

How To Get Your Sales Process into HubSpot with *Ease*



HOW TO USE THIS GUIDE



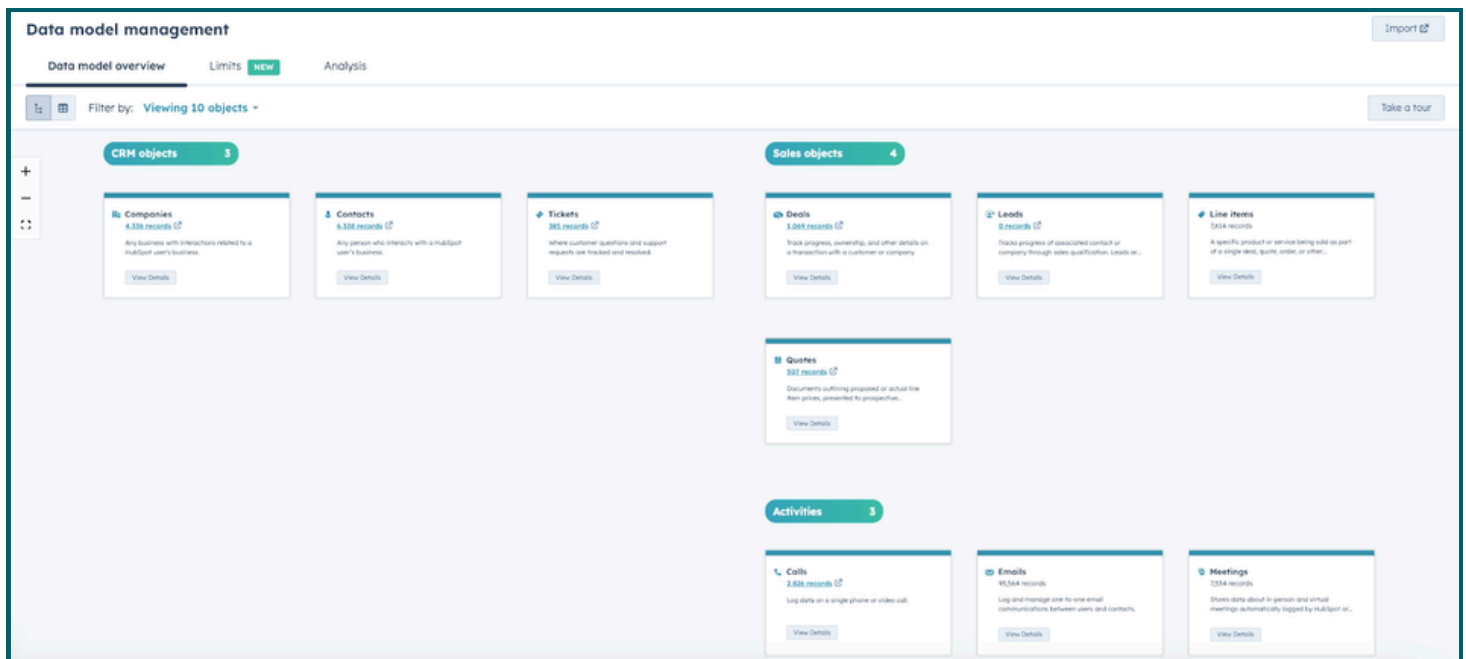
This Standard Operating Procedure (SOP) document outlines Evenbound's suggested customer journey for using HubSpot. It provides detailed descriptions of each stage of the journey, from the initial contact creation to the final closed-won status.

The SOP highlights the precise definitions for each stage, the corresponding marketing and sales actions to be taken, and the criteria for progressing contacts through the customer journey. By following this process, teams can ensure a structured and efficient approach to managing customer relationships and optimizing the sales pipeline within HubSpot.

Note: This SOP serves as a starting point for a structured customer journey in HubSpot. Keep in mind that each HubSpot portal and business's sales process is unique, so you should adapt this guide to your specific needs rather than adhere to it rigidly.

Data Model

Before we get started, let's talk about the HubSpot Data Model tool. The native HubSpot Data Model tool is a reflection of all our systems, processes, and data within the CRM. It should be specific and customized to our operational needs within this SOP.



