




HUBSPOT CRM FOUNDATIONS



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HubSpot CRM Foundations Training

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HUBSPOT HELP

DON'T GIVE UP! GET HELP

You will get out of HubSpot
what you put into HubSpot

- Work in it everyday, and keep your data clean - you will have actionable data.
- Occasionally use HubSpot - you will see marginal, sporadic results.

Stuck? Get Help

Help Button

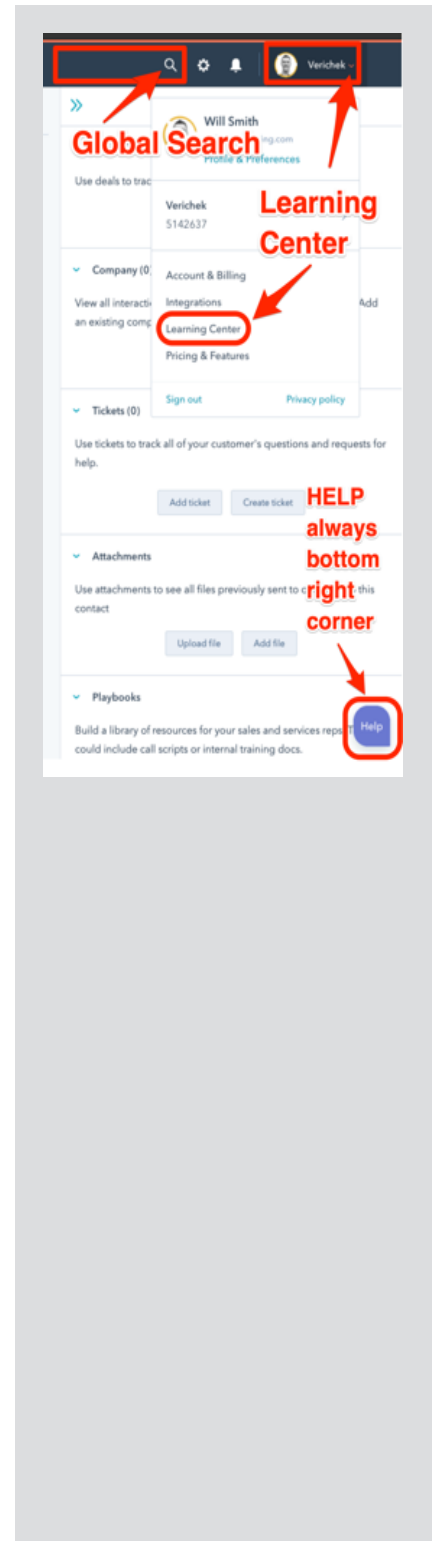
- Always at the bottom right of your screen
 - Knowledge Base
 - Help suggestions
 - Ask the HubSpot Community
 - Support Inbox

Learning Center

- Take classes
- Earn certifications
- Search for a topic – take a 15 minute review

Global Search

- In the main navigation
 - Knowledge articles are usually listed at the end of suggested list of content.



HUBSPOT HELP

Ways to get help:

- Search knowledge base
- Help Suggestions
- Ask the HS Community
- Support inbox – maybe someone from your team asked the same question.

PRO TIP:

Use the **“Call me”** function to get an answer quickly. HubSpot representatives are experts at working through problems and can quickly start a screen share to look at what you’re looking at.

“Chat” is the 2nd fastest way to get an answer.

The collage illustrates three ways to get help in HubSpot:

- Search knowledge base:** A chat window titled "Hey Will" with a search bar and "Support" links like "Ask the community", "Contact support", and "View your support inbox".
- Call me / Email:** A form titled "We'll email you" with fields for language, problem overview, description, and email address.
- Join the HubSpot Community:** A section encouraging users to find and share solutions, with links to Marketing, Sales, Service, and COS Design communities.

The bottom section shows the **Support Inbox** interface. It includes a navigation bar with tabs for Contacts, Conversations, Marketing, Sales, Service, Automation, and Reports. The main area displays a list of tickets with filters for "All tickets", "Open tickets", "Closed tickets", and "Favorites". A red arrow points to the "Select show all tickets" button. To the right, a red arrow points to the "Create a new ticket" button. The detailed view of a closed ticket (#2247827) shows a conversation history with a customer and a support representative.



CONNECT YOUR INBOX

To hit the ground running with HubSpot, the first thing to do is to connect your email. This connection will save you time and automate the recording of your emails directly into your HubSpot CRM. There are 2 parts to this: The inbox connection & email extension.

INBOX CONNECTION

Office 365 and Google users, can connect their inbox by simply providing their account credentials. If you don't use either, you'll connect through IMAP.

To help you choose your email connection type, navigate to mxttoolbox.com

- Enter your email domain (this is after the @ symbol in your email)
- Click **MX Lookup**

You will likely be connecting your inbox to HubSpot in one of the following ways:

- Gmail Account
- Office 365 Account
- IMAP
- Exchange Account

We will go over the 2 most popular ways to connect your inbox: Gmail & Office 365.

Connect your Gmail account:

In your HubSpot's account main navigation, click the settings icon

On the left menu, navigate to **Integrations > Email Integrations**

Click **Connect an inbox** > Select **Google / Gmail** > Enter your email > Click **Allow**

Connect your Office 365 account:

In your HubSpot's account main navigation, click the settings icon.

On the left menu, navigate to **Integrations > Email Integrations**

Click **Connect an inbox** > Select **Office 365** > Enter your email > Click **Allow**

For the best experience, the latest version of Chrome is recommended.

Supported Browsers - to update your browser click the name below:

[Google Chrome](#)

[Mozilla Firefox](#)

[Apple Safari](#)

[Microsoft Edge](#)



EMAIL EXTENSION

The email extension places your HubSpot CRM directly into your inbox. You'll have access to your HubSpot sales tools from within your inbox.

NOTE: HubSpot does not support Apple Mail.

For best results, it is highly recommended that **Google Chrome** is used.

- Instant Chrome notifications for tracked emails
- Access to templates, documents and sequences from Gmail inbox.
- Quickly see activity feed by clicking the extension icon in browser toolbar.

INSTALL CHROME EXTENSION

- Search for the HubSpot Sales extension in the Google Chrome store.
- Click **Add to Chrome**.
- **Log** into your HubSpot Sales account when prompted.

