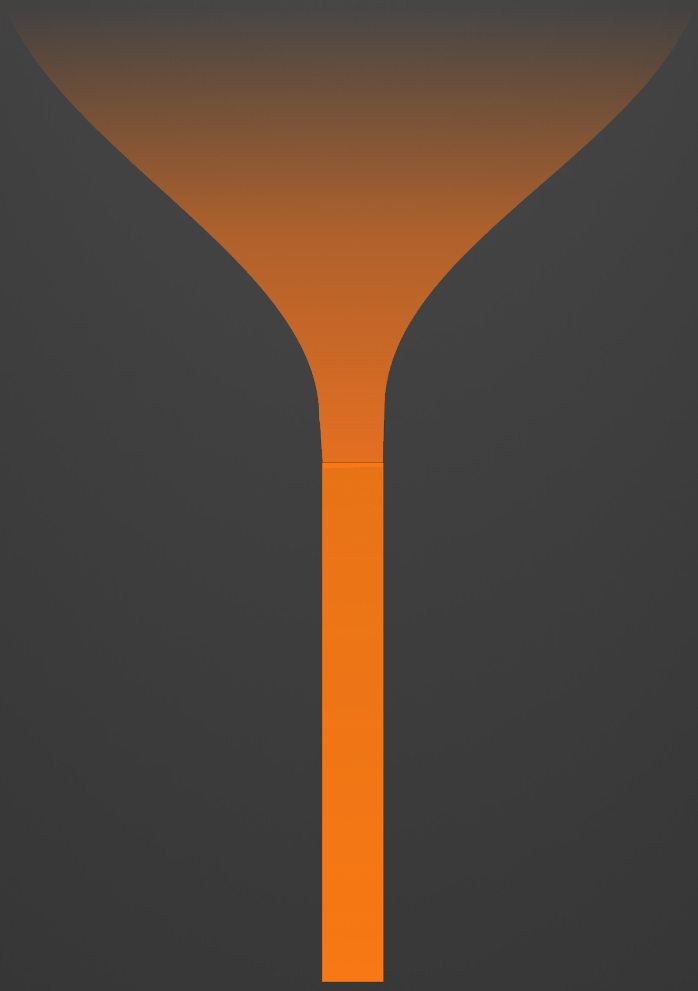
HubSpot CRM Process Map



HubSpot

Tools and Terminology

A common understanding of tools and terminology in play is essential for success. Please visit knowledge.hubspot.com for more information.



Lifecycle Stages

Lifecycle Stage is a default HubSpot property, designed to designate where contacts are in your acquisition funnel. Each stage represents a **transition down the funnel**.
The stages, in order (from top of the funnel first to bottom of the funnel last), are: Subscriber, Lead, Marketing Qualified Lead, Sales Qualified Lead, Opportunity, Customer, Evangelist, and Other. For more detailed information on and definitions of each stage, please see this article.



HubSpot Owner

Any HubSpot account users with access to Contacts can be designated as contact or company owners using the HubSpot Owner contact property. Owners can be set manually or automatically and there can only be one owner per contact or company.



Contacts

Contacts is an object within HubSpot that represents all of the individuals who may be a prospect or potential opportunity that you need to track in HubSpot. You can store various information for an individual contact, such as phone numbers, addresses, titles, and roles on contact properties.



Companies

Companies is an object within HubSpot that represents all of the organizations who may be a prospect or potential opportunity that you need to track in HubSpot. You can store various information for a company, such as phone numbers, addresses, titles, and industry on company properties.



View

HubSpot CRM can show you slices of your Contacts, Companies, and Deals based on certain criteria so you can easily view only the data that matters to you. There are two building blocks for creating custom views in HubSpot CRM: filtering your data using any property on that object, and adding columns to the view.



Lead Rotator

As your company grows and your sales team matures, assigning leads manually doesn't scale. Automatically assign Contacts to HubSpot Owners based on rules you set up

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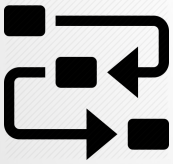
Lead Status

Lead Status is a default contact and company property that indicates where a contact or company is within a buying cycle as a lead. This property allows you to be more specific about a contact or company's qualification as a lead. You can customize the Lead Status property with values specific to your sales process.



Deal

Deals are an object created when a contact or company has shown a high probability or purchasing a good or service; colloquially known as an opportunity. The deal represents the specific value, product/service, and probability of closing of that sale. By adding deals, you are also building your "pipeline," which will contribute to your deals forecast. When a deal is created the lifecycle stage of any associated Contacts and Companies will change to 'Opportunity'.



Deal Stage

Deal Stages allow you to categorize and track the progress of the deals that you are working on within HubSpot CRM. Each Deal Stage has a probability associated that indicates the likelihood of closing deals marked with that Deal Stage.



Closed Won/Closed Lost

When the stage of a deal is changed to 100% (Closed Won), the lifecycle stage of any associated Contacts and Companies will change to 'Customer'. When the stage of a deal is changed to 0% (Closed Lost), the lifecycle stage of any associated Contacts and Companies will remain as 'Opportunity'.



Tasks

Tasks is an object within HubSpot that represents an action that needs to be completed in the future, and can be assigned to yourself or to others. By assigning a task, both you and the assignee will receive email notifications about due dates, and can mark the task as completed once your task is completed.



Deal Forecast

The Deal Forecast is a projection of the amount of revenue that will be generated, within a given timeframe. To calculate this metric, each deal with a Close Date within the timeframe selected, is multiplied by its respective deal stage probability and then summed into a total estimate.

HubSpot

Sales Process Example

Lead Sources
Online
Trade Shows
Cold Source

Lead Sources (Cont.)
Referral
Networking Event
Unknown



Lead Status
Attempting to Connect
Educating
Scheduling Meeting
Unqualfied
Bad Timing
Demo Scheduled
Assessing Prospect Fit

Deal Stages
Discovery Appointment
Needs Confirmed
Demo Confirmed
Negotiation Initiated
Agreement Reached
Closed Won
Closed Lost

Lifecycle Stage Definitions	
Lead	Typically a lead has filled out a form with more than just an email address or attended a conference in your industry.
Marketing Qualified Lead	MQLs represent contacts who meet your sales teams' minimum viability threshold. Your team will define this threshold via contact data points and activities.
Sales Qualified	SQLs represent contacts that your sales team has accepted as worthy of a direct sales follow up.

Lifecycle Stage Definitions	
Opportunity	Opportunities are contacts who have a percentage chance to close on a singular service or product purchase.
Customer	An actual, paying customer.
Evangelist	Evangelists are those contacts that are advocates for your business. They may refer new business to you unsolicited or they could be repeat customers.

Process Planning Worksheet

Lead Sources	Lead Sources (Cont.)



Lead Status	Deal Stages

Lifecycle Stage Definitions	
Lead	
Marketing Qualified Lead	
Sales Qualified Lead	

Lifecycle Stage Definitions	
Opportunity	
Customer	
Evangelist	