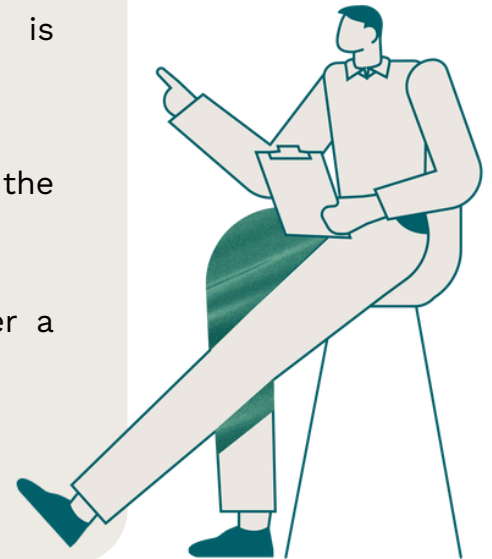
KEY:

This key will help you better understand the following instructions by clarifying which actions require manual input, which can be automated, and where customization is necessary to tailor the process to your team's needs.

Manual: An action that must be taken manually within the HubSpot user interface by a HubSpot user.

Automated: An action that may be automated by either a default HubSpot automation or workflow.

Customize: Fill in highlighted text with information specific to your team.



CUSTOMER JOURNEY DEFINITIONS



To effectively implement your sales process into HubSpot, you'll need to outline your customer journey definitions and lifecycle stages. This ensures each stage is clearly defined and aligned with both marketing and sales efforts within HubSpot.

1. HubSpot Lifecycle Stages

- **Subscriber:** a contact who has opted in to hear more from you by signing up for your blog or newsletter.
 - *Automatically set by the following form submissions:*

Example Subscriber Form

Example Subscriber Form

- **Lead:** a contact or company that has converted on our website or through some other interaction beyond an email subscription or blog sign-up.
 - *Automatically* set by default for a contact or company record created through HubSpot CRM UI or the following form submissions:

Example Lead Form

- **Marketing Qualified Lead:** a contact or company that has shown clear interest or engagement with your marketing efforts (submitted a form, reached certain lead score criteria, engaged with key content pieces, etc.), indicating they are ready to be "marketed to."
 - *Automatically* set by the following form submissions:

Example Marketing Qualified Lead Form

Customize lifecycle stage based on submissions

Choose a lifecycle stage for any records created or updated by submissions to this form. [Learn more about the limitations of this setting.](#)

Set lifecycle stage to

Marketing Qualified Lead ▼

Note: This setting will override the default Lifecycle stage in [Lifecycle stage settings](#), but it will never move a contact or company back to a previous lifecycle stage.

- **Sales Qualified Lead:** a contact or company that fits one of your ideal customer profiles (ICP) and is ready to talk to sales.
 - *Automatically* set when contact or company is associated with a scheduled meeting activity, requested a quote, etc.

- **Opportunity:** a contact or company that is associated to an open deal in the [deal pipeline].
 - *Automatically* set by HubSpot's lifecycle stage settings.

The screenshot shows the 'Automation' settings in HubSpot. It includes a section for 'Sync lifecycle stages' which is checked. Below this, there are three settings for setting lifecycle stages based on specific events:

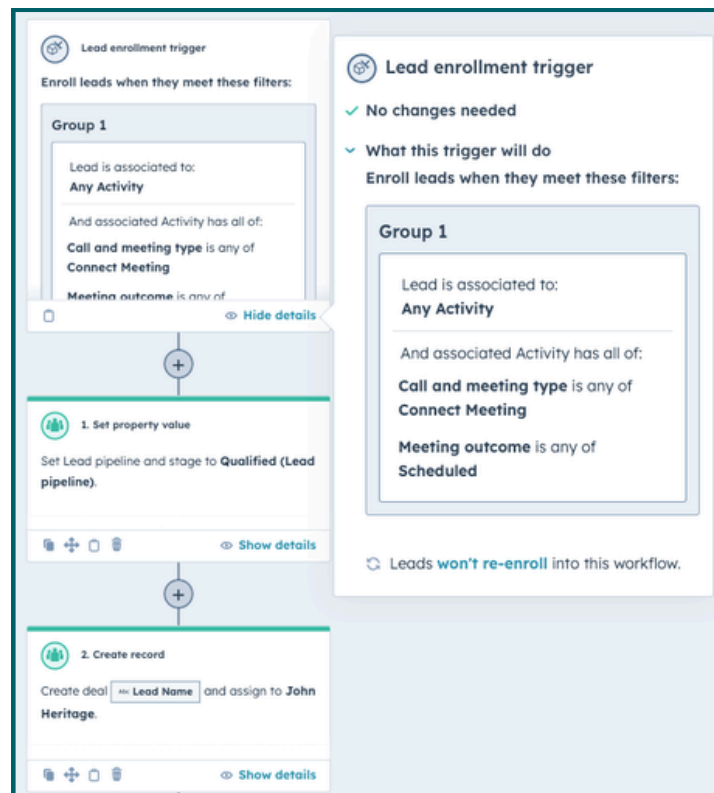
- Set lifecycle stage when a contact or company is created:** This setting is checked. The dropdown menu is set to 'Lead'.
- Set lifecycle stage when a deal is created:** This setting is checked. The dropdown menu is set to 'Opportunity'.
- Set lifecycle stage when a deal is won:** This setting is checked. The dropdown menu is set to 'Customer'.
- Set lifecycle stage when a lead is associated:** This setting is unchecked.

