Client Name

[System Name] Procedures Guide
Date

Client Logo

PROCEDURES Overview

01: Data Ownership + Integrity

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

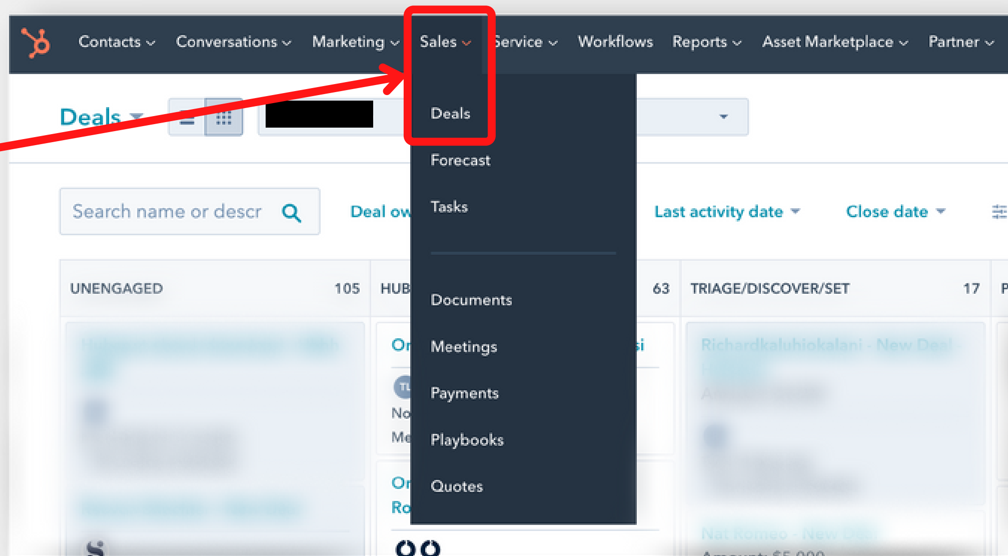
DEAL PIPELINE

Unengaged/ HubSpot Leads	Triage/ Discovery/ Set	Presentation/ Pitch	Waiting on Decision Maker	Contract Pending/Out	WON LOST/ Email Follow Up

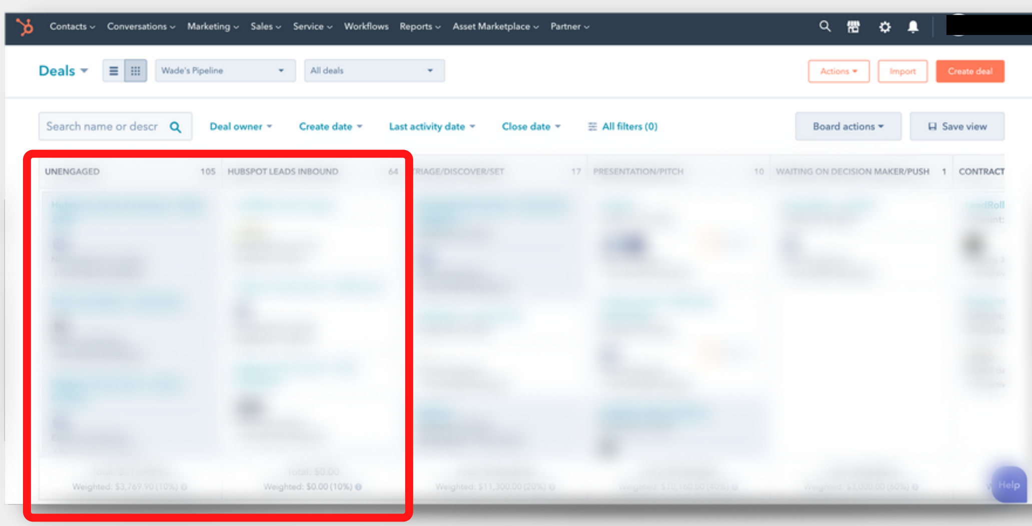
- Leads enter the Deal Pipeline and are claimed by the Deal Owner.
- The Deal Owner is responsible for shepherding the deal through each HubSpot phase and ensuring data quality and accuracy.
- All deals are required to be closed, regardless of outcome.