INSTALL OFFICE 365 ADD-IN

- Search for the HubSpot Sales add-in in the Microsoft AppSource.
- Click > **Get it now** (left sidebar) then Click > **Continue**.
- You'll be redirected to your Office 365 account. Click > **Add**.



INSTALL OUTLOOK DESKTOP ADD-IN

- **Download** the HubSpot Sales Outlook desktop add-in.
- Run the HubSpot sales for Outlook installer **setup.exe**.
- Restart Outlook.
- **Log in** with your HubSpot Sales username & password.
- HubSpot Sales should now appear in the top inbox ribbon.

NOTE: HubSpot Sales Outlook Desktop add-in will not work on MAC. Do not install both the 365 add-in AND the desktop add-in this will cause conflict.



CONTACTS IN HUBSPOT

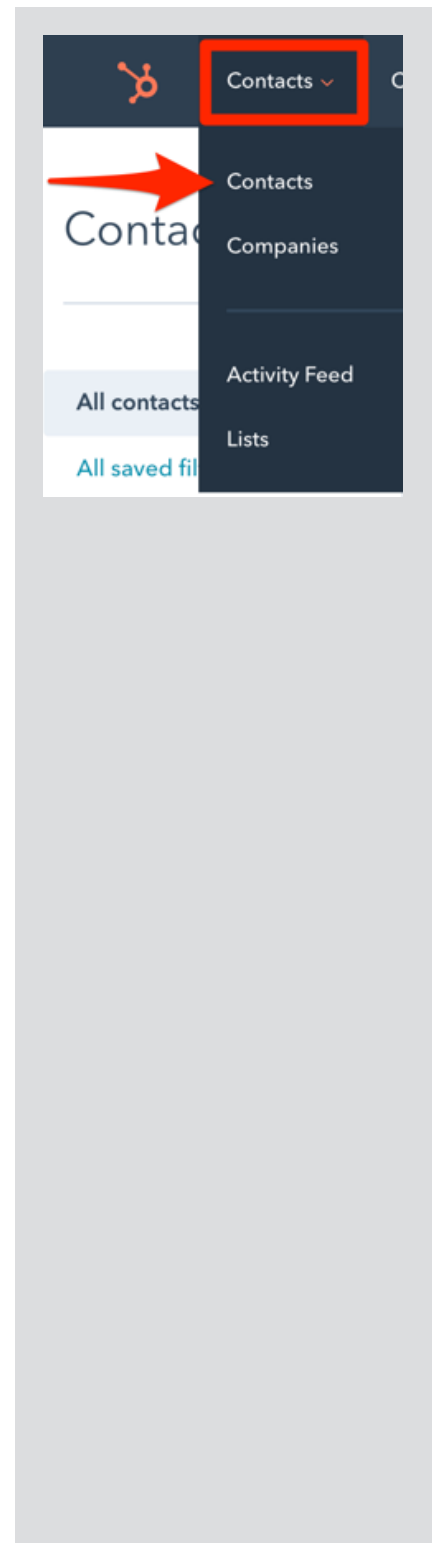
HubSpot contact records are the lifeblood of your business. Everyone that has been in touch with your business can be found here.

This information is divided into 3 buckets:

1. Contacts: The people you speak with.
2. Companies: The place where they work.
3. Deals: The purchases you're working with them on.

TO FIND YOUR CONTACTS:

- In the main navigation, select **Contacts** > then **Contacts** in the drop down menu. This is a list of everyone that has interacted with your business
- In the contacts CRM:
 1. Search for contacts by name
 2. Depending upon your business, manually add contacts who haven't been to your website. Depending upon your business, this could include:
 - Call ins
 - Walk ins
 3. Apply filters to find contacts that meet specific criteria.



FINDING AND FILTERING CONTACTS

Now that your email is connected, a contact record will be created for each person you email.

It's important to keep your CRM organized and know how to find the information you need to reach out to the right people at the right time with the right message.

In the main navigation, go to **Contacts > Contacts**.

Click **Add Filters** (left menu).

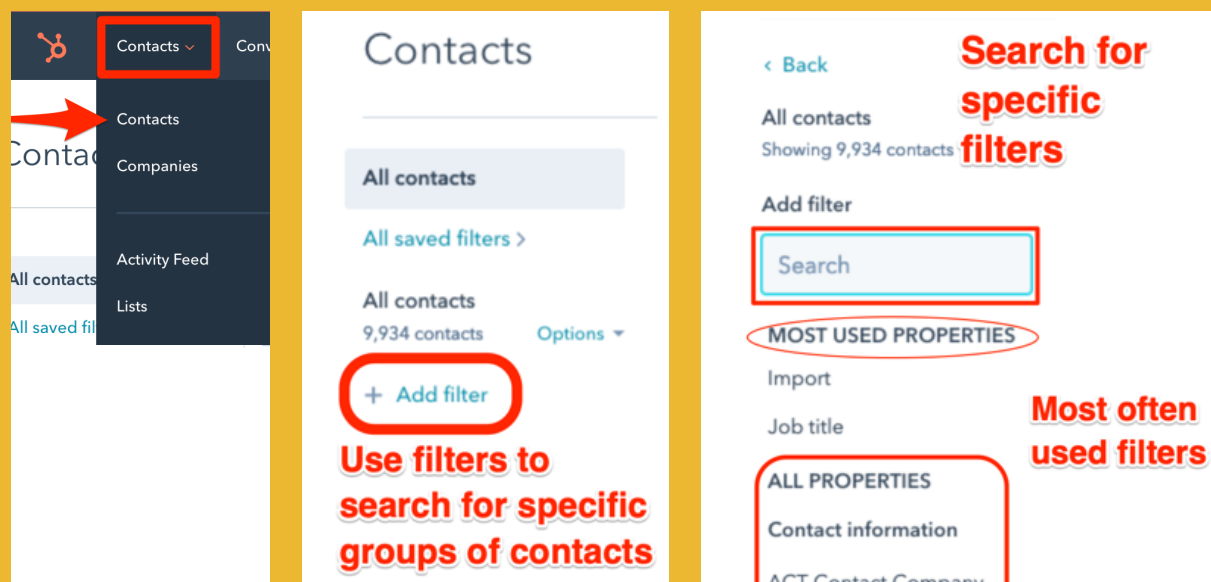
Since you connected your email inbox, check these two filters:

- Recent sales email opened
- Recent sales email replied

As more information populates your CRM, the more useful more filters will become.