- **Customer:** a contact or company associated with a closed won deal.
 - *Automatically* set by HubSpot's lifecycle stage settings.
- **Evangelist:** a contact or company that has given a 5-star review.
 - *Manually* set by [person or team].
- **Other:** a contact or company that does not fit any of the above stages.
 - *Manually* set by [person or team] or *automatically* set by the following form submissions:

Example Other Form

2. HubSpot **Lead Record** Pipeline Stages

- **New** — Lead records are **automatically** created when the lifecycle stage is set to **‘Marketing Qualified Lead’** and have not yet been contacted by sales.
- **Attempted** — Leads records are **automatically** moved into this stage based on when a user sends an email or calls a lead.
- **Connected** — Leads records are **automatically** moved into this stage when a lead replies to an email, logs a connected call outcome, or logs a completed meeting outcome.
- **Qualified** — Leads are **manually** or **automatically** moved into this stage when **qualification criteria** is met. This could include a specific, high-intent activity such as a ‘discovery’ or ‘connect’ meeting is scheduled:



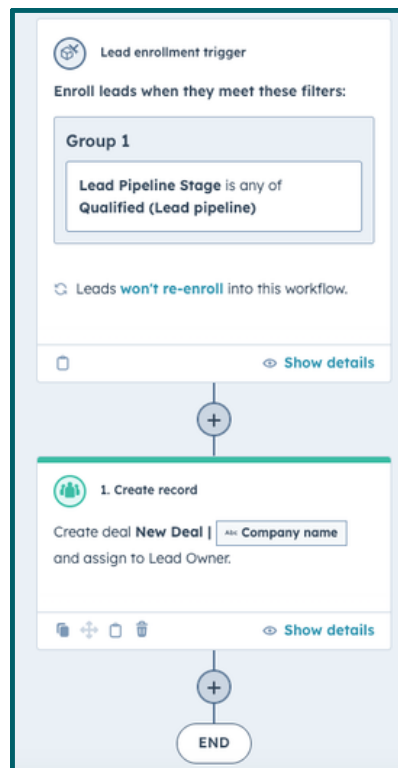
- **Disqualified** — Leads are **manually** moved into this stage when the disqualification reason is known:
 - **[Disqualified reasons]**