03: Navigating to the Deal Pipeline

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



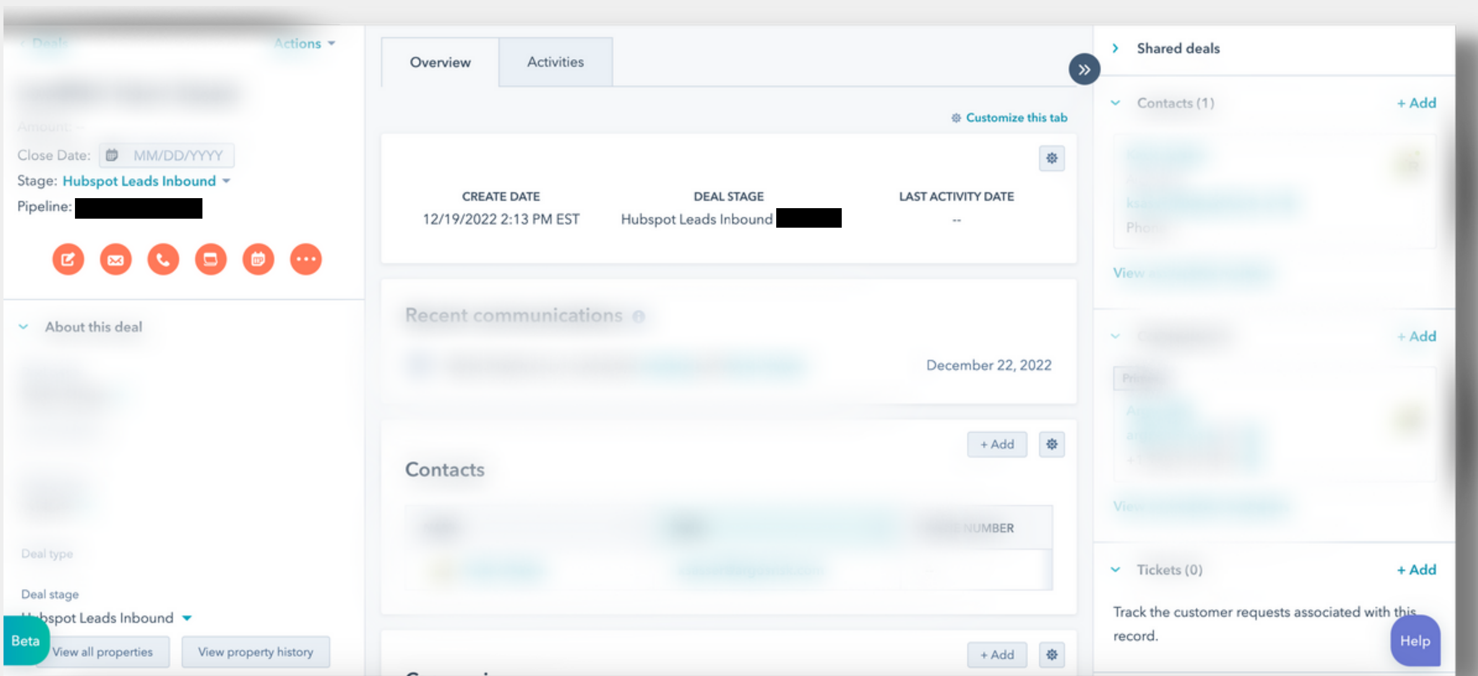
The full Deal Pipeline will display.



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.

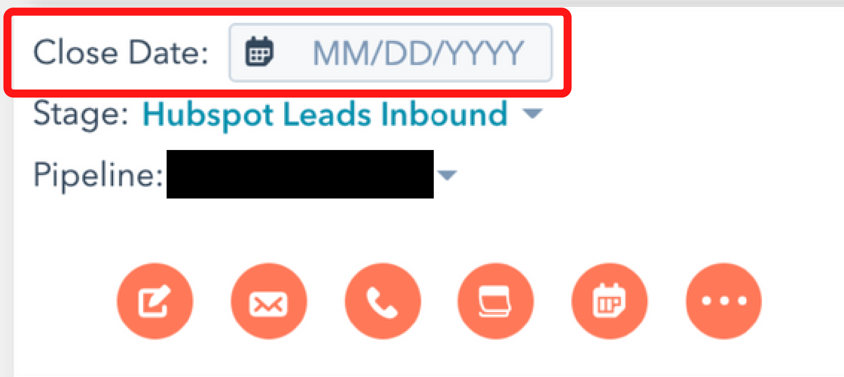
Contains all activity for the deal such as calls, meetings and notes.

Contains client info such as Contact, Company and attachments.