ACTION ITEM:

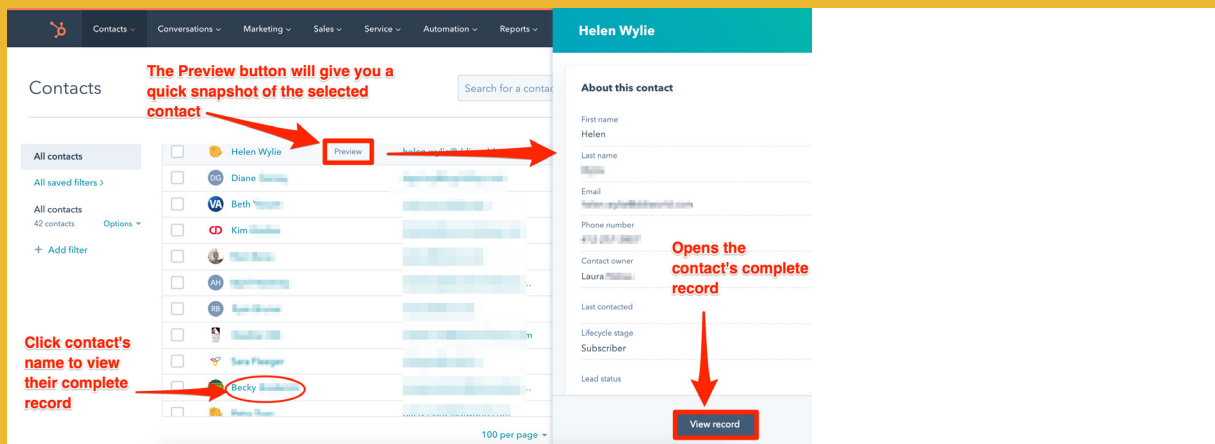
Scroll through the available HubSpot filters. Seeing what is available will help you in the future.



CONTACT RECORD

CONTACT RECORD PREVIEW

From the contact list, if you need a quick look at your contact's information, hover over the area to the right of the contact's name and click the preview button that appears.

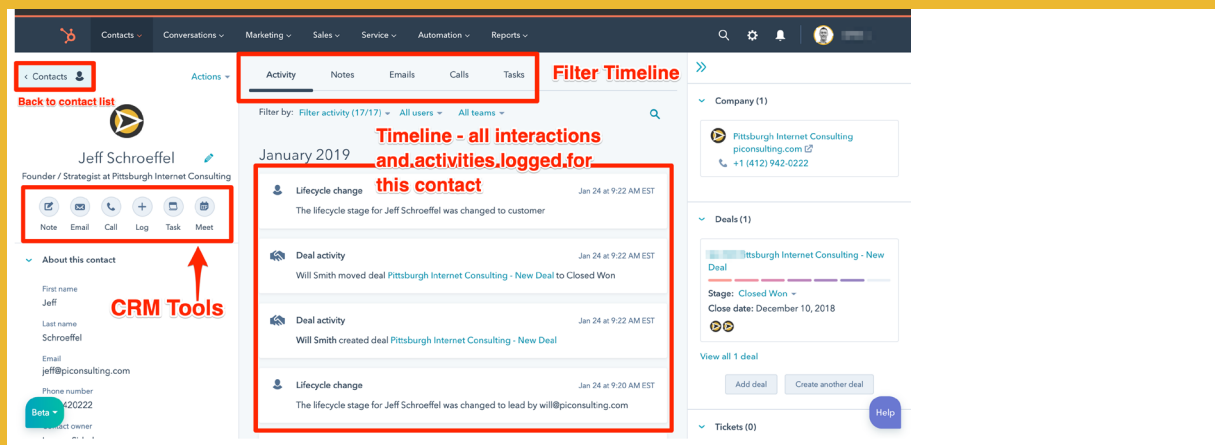


COMPLETE CONTACT RECORD

Left panel: CRM Toolbox (under contact name) and information about the contact.

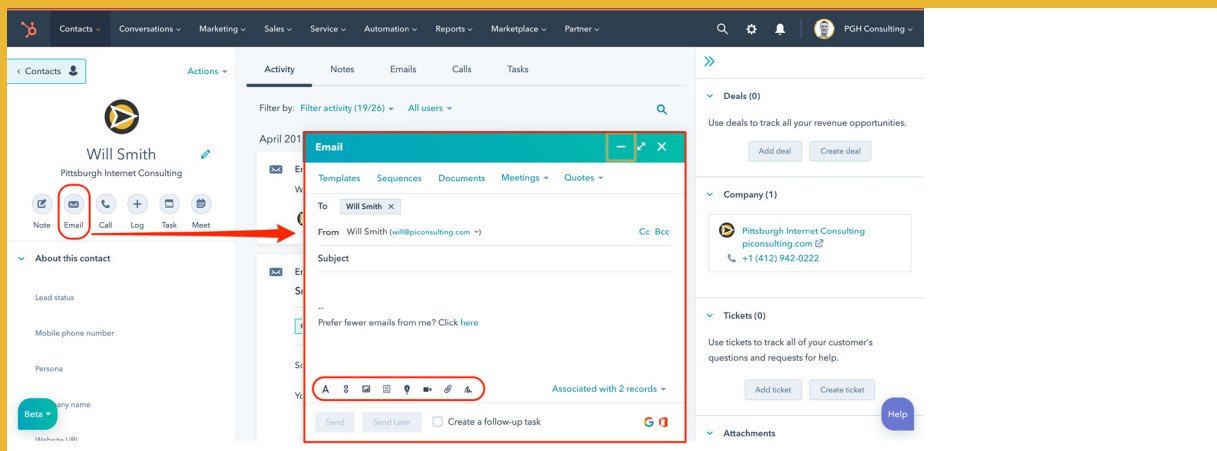
Middle panel: Timeline.

Right Panel: Company, Deal and Ticket associations.



HUBSPOT TOOLS - EMAIL

- With your connected email you are able to email contacts from within your CRM
- The pop-up email window allows you to view contact information while composing your email – allowing you to provide the best context while communicating
 - Contact Timeline
 - Associated deals, companies
 - Attachments
 - Previously recorded emails.



Available tools:

- Format Text
- Insert Link
- Insert Image
- Insert Snippet
- Insert Knowledge article (Service Hub Required)
- Insert video (Requires PRO)
- Attach file
- Edit Signature.

