Implementing Your Sales Process with the HubSpot CRM

Why is the HubSpot CRM important to your sales process?

But what does it mean to “set up your CRM?” What does it mean to set up your **CRM for growth?**

HubSpot CRM Design

Understanding how the HubSpot CRM is designed will give you insight into where your data will live, how it will be organized, and where you will be working each day.



Key components of HubSpot CRM

- Objects
- Records
- Properties

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- Records
- Properties
- Deals
- Deal Stages
- Pipelines

How to implement your sales process with HubSpot CRM

Building Your Sales Process with HubSpot CRM

1. Lifecycle stages
2. Lead statuses
3. Deal stages

Lifecycle stage

A property that helps you identify and track your contacts and companies

Lifecycle stages

- ✓ Subscriber
- ✓ Lead
- ✓ Marketing Qualified Lead
- ✓ Sales Qualified Lead
- ✓ Opportunity
- ✓ Customer
- ✓ Evangelist
- ✓ Other

Example:

The moment you create a deal for a contact or company, it's lifecycle stage is automatically updated to Opportunity, and the moment you move that deal to Closed Won, it's Lifecycle stage is updated to Customer and the "became a customer date" property is time stamped.

Lead Status

A property to track leads on their way to becoming Opportunities

The next step is to define the trigger point where a lead becomes a recognized revenue **opportunity for you.**

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Identify which steps you need to track to the move opportunity through the pipeline to Closed Won or Closed Lost.

Pro Tip:

It may be helpful to think backwards from Closed Won.

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Keep your stages in past tense.