05: Key Deal Fields

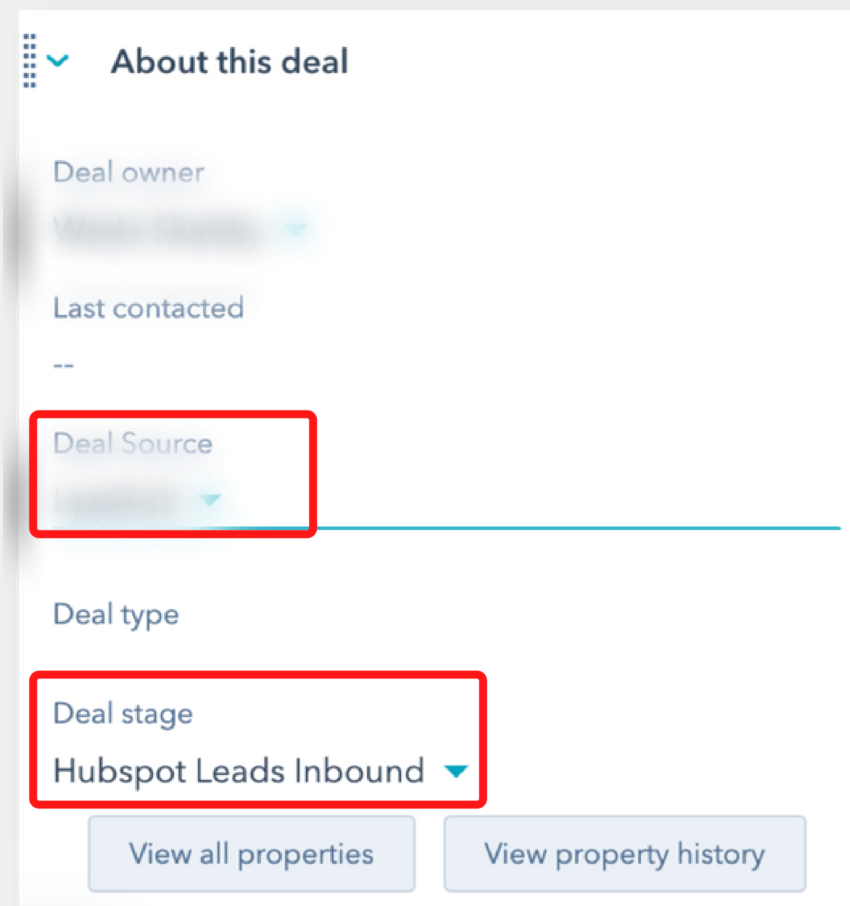
Close Date is located in the upper left of the Deal Overview.

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



Deal Source will either populate or should be manually selected.

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

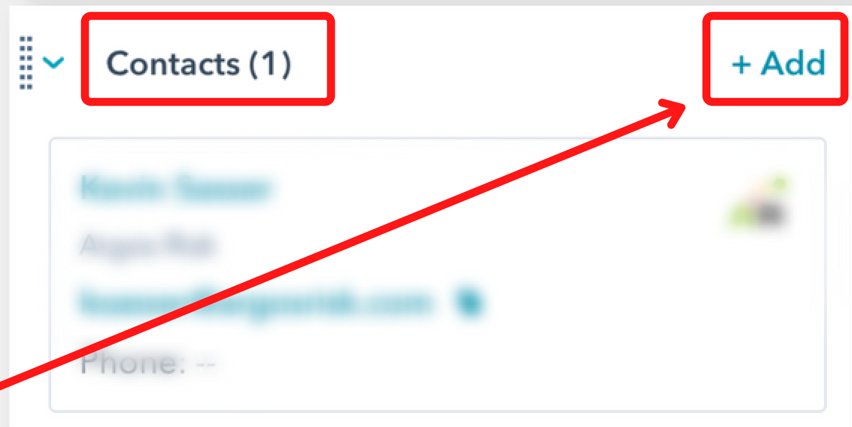


06: Contacts + Companies Fields

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

Contact information will either populate or should be manually entered.