3. HubSpot Deal Record Pipeline Stages

Deals						
All deals + Add view (1/50) All views Demo Sales Pipeline Deal owner Create Date Last Activity D... Close Date Advanced filters (0) Show Insights Board options						
Search name or description Board options						
IDENTIFIED NEED	DISCOVERY COMPLETED	SOLUTION PROPOSED	UNDER EVALUATION	NEGOTIATING TERMS	CLOSED WON	CLOSED LOST
Divape Amount: \$15,000 Close date: 09/18/2024 Urgent No activity for 3 days No activity scheduled	Oyope Amount: \$10,000 Close date: 09/17/2024 Urgent No activity for 3 days No activity scheduled	Biogtag Amount: \$100,000 Close date: 09/18/2024 Urgent High Value No activity for 3 days No activity scheduled	Kanoodle Amount: \$10,000 Close date: 09/18/2024 Urgent ICP Fit No activity for 3 days No activity scheduled	Blogspan Amount: \$5,000 Close date: 09/14/2024 ICP Fit No activity for 3 days No activity scheduled	Photolist Amount: \$5,000 Close date: 08/22/2024 Shuffletag Amount: \$5,000 Close date: 04/15/2024	Jetpulse Amount: \$2,500 Close date: 10/05/2024 Katz Amount: \$2,500 Close date: 01/22/2024
Cogilith Amount: \$2,500 Close date: 11/21/2023 Overdue No activity for 3 days No activity scheduled	Thoughtmix Amount: \$5,000 Close date: 09/05/2024 Overdue No activity for 3 days No activity scheduled	Trudeo Amount: \$30,000 Close date: 09/17/2024 Urgent High Value No activity for 3 days No activity scheduled	Livehubo Amount: \$2,500 Close date: 10/08/2023 Overdue No activity for 3 days No activity scheduled	Tagpad Amount: \$5,000 Close date: 12/23/2024 No activity for 3 days No activity scheduled	Agimba Amount: \$15,000 Close date: 02/19/2024 Quimba Amount: \$5,000 Close date: 05/21/2024	Roodel Amount: \$100,000 Close date: 01/15/2024 High Value
Ploxnyx Amount: \$10,000 Close date: 10/04/2024 ICP Fit No activity for 3 days No activity scheduled	Yakijo Amount: \$50,000 Close date: 09/26/2024 Overdue High Value No activity for 3 days No activity scheduled	Myrm Amount: \$2,500 Close date: 09/12/2024 Urgent No activity for 3 days No activity scheduled	Babbleset Amount: \$5,000 Close date: 12/19/2024 No activity for 3 days No activity scheduled	Tagfly Amount: \$15,000 Close date: 09/22/2024 No activity for 3 days No activity scheduled	Thoughtbeat Amount: \$1,000 Close date: 11/25/2023 Devify Amount: \$2,500	Flashset Amount: \$15,000 Close date: 09/16/2024 Dabjam Amount: \$15,000 Close date: 09/16/2024
Total: \$67,500 Weighted: \$13,500	Total: \$95,000 Weighted: \$38,000	Total: \$245,000 Weighted: \$147,000	Total: \$75,000 Weighted: \$58,400	Total: \$30,001 Weighted: \$21,001	Total: \$97,501 Won (30%)	Total: \$371,500 Lost (70%)

- **Identified Need (20%)** — The stage where a specific need or problem has been identified within the potential customer's organization.
 - Deal records are **automatically** created in this stage when a lead record is set to 'qualified' by the sales team. Required deal properties include:

- Pipeline
- Deal Stage
- Deal Owner
- Deal Type



- **Discovery Completed (40%)** — At this stage, the discovery process has been completed, and the potential customer has been further qualified as a good fit for your product or service.
 - Deal records are **manually** moved into this stage after a 'Discovery' meeting has been completed and the prospect's requirements are understood. Required deal properties include:
 - *Close date*
 - *Amount*
- **Solution Proposed (60%)** — The stage where a formal solution has been proposed to the potential customer based on the identified needs and discovery process.
 - Deal records are **manually** moved into this stage after a proposal or recommendations have been provided to address the customer's needs.
- **Under Evaluation (80%)** — At this stage, the potential customer is evaluating the proposed solution and determining if it fits their needs and budget.
 - Deal records are **manually** moved into this stage when the prospect is actively reviewing and considering the solution.
- **Negotiating Terms (90%)** — The stage where terms and conditions, including pricing and contract details, are being negotiated with the potential customer.
 - Deal records are **automatically** moved into this stage once the customer has expressed interest in moving forward and is associated with a pending quote.
- **Closed Won (100%)** — The deal has been successfully closed, and the customer has agreed to purchase the product or service.
 - Deal records are **automatically** moved into this stage when associated with an accepted quote or signed contract.
- **Closed Lost (0%)** — The deal was not successful, and the potential customer decided not to move forward with the purchase.
 - Deal records are **manually** moved into this stage when a closed lost reason is known.

Need Assistance Setting Up Your HubSpot Sales Process?

At [Evenbound](#), we know that no two businesses are the same. If you need further guidance [tailoring HubSpot](#) to meet your specific needs, our team is here to help. Whether it's refining your sales stages, creating custom workflows, or optimizing your marketing and sales alignment, our team has the expertise to set up your HubSpot portal for success!

[Contact us](#) today to schedule a free consultation and take the next step toward streamlining your customer journey with HubSpot.