PRO TIP:

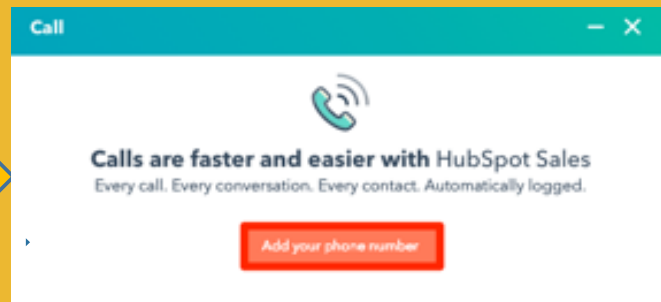
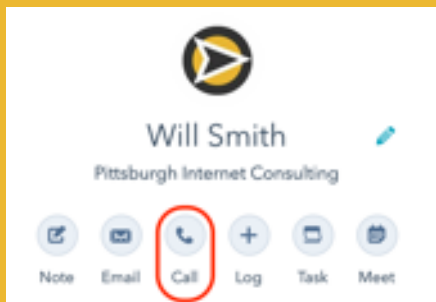
- Create follow up tasks before sending email
- Schedule emails for best possible delivery time.



HUBSPOT TOOLS – CALLS

Set up the Call Tool

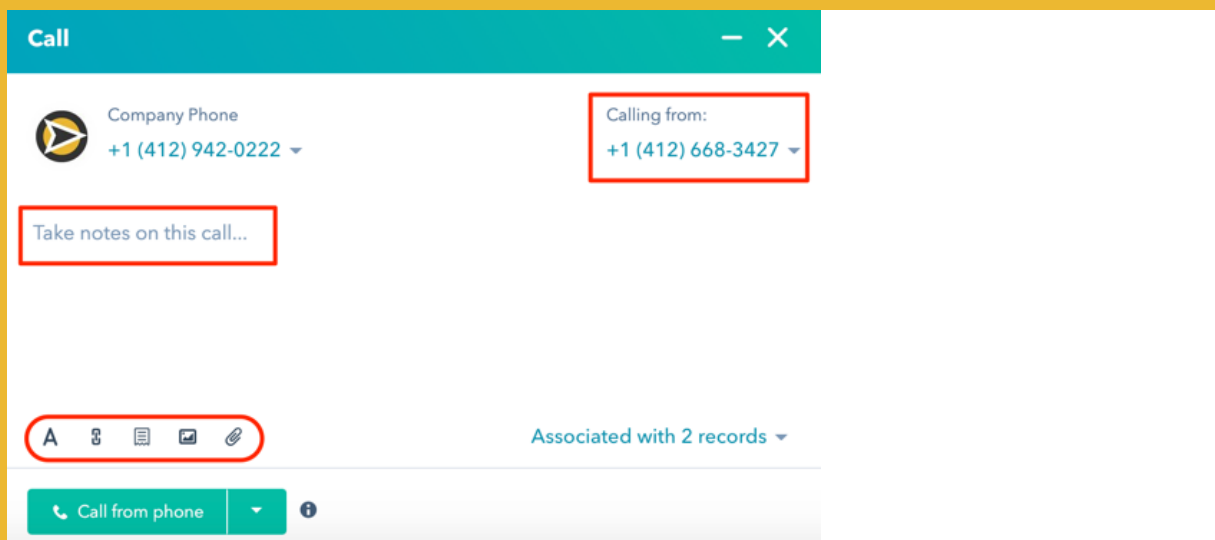
1. Click the “Call Tool” on any contact
2. Click Add your phone number
3. Enter your direct line phone number – extensions can also be included
4. Your phone will ring – pick it up and enter the verification code when prompted.

A screenshot of the 'Add phone number' form. The title bar is teal and says 'Add phone number' with a close button. The main content area has a teal header with the text '1. Add your phone number' in red. Below this, it says 'Registering your phone number will allow you to call your contacts using either your phone or your web browser.' There is a text input field with a country dropdown (showing the US flag) and the value '+1'. Below the input field, it says 'You'll get a call in a moment asking you to enter a verification code.' At the bottom, there are 'Register' and 'Cancel' buttons. To the right of these buttons, the text '2. Enter the verification code' is displayed in red.

HUBSPOT TOOLS – CALLS

Calling contacts with call tool

1. Click the “Call Tool” on any contact
2. Your phone will ring
3. When you pick it up, you’ll hear the contact’s phone ringing
4. Take notes on the call or minimize the calling window
5. Once the call is complete, be sure to select and record an outcome



PRO TIPS:

- Keeping the contact record open while calling gives you access to all the information and interactions your contact has had with you and your company
- Taking notes during a call keeps your conversation easily accessible for future reference.



HUBSPOT TOOLS – LOG

The Log tool is the most under utilized tool in HubSpot – for the situations listed below, most rely upon the Notes tool. For better segmentation, use the LOG TOOL.

This tool will allow you to log:

- Incoming Calls
- Emails (emails that haven't been recorded)
- Meetings (good for walk-ins or unscheduled meetings).

The image displays three screenshots of the HubSpot Log tool interface, arranged on a yellow background. A yellow arrow points from the 'Log Call' window to the 'Log Meeting' window.

- Log Call:** The 'Call outcome' dropdown menu is open, showing options like 'No answer', 'Busy', 'Wrong number', etc. The 'Select an outcome' option is highlighted.
- Log Email:** The 'Describe the email...' text area is visible. The 'Create a follow-up task' checkbox is highlighted.
- Log Meeting:** The 'Describe the meeting...' text area is visible. The 'Create a follow-up task' checkbox is highlighted.

The image shows a screenshot of the HubSpot contact profile for Will Smith, Pittsburgh Internet Consulting. The 'Log' button is highlighted with a red circle. A dropdown menu is open, showing options to 'Log a call', 'Log an email', and 'Log a meeting', which are also highlighted with a red box.



HUBSPOT TOOLS – TASKS

When used properly, tasks are a very powerful way to keep your work organized. There are 3 places to create tasks:

- Contact list - Good for assigning tasks for multiple contacts
- Contact record tools
- Task screen - In the main navigation: **Sales > Tasks**.

1. CONTACT LIST

- In the main navigation: **Contacts > Contacts**
- Select contact (or multiple contacts) by selecting the checkbox
- Click **More > Create tasks**.