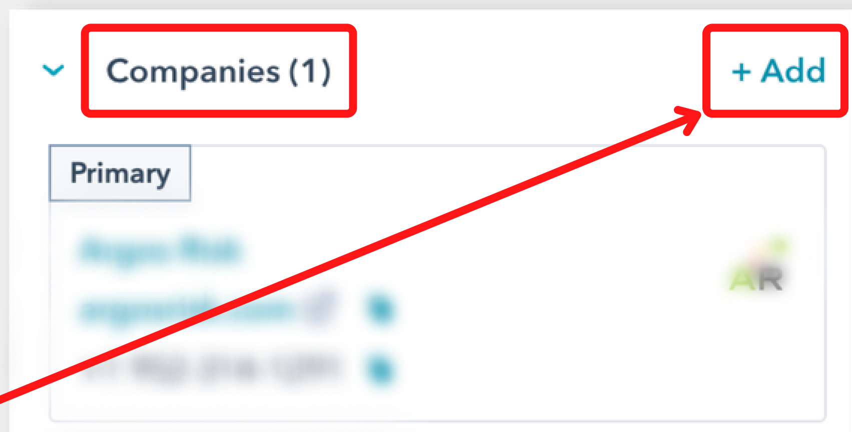
Contact information can be added here.



Companies is located under *Contacts*.

Company information will either populate or should be manually entered.

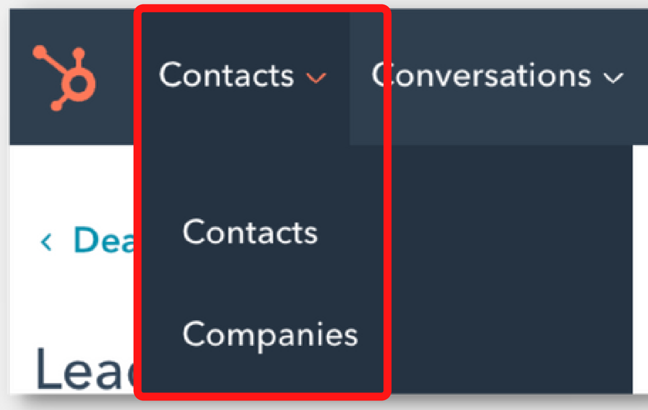
Company information can be added here.



