *Sales > Deals*.



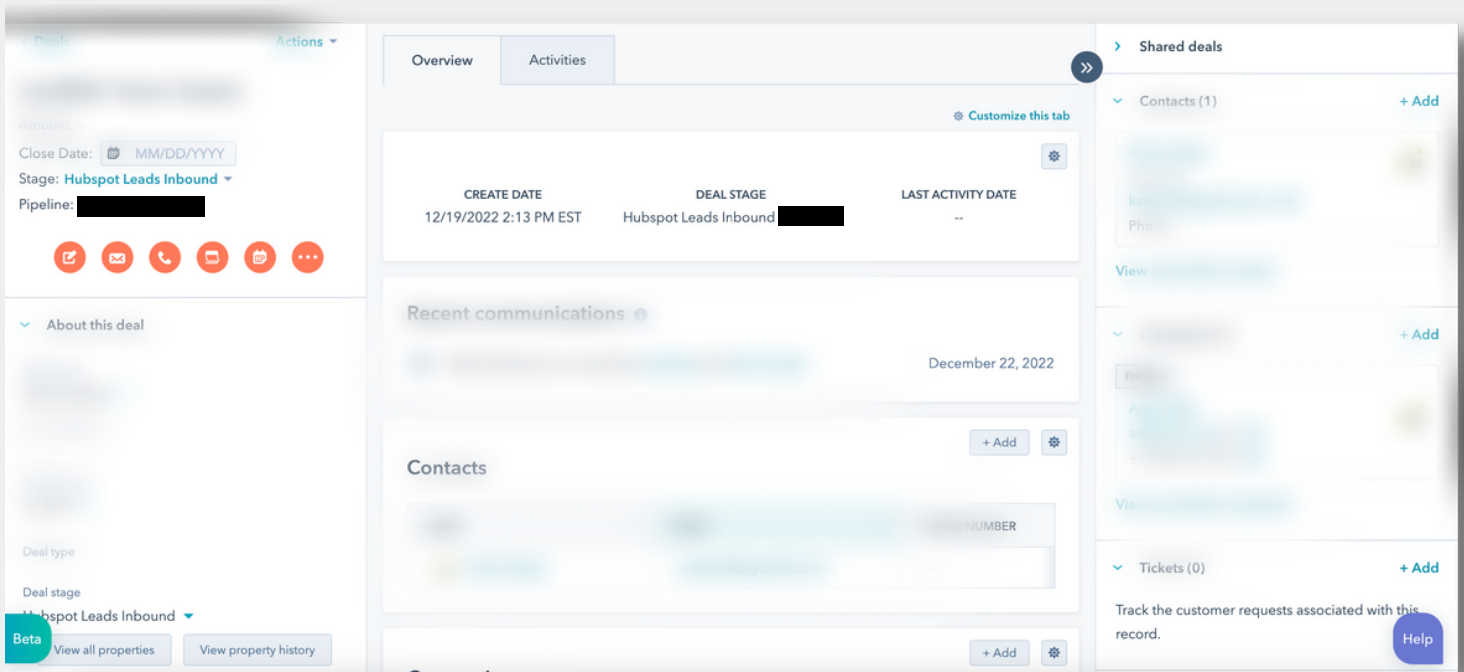
The full Deal Pipeline will display.



Leads new to the pipeline will be in the *Unengaged* or *HubSpot Leads Inbound* columns.

# 04: Deal Overview

There are three main sections within a deal. Data in all sections must be kept accurate and up to date.



Contains deal info such as Close Date, Stage, Deal Owner, and Lead Source.

Contains all activity for the deal such as calls, meetings and notes.

Contains client info such as Contact, Company and attachments.

# 05: Key Deal Fields

*Close Date* is located in the upper left of the Deal Overview.

No date should be entered unless the deal is complete (either won or lost).