2. CONTACT RECORD TOOLS

- In the selected contact record: Click the **Task** tool
- In the pop-up window at the bottom of your screen
 1. Name your task
 2. Select a due date
 3. Describe your task
 4. **IMPORTANT**
Select the type of task:
 - To-do
 - Email
 - Call
 5. Create a reminder (HubSpot will email you).

The image shows two parts of the HubSpot interface. On the left is a 'Task' creation modal. It has a title bar 'Task' with close and maximize buttons. Below it, there's a '1. Name your task' label pointing to the 'Enter your task' text input. To the right, '2. Select a due date' points to the 'Due Date' dropdown menu, which is currently set to 'Tomorrow' at '8:00 AM'. Below that, '3. Describe your task' points to the 'Notes' text area. Further down, '4. What type of task is it: to-do, email or call?' points to the 'Type' dropdown menu, which is set to 'To-do'. At the bottom, '5. Create a reminder' points to the 'Save Task' button. On the right is a contact record for 'Will Smith'. At the top, it says '1 selected' and has buttons for 'Assign', 'Edit', 'Permanently delete', and a 'More' dropdown. The 'More' dropdown is open, showing a 'Create tasks' button highlighted with a red circle.



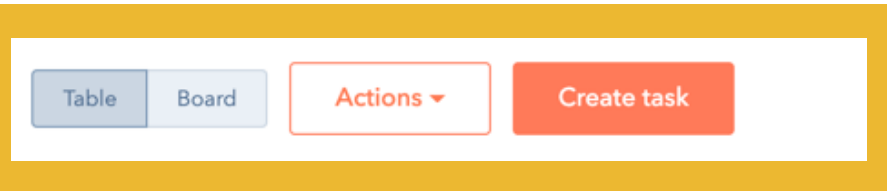
HUBSPOT TOOLS – TASKS

3. TASK SCREEN

All the tasks you have created can be found in the Task List.

In the main navigation: **Sales > Tasks**.

Create a new task by clicking the **Create Task** button (upper right).



1. Name your task
2. Associate your task
3. Create a due date
4. Create an email reminder time
 - Highly recommended!
5. **IMPORTANT**
Select the type of task
 - To-do
 - Email
 - Call
6. Label type of task
7. Click **Create**.

A screenshot of the HubSpot 'Create task' form. The form is titled 'Create task' and has a close button (X) in the top right corner. It contains several fields and sections, each numbered with a red circle and a number:

1. A text input field containing 'Deliver HubSpot Training'.
2. A dropdown menu labeled 'Associate with records' with a search bar and a dropdown arrow.
3. A section for 'Due Date' with a dropdown menu set to 'Tomorrow' and a time selector set to '4:00 PM'.
4. A section for 'Email reminder' with a date selector set to '02/12/2019' and a time selector set to '8:00 AM'.
5. A section for 'Notes' with a large text area and a rich text editor toolbar.
6. A section for 'Type' with a dropdown menu set to 'To-do'.
7. A section for 'Queue' with a dropdown menu set to 'None'.

At the bottom of the form, there is an 'Assigned to' dropdown menu set to 'Will Smith (will@piconsulting.com)' and a final section with 'Create' and 'Cancel' buttons.

HUBSPOT TOOLS – LOG A MEETING

Log a meeting – click the meetings tool.
Connect your Google or Office 365 calendar here.
Once connected, meetings can be added to your calendar.

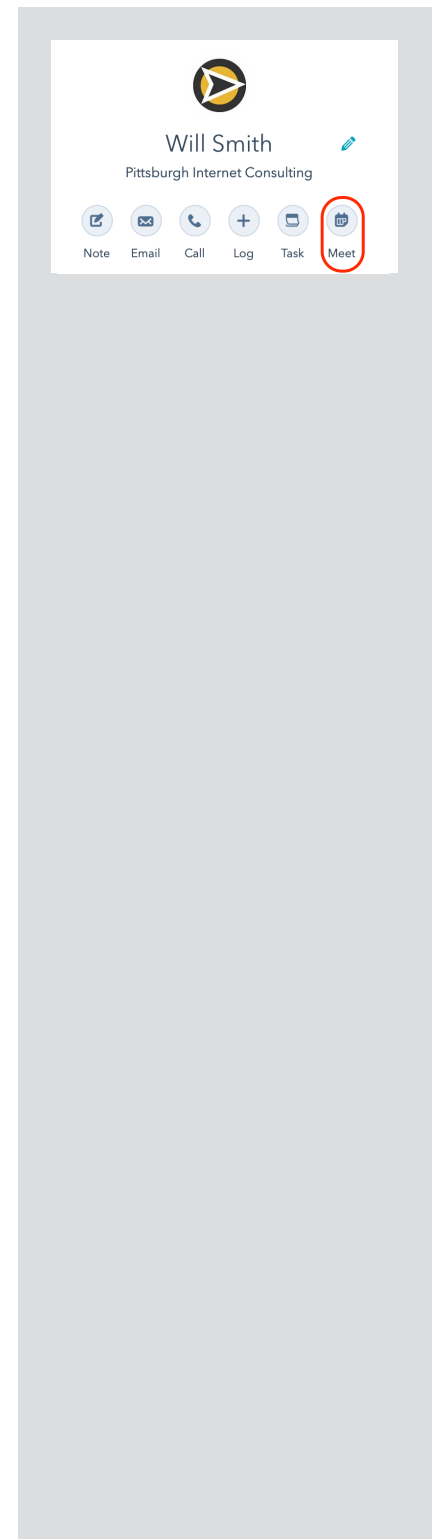
The screenshot shows the 'Schedule' window in HubSpot. At the top, it asks 'What are you meeting about?'. Below this, there are fields for 'Attendees' (with a dropdown showing '1 attendee'), 'Start time' (calendar icon, '04/20/2019', '7:00 AM'), and 'Duration' ('1 Hour'). A text area for 'Describe your meeting...' is below. At the bottom, there is a 'Save' button and a link that says 'Connect to Google Calendar or Office 365 Calendar'.

This screenshot shows the 'Add to Office 365 Calendar' dialog box. It has a search bar at the top labeled 'Search all records'. Below the search bar, there is a list of contacts with checkboxes. The contacts listed are Jeff Schroeffel (jschroeffel@pittsburghinternetconsulting.com), robb@lutherline.com, and Will Smith (will@piconsulting.com). The dialog also shows the meeting details: 'What are you meeting about?', 'Start time' (04/20/2019, 7:00 AM), and 'Duration' (1 Hour). At the bottom, there is a 'Save' button and a link that says 'Add to Office 365 Calendar'.