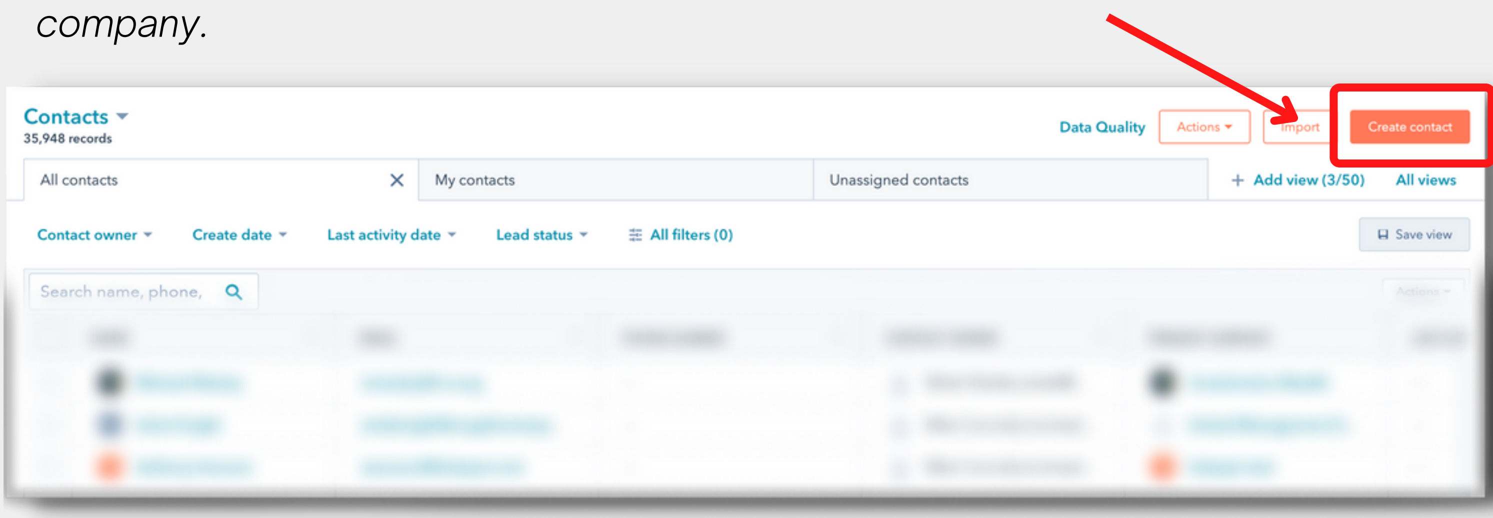
06: Contacts + Companies Fields

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

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

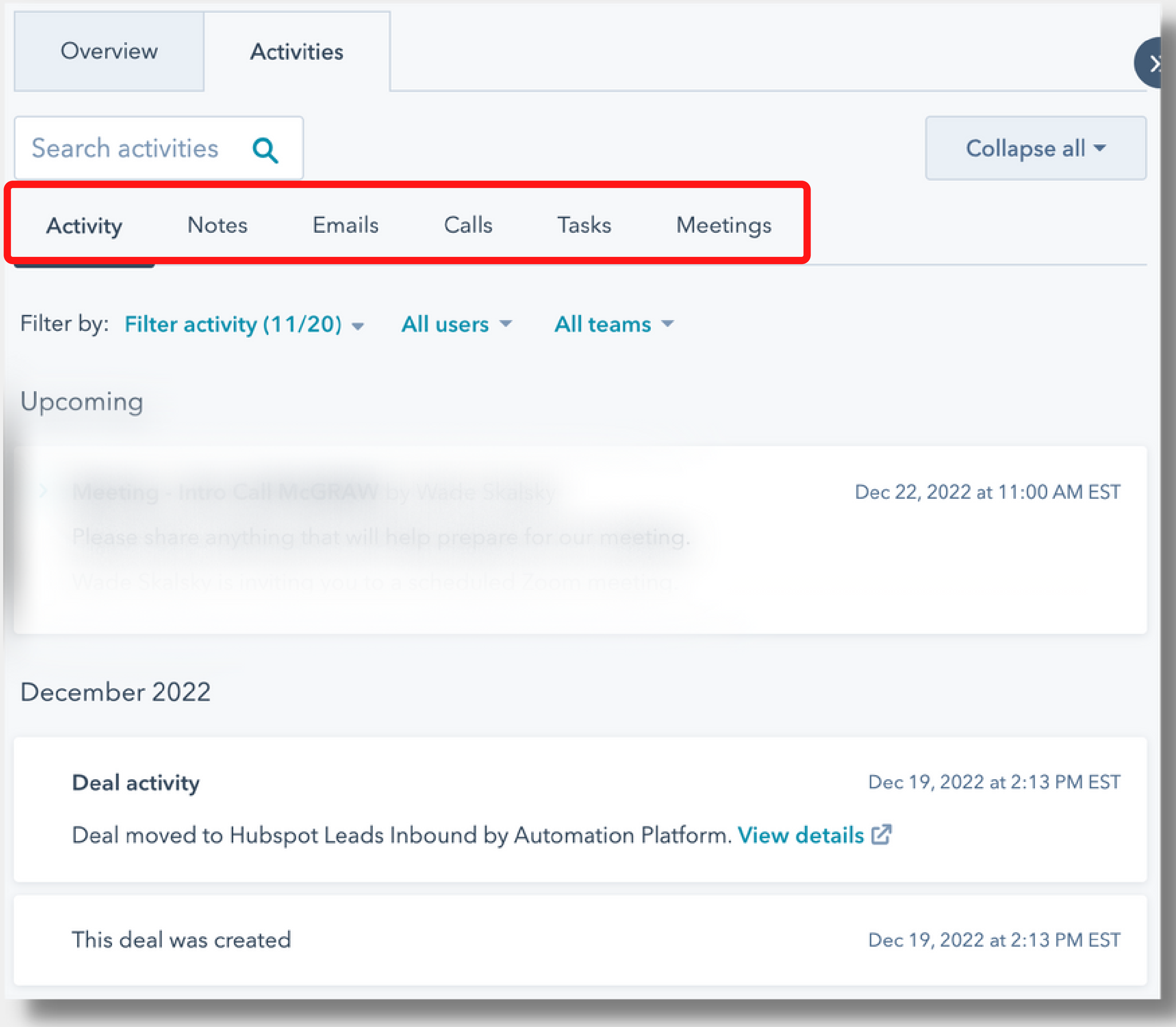


Once selected, all existing Contacts or Companies will display. A new Contact or Company can be added by selecting *Create contact* or *Create company*.