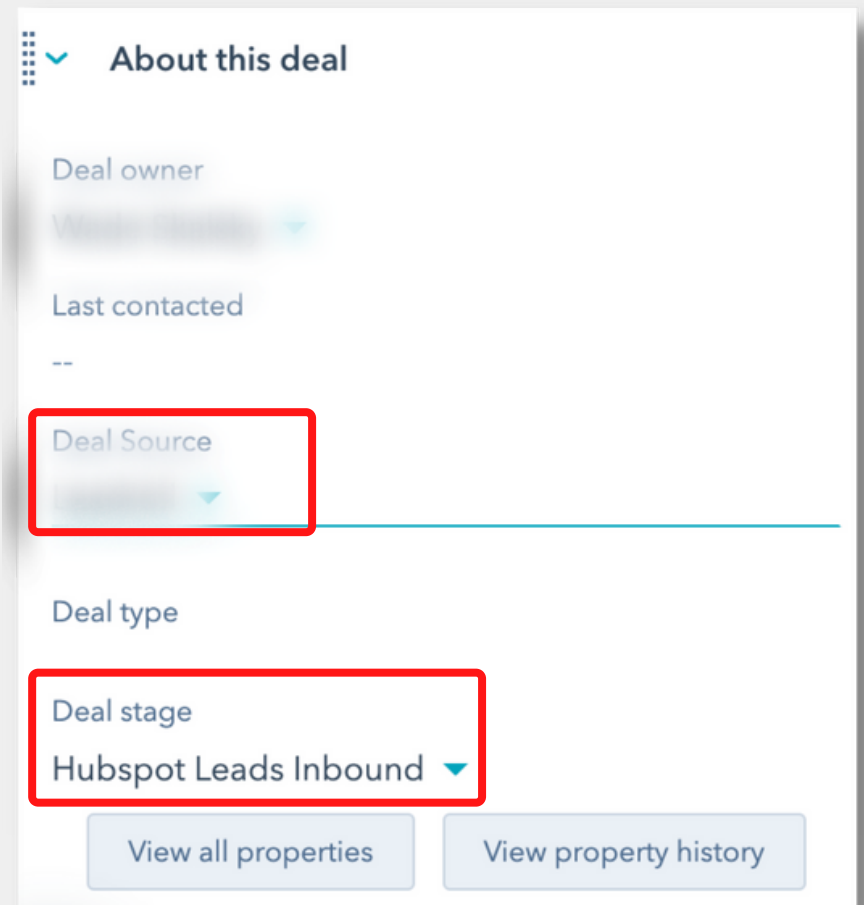
Close Date:

Stage: **Hubspot Leads Inbound** ▾

Pipeline:

[✎](#) [✉](#) [☎](#) [📄](#) [📅](#) [⋮](#)

*Deal Source* will either populate or should be manually selected.



✓ **About this deal**

Deal owner  
[Name]

Last contacted  
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Deal Source  
[Dropdown]

Deal type

Deal stage  
**Hubspot Leads Inbound** ▾

[View all properties](#) [View property history](#)

*Deal Stage* populates based on the deal's place in the pipeline. Always verify the stage is correct.

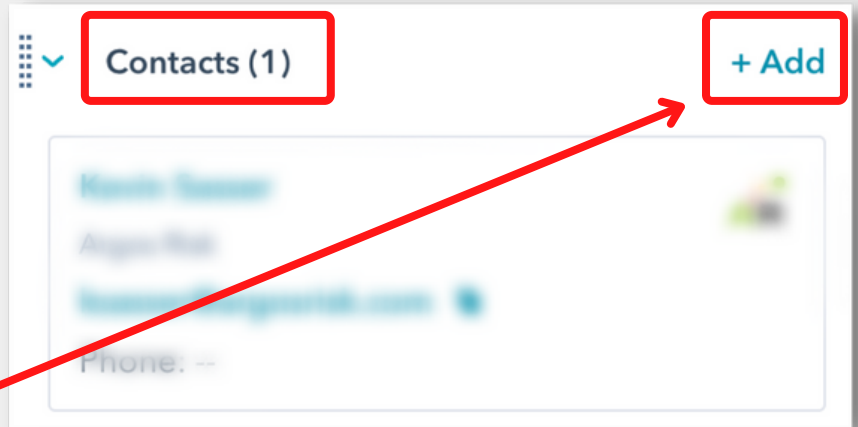
# 06: Contacts + Companies Fields

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*Contacts* is located in the upper right of the Deal Overview.