Search for contacts to include in the meeting.

Available tools:

- Format Text
- Insert a snippet
- Video conferencing
- Attach a document



COMPANY ASSOCIATIONS

Contacts with company email addresses can be automatically associated with their respective companies.

To create this global setting:

- Click the **Settings** icon (main navigation, upper right). ⚙️
- Select **Contacts & Companies** in the left menu.
- Select the 2nd tab labeled **Companies**.
- Toggle the **Automatically create and associate with contacts** switch **ON**.

The image shows two screenshots from the HubSpot interface. The left screenshot is the 'Companies' settings page, with the 'Companies' tab selected. It features several sections: 'Set the properties your team sees on company records', 'Set the properties your team sees when creating companies', 'Lifecycle stage sync', 'Automatically create and associate companies with contacts' (highlighted with a red box and a toggle switch turned on), and 'Automatically fill company properties with HubSpot Insights'. The right screenshot is the 'Settings' page, with the 'Contacts & Companies' section selected in the left sidebar. The 'Companies' tab is also selected in the top navigation bar. The 'Automatically create and associate companies with contacts' toggle is shown as turned on.

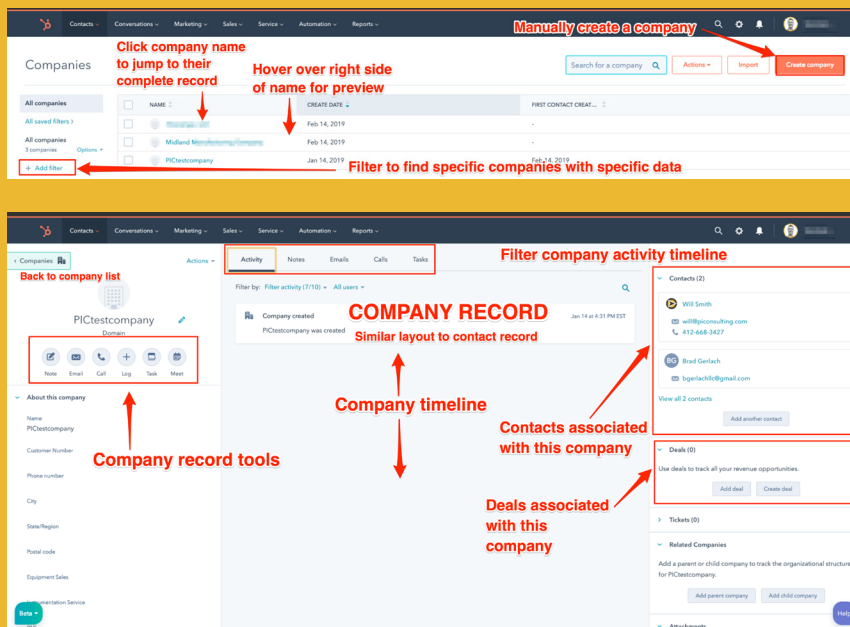
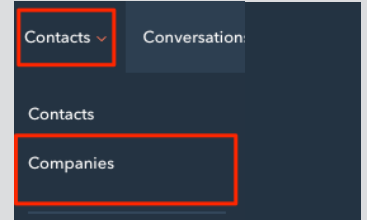
“HubSpot Insights is a database of company information that HubSpot gathers from internal and third-party data. If you add a company with a company domain name, data will be pulled from HubSpot Insights to the company record”.



COMPANY RECORDS

HubSpot keeps their design consistent throughout the CRM. Company records are very similar to contact records. Similar to the contact list, company names are previewed and clicked to reach the Company Record.

In the main navigation select **Contacts > Companies**
From the company list, hover over the company name and click preview for a quick snapshot of the company record. Select **View record** for the complete company record.



COMPANY RELATIONSHIPS

Contacts & Company Relationship:

- You are selling to companies, however, you interact with contacts at those companies
- It is important to always associate your contacts with a company
- When the email address is a company email address, HubSpot finds and populates the information into the company record. This global setting was created on page 17
- Multiple contacts can be associated with a company
- Parent and Child Companies can easily be created to show the relationship to each other. For example:
 - ABC Company is the parent company, located in Albany, NY
 - One of the satellite offices or branch offices, XYZ Branch is the child company, located in Xenia, OH. This would be the child company
 - Alan Boss is the president of ABC Company and his contact is associated with the parent company
 - Xavier Yoast is the manager of XYZ Branch and his contact is associated with the child company, which is also associated with the parent company ABC Company
- To create Parent and Child Companies:
 - Navigate to the Company Record
 - In the 3rd right panel find the company property Related Companies
 - Select Add parent company or Add child company.

The image shows two overlapping modal windows from the HubSpot interface. The 'Add a parent company' window on the left has a teal header and a search bar with the placeholder 'Search by name or domain'. Below it, a section titled 'Related Companies' contains the text 'Add a parent or child company to track the organizational structure for [company name]' and two buttons: 'Add parent company' and 'Add child company', which are highlighted with a red rectangle. The 'Add child companies' window on the right also has a teal header and a search bar. It includes a 'Selected' section with the text 'This is where the child companies of PIC DESIGN INC. will go.' and 'Done' and 'Cancel' buttons at the bottom.



COMPANY TOOLS

In the About section of the company record, all tools that are available with the contact record are also available in the company and deal records:

- Notes: click to add a note
- Email: click to write a one-to-one email
- Call: click to call
- Log +: click manually log an activity
- Task: click to create a task for the record
- Meet: click to set up a meeting.

All HubSpot tools operate in the same way in the company record as they do with the contact record. When emailing a company that is associated with multiple contacts, HubSpot asks to specify which contact or contacts you would like to email within the company.

The image shows two side-by-side screenshots from the HubSpot interface. The left screenshot displays the 'About' section for a company named 'Pittsburgh Internet Cons...' with the domain 'piconsulting.com'. Below the company name, there is a row of six circular icons representing different tools: Note, Email, Call, Log, Task, and Meet. The right screenshot shows an 'Email' modal window. At the top, there are tabs for Templates, Sequences, Documents, Meetings, and Quotes. The 'To' field is populated with two email addresses: 'Mariana Forteza (mariana@piconsulting.com)' and 'Will Smith (will@piconsulting.com)'. These two entries are highlighted with a red rectangular box. Below the 'To' field, there is a 'From' field and a 'Subject' field. At the bottom of the modal, there are buttons for 'Send', 'Send Later', and a checkbox for 'Create a follow-up task'. A status bar at the bottom right indicates 'Associated with 1 record'.