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

07: Deal Activities



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

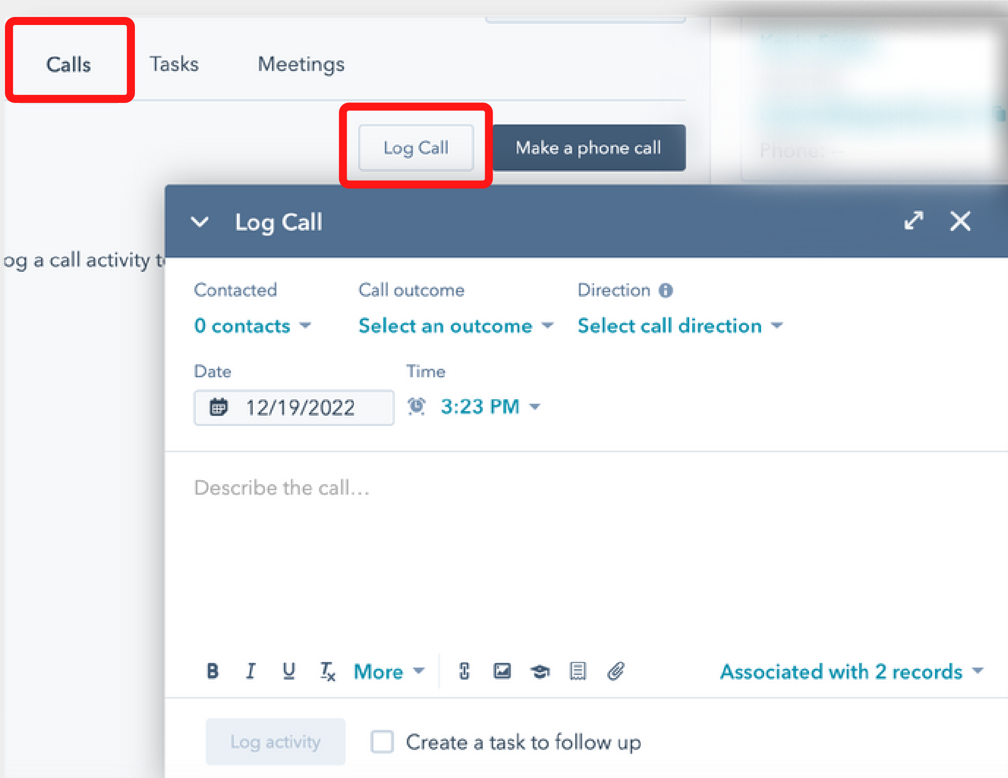
- *Activities:* Populated running log of deal activities
- *Notes:* Optional usage for Deal Owner
- *Emails:* Messages to prospect synced with email account and populated
- *Calls:* All phone calls to prospect are required to be logged
- *Tasks:* Optional usage for Deal Owner
- *Meetings:* All meeting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

08: Logging Calls + Meetings

<u>Calls</u>

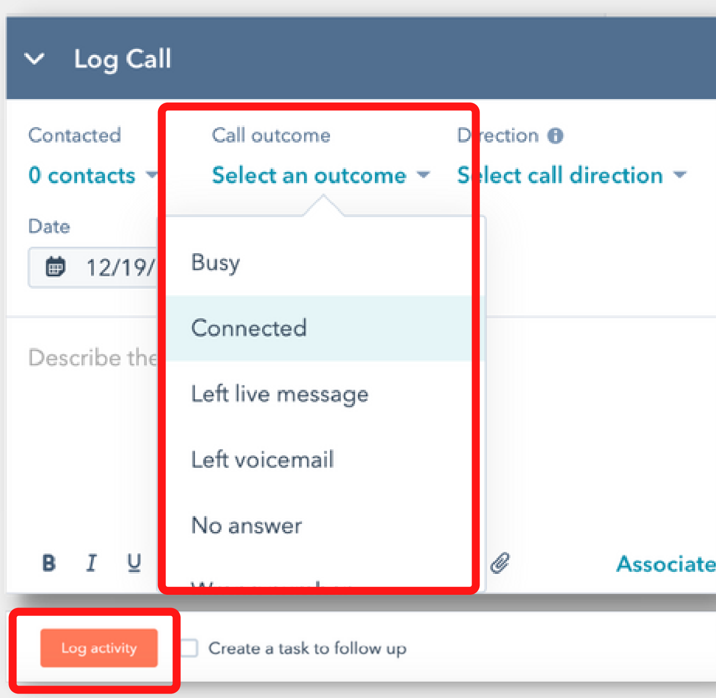
From the *Calls* tab, select *Log Call.*

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.

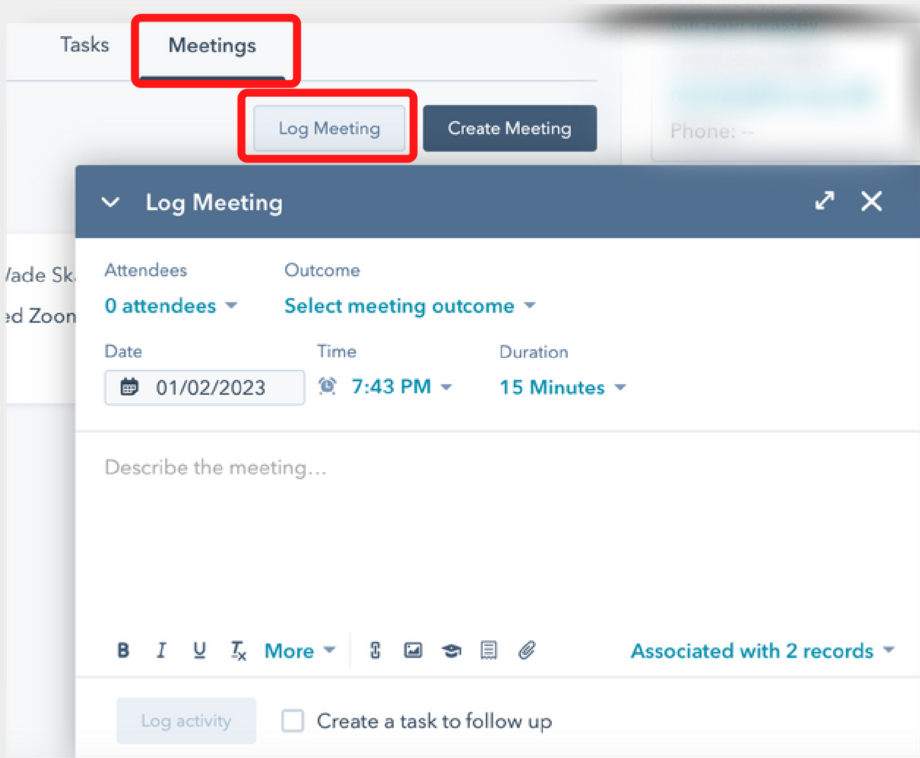


08: Logging Calls + Meetings

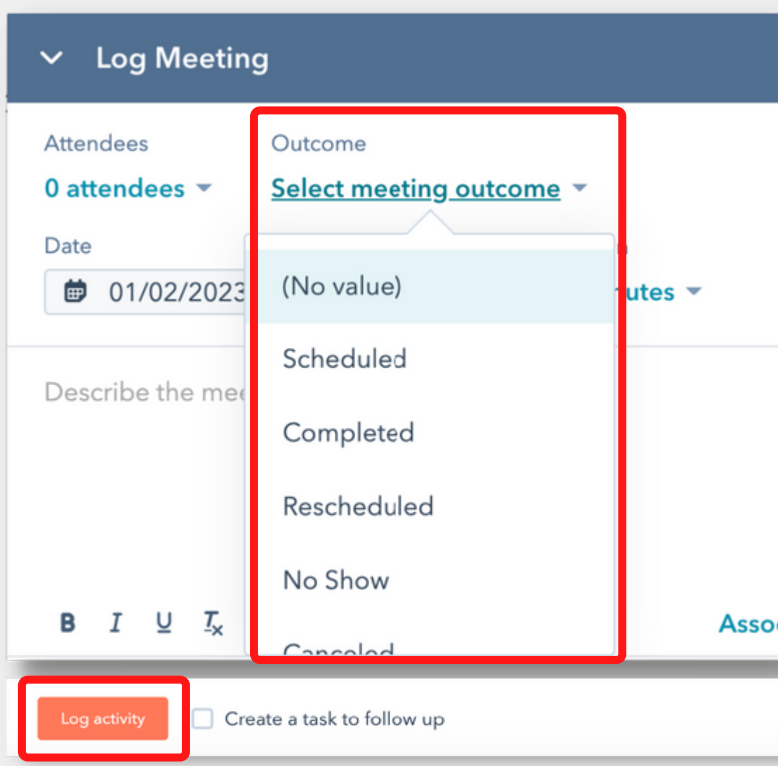
<u>Meetings</u>

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

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



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



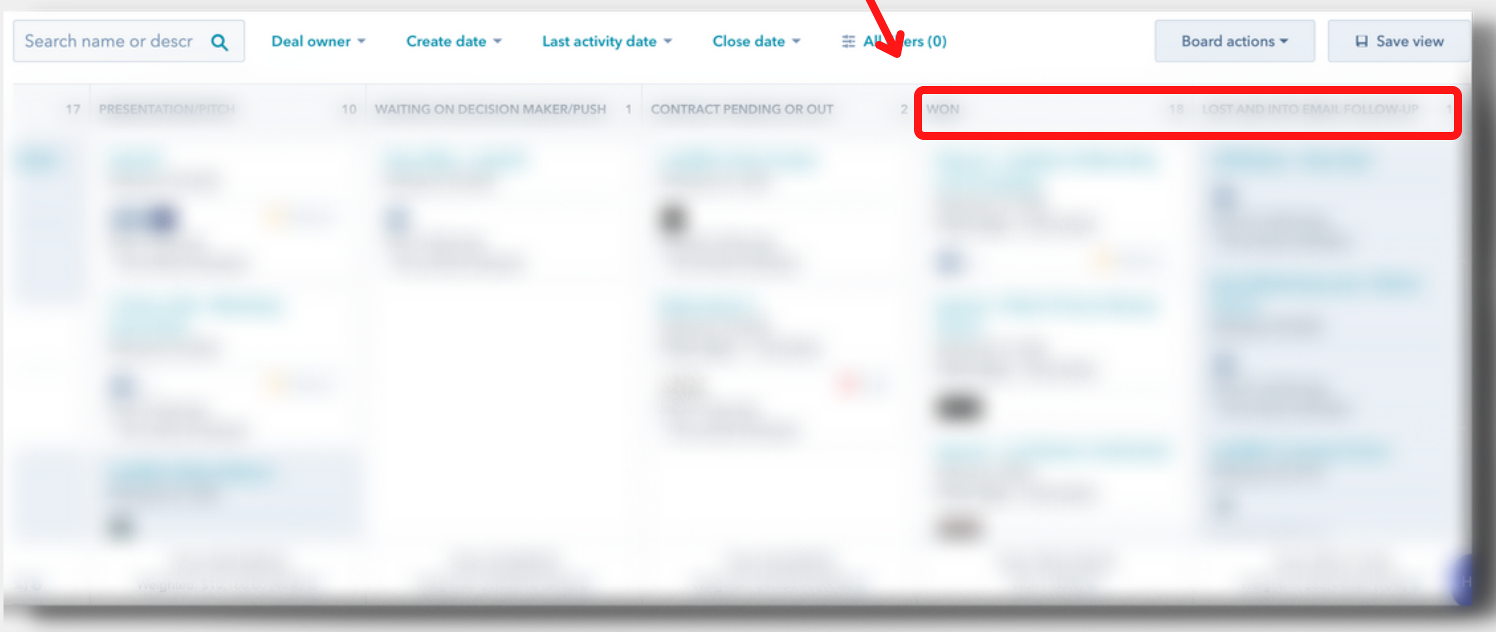
Hit the *Log activity* button to save.

09: Deal Closure

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

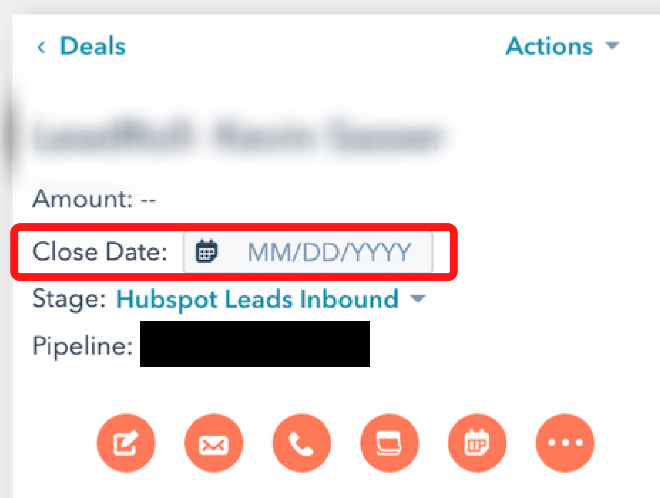
Drag the deal or change the *Stage* field to either:

- *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.



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