Contact information will either populate or should be manually entered.

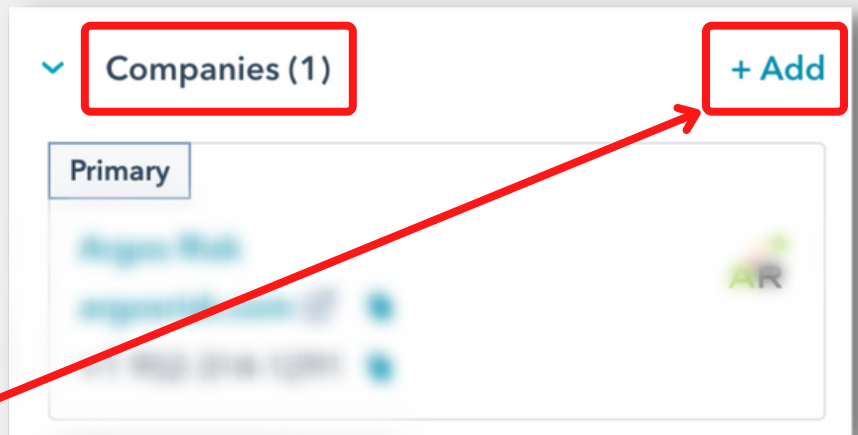
Contact information can be added here.



*Companies* is located under *Contacts*.

Company information will either populate or should be manually entered.

Company information can be added here.

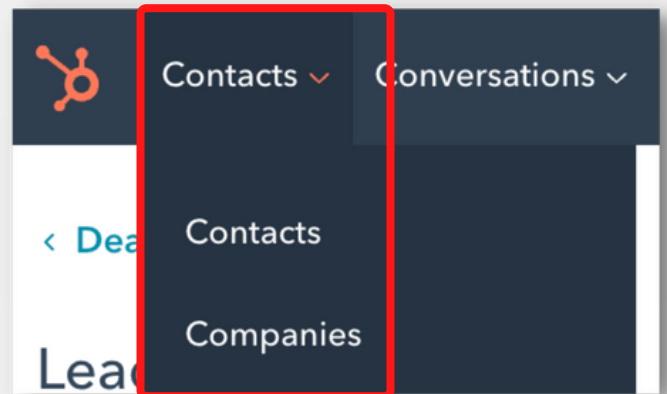




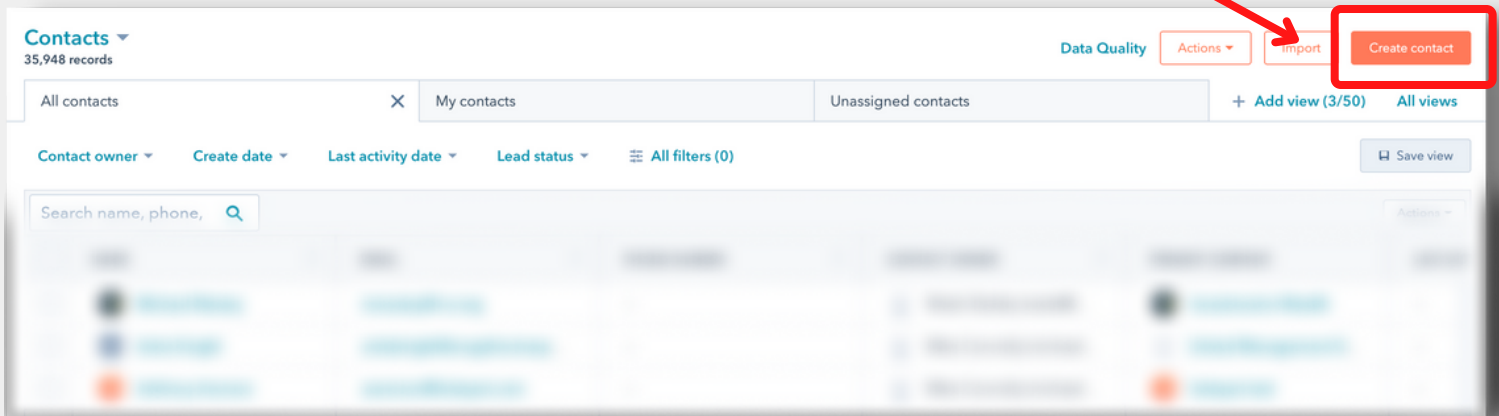
# 06: Contacts + Companies Fields

*Contacts* and *Companies* can also be added from the top navigation bar by selecting:

- *Contacts* > *Contacts*
- *Contacts* > *Companies*



Once selected, all existing *Contacts* or *Companies* will display. A new *Contact* or *Company* can be added by selecting *Create contact* or *Create company*.



(This example is for *Contacts*. A similar screen will appear when *Companies* is selected.)

# 07: Deal Activities

The screenshot displays the 'Deal Activities' interface. At the top, there are two tabs: 'Overview' and 'Activities', with 'Activities' being the active tab. Below the tabs is a search bar labeled 'Search activities' with a magnifying glass icon. To the right of the search bar is a 'Collapse all' button with a downward arrow. Below the search bar is a horizontal menu with six items: 'Activity', 'Notes', 'Emails', 'Calls', 'Tasks', and 'Meetings'. The 'Activity' item is highlighted with a red rectangular box. Below this menu are three filter dropdowns: 'Filter activity (11/20)', 'All users', and 'All teams'. The main content area is titled 'Upcoming' and contains a single activity card. The card has a right-pointing chevron icon on the left, followed by the text 'Meeting - Intro Call McGRAW by Wade Skalsky' and the date 'Dec 22, 2022 at 11:00 AM EST'. Below the title, there are two lines of text: 'Please share anything that will help prepare for our meeting.' and 'Wade Skalsky is inviting you to a scheduled Zoom meeting.' Below the 'Upcoming' section is a section titled 'December 2022'. This section contains two activity cards. The first card has the title 'Deal activity' and the date 'Dec 19, 2022 at 2:13 PM EST'. Below the title is the text 'Deal moved to Hubspot Leads Inbound by Automation Platform. View details' with a right-pointing chevron icon. The second card has the title 'This deal was created' and the date 'Dec 19, 2022 at 2:13 PM EST'.

Ongoing deal activity is captured in the *Deal Activities* section.

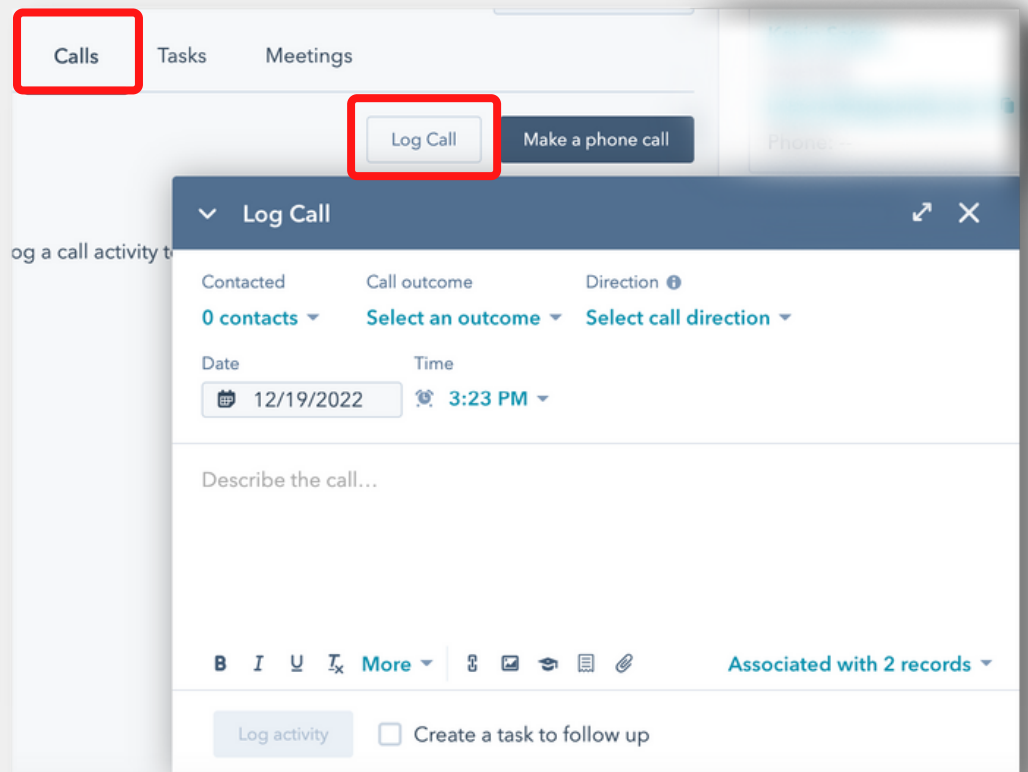
- *Activities*: Populated running log of deal activities
- *Notes*: Optional usage for Deal Owner
- *Emails*: Messages to prospect synced with email account and populated
- *Calls*: All phone calls to prospect are required to be logged
- *Tasks*: Optional usage for Deal Owner
- *Meetings*: All meeting with prospect are required to be logged

# 08: Logging Calls + Meetings

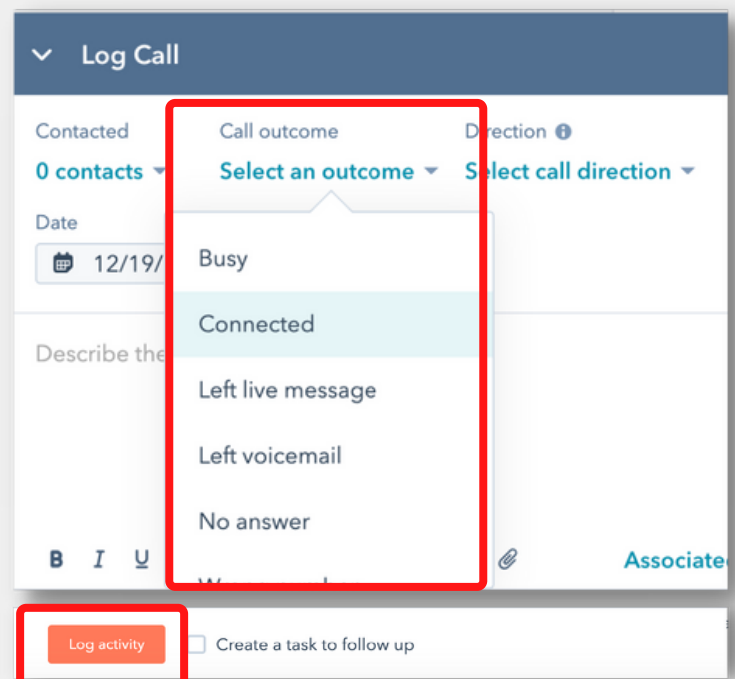
## Calls

From the *Calls* tab, select *Log Call*.

A pop out form will display to log the call information.



Complete all fields and ensure a *Call outcome* is selected.



Hit the *Log activity* button to save.

# 08: Logging Calls + Meetings

## Meetings

From the *Meetings* tab, select *Log Meeting*.

A pop out form will display to log the meeting information.

Tasks **Meetings**

Log Meeting Create Meeting

▼ Log Meeting

Attendees Outcome  
0 attendees ▼ Select meeting outcome ▼

Date Time Duration  
01/02/2023 7:43 PM ▼ 15 Minutes ▼

Describe the meeting...

B I U *I*x More ▼       Associated with 2 records ▼

Log activity  Create a task to follow up

Complete all fields and ensure a meeting *Outcome* is selected.

▼ Log Meeting

Attendees Outcome  
0 attendees ▼ **Select meeting outcome ▼**

Date  
01/02/2023

Describe the meeting...

B I U *I*x More ▼       Assoc

Log activity  Create a task to follow up

(No value)  
Scheduled  
Completed  
Rescheduled  
No Show  
Canceled

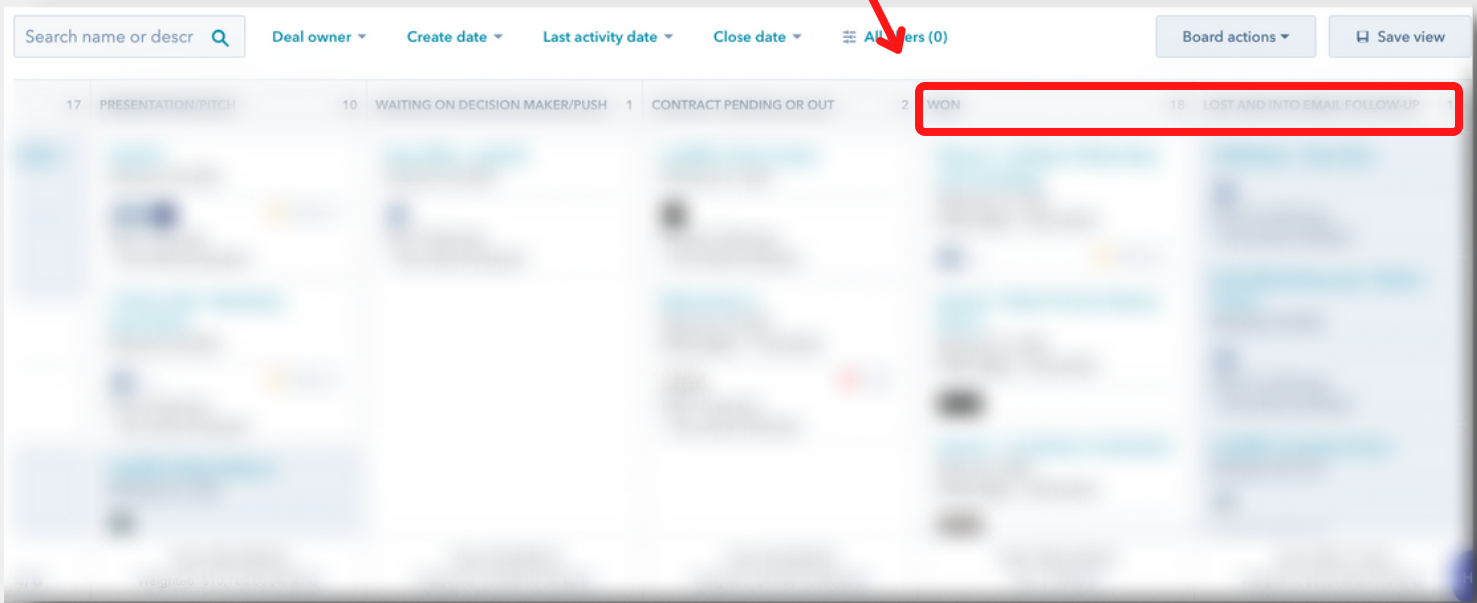
Hit the *Log activity* button to save.

# 09: Deal Closure

Regardless of outcome, the deal must enter a closed status.

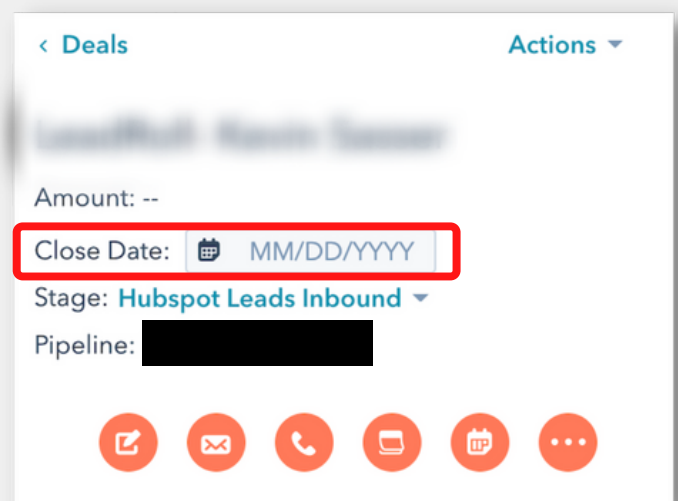
Drag the deal or change the *Stage* field to either:

- *Won*
- *Lost and Into Email Follow Up*



*Close Date* is located in the upper left of the Deal Overview.

Enter a *Close Date* to finalize the deal outcome.



**End of Document**