DEALS

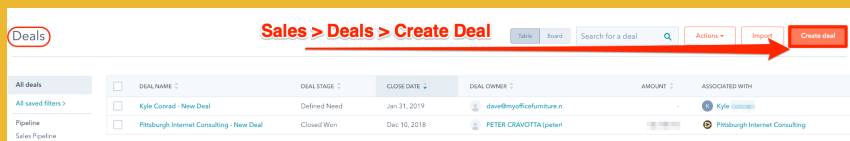
Deals track potential revenue that is associated with a particular contact or company. Depending upon your business and structure, a deal should be created whenever your contact/company takes action that could lead to revenue. At this point, they are no longer a marketing qualified lead that could make a purchase; they are now a possible sale - a sales qualified lead.

3 places to create a new deal:

- Deal list
- Contact record
- Company record.

DEAL LIST

In the main navigation to go **Sales > Deals**.
Click **Create Deal**.



CONTACT RECORD

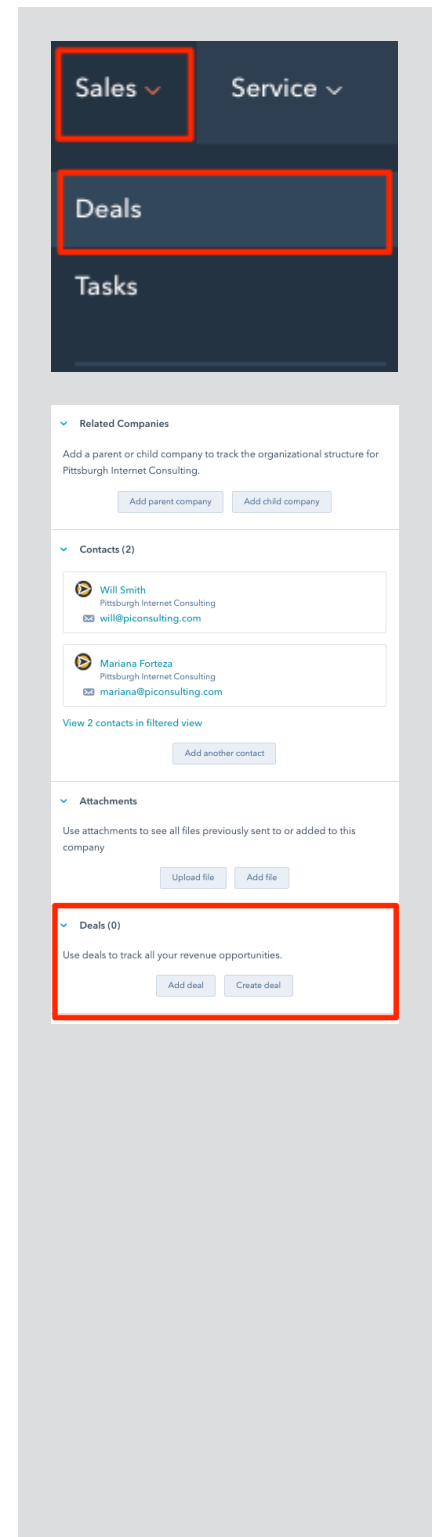
Create and associate a deal with a contact in the 3rd panel on the right.

Click **Add Deal** or **Create Deal**.

COMPANY RECORD

Create and associate a deal with a company in the 3rd panel on the right.

Click **Add Deal** or **Create Deal**.



DEAL RECORDS

The deal record is similar to the Contact Record and Company Record in its layout, function and available tools.

The screenshot shows the Deal Record interface for 'Pittsburgh Internet Consulting - New Deal'. The interface is divided into several panels:

- Left Panel:** Contains a 'Back to deal list' link, deal details (Amount, Deal stage: Closed Won, Close date: 12/10/2018, Deal owner: PETER CRAVOTTA, Last activity date: 01/24/2019 9:29 AM EST, Deal type: Existing Business), and buttons for 'View all properties' and 'View property history'.
- Top Panel:** Includes a 'Deals' tab, a 'Timeline filters' section, and tabs for 'Activity', 'Notes', 'Emails', 'Calls', and 'Tasks'.
- Center Panel:** Displays the 'Deal Timeline - all events, interactions and activities are recorded here for this deal'. It shows a list of activities for January 2019, including notes, deal activity, and deal creation.
- Right Panel:** Contains sections for 'Associated contacts and companies' (listing Jeff Schwoefel and Pittsburgh Internet Consulting), 'Tickets (0)', 'Products', 'Quotes', and 'Attachments' (listing two PDF files).

Annotations in red text and boxes highlight key features:

- Back to deal list:** A red box highlights the 'Deals' tab and the 'Back to deal list' link.
- Deal tools (similar to contact tools):** A red box highlights the 'Note', 'Email', 'Call', 'Log', 'Task', and 'Meet' buttons in the left panel.
- Deal Timeline - all events, interactions and activities are recorded here for this deal:** A red box highlights the central timeline section.
- Associated contacts and companies:** A red box highlights the 'Associated contacts and companies' section on the right.
- Attachments:** A red box highlights the 'Attachments' section on the right.
- Any emailed attachments are stored here. Attachments can also be manually uploaded:** A red arrow points from this text to the 'Attachments' section.

DEAL TIMELINE:

- Similar to the contact and company record timelines, the deal timeline records all activities (with the most recent on top)
- Activities can be filtered
- Search for specific activities.

ASSOCIATED CONTACTS AND COMPANIES:

- Contacts and companies associated with the deal are in the 3rd panel
- Attachments that have been emailed to a contact or company will be stored here
- Attachments can be manually uploaded.



DEALS – BOARD VIEW

In the Board View:

Deals are presented as movable “cards”.

The “deal cards” can be moved ahead or back along the pipeline or deal stages as needed.

The pipeline is shown in the columns of the board with the total of predicted revenue at the bottom of each column.

Click on the Deal Name to see the deal record.

The screenshot displays the HubSpot Deals Board View. The top navigation bar includes links for Contacts, Conversations, Marketing, Sales, Service, Automation, and Reports. The main header shows 'Deals Deal Board View' with a search bar and buttons for Actions, Import, and Create deal. The pipeline is divided into seven stages: LEAD TO OXFORD (44%), DISCOVERY (16%), DIAGNOSE (22%), DESIGN (24%), QUESTIONNAIRE RECEIVED (5%), VALUE PROPOSITION (3%), and TECH O (3%). Each stage contains deal cards with details like deal name, close date, and status. Red annotations highlight key features: 'Deal Cards' points to the cards; 'Click deal name to view complete deal record' points to a card; 'Cards can be moved ahead or back along the sales pipeline as needed' points to a card.

The HubSpot default sales pipeline has the following seven deal stages. Each percentage is the probability of the chance of the deal closing.

- Appointment Scheduled (20%)
- Qualified to by (40%)
- Presentation scheduled (60%)
- Decision maker bought-in (80%)
- Contract sent (90%)
- Closed Won (100% Won)
- Closed lost (0% Lost).



SET UP & CUSTOMIZE DEAL PIPELINES & STAGES

Setting up your deal pipeline to be specific for your business will help your team identify opportunities as well as points of friction that may prevent sales from closing.

To edit or create a deal pipeline:

Click the **settings icon** ⚙️ (main navigation, upper right).

In the Settings menu (left side) Click **Sales > Deals**.

Under **Deal Pipelines and Stages** section:

PLEASE NOTE: If you have **Sales Hub Professional or Enterprise**, you are able to create a new (and multiple pipelines.) All other users will need to **Edit** the Default Sales Pipeline. Specific permissions are required to perform some of these actions.

To edit:

1. To change the stage name: click the **Stage name** field
2. To delete stage: click **Delete**
3. To create a new deal stage: click **Add a deal stage**
4. To change the order: **drag** the stage to the new position
5. To change the probability of closing a deal at that stage, click the **Win Probability** arrow and select an option. This number must be below 100.

The screenshot shows the 'Sales Pipeline' configuration page. It has two tabs: 'Configure' (active) and 'Automation'. Below the tabs is a table of stages. The table has three columns: 'STAGE NAME', 'WIN PROBABILITY', and 'UPDATE STAGE PROPERTIES'. The stages listed are: 'Appointment Scheduled' (20%), 'Qualified To Buy' (40%), 'Presentation Scheduled' (60%), 'Decision Maker Bought-In' (80%), 'Contract Sent' (90%), 'Closed Won' (Won), and 'Closed Lost' (Lost). At the bottom, there is a '+ Add a deal stage' button. Red annotations with arrows point to specific elements: 1. 'Click stage name to change' points to the 'Appointment Scheduled' stage name. 2. 'Delete deal stage' points to the 'Delete' button next to 'Appointment Scheduled'. 3. 'Create a new deal stage' points to the '+ Add a deal stage' button. 4. 'Drag to reposition deal stages' points to the vertical ellipsis (three dots) to the left of the 'Presentation Scheduled' stage. 5. 'Click to change probability (must be below 100)' points to the dropdown arrow next to the '60%' win probability for 'Presentation Scheduled'.

STAGE NAME	WIN PROBABILITY	UPDATE STAGE PROPERTIES
Appointment Scheduled	20%	Delete Edit properties
Qualified To Buy	40%	
Presentation Scheduled	60%	
Decision Maker Bought-In	80%	
Contract Sent	90%	
Closed Won	Won	
Closed Lost	Lost	

+ Add a deal stage



CREATE A DEAL

Note: This can be customized to fit your business and team needs.

Create a deal:

1. Name the deal: choose a name that is will be obvious to you and your team
2. Select the proper pipeline – “sales pipeline” and its default stages are set by HubSpot. This can be customized to your business
3. What is the status of the deal
4. Enter the deal amount - this can be changed or updated later
5. The closing date can be changed/updated later, if necessary
6. If not you, select who from your team will be working this deal
7. For best data, associate deal with a company and/or contact
8. Add product and/or quantity, if applicable
9. When finished, click **Create**.

The screenshot shows the 'Create deal' form in HubSpot. The form is titled 'Create deal' and has a close button (X) in the top right corner. The form fields and their corresponding annotations are as follows:

- Deal name ***: Labeled '1. Name the deal'. The input field contains 'TEST PIC deal'.
- Pipeline ***: Labeled '2. Sales Pipeline is the default'. The dropdown menu is set to 'Sales Pipeline'.
- Deal stage ***: Labeled '3. Select deal stage status of deal - HubSpot provides a default stage'. The dropdown menu is set to 'Initial Contact'.
- Amount**: Labeled '4. Enter deal amount - this can be updated/edited/changed later'. The input field contains '\$1,000'.
- Close date**: Labeled '5. Enter expected close date'. The date is set to '01/31/2019'.
- Deal owner**: Labeled '6. Select who is working this deal'. The dropdown menu is set to 'Will Smith'.
- Company**: Labeled '7. Associate deal with a company and/or contact'. The dropdown menu is set to 'Company'.
- Contact**: Labeled '7. Associate deal with a company and/or contact'. The dropdown menu is set to 'Contact'.
- Add product**: Labeled '8. If applicable: add product and quantity'. The input field contains 'Add a product'.
- Quantity**: Labeled '8. If applicable: add product and quantity'. The input field is empty.
- Update deal amount**: Labeled '9. Click Create'. The checkbox is unchecked.

At the bottom of the form, there are three buttons: 'Create', 'Create and add another', and 'Cancel'. A red arrow points to the 'Create' button, which is labeled '9. Click Create'.



DEALS – BEST PRACTICES

As with your contact database (CRM), it is important to not only get as much data as possible, but to make sure this data is updated and stays clean.

The information gathered from deals throughout the sales process, will help improve your sales process over time.

HubSpot Deals Best Practices:

- When creating a deal, always associate to a contact
- Be sure to create the deal in the correct deal pipeline: the Sales Pipeline is the default in HubSpot
- Name the deal in a way that it is easily recognizable to you and to your team
- Include as many details as possible when creating a deal
- Always fill in the deal amount (this can be changed/edited later)
- Use the deal board to keep deals up to date.

You Can Upgrade To Sales Pro For Increased
Deals Functionality

[LEARN MORE](#)



FINAL THOUGHTS & TIPS

- For a quick win – connect your email inbox and install the email extension FIRST
- Use HubSpot consistently throughout your day.. Developing new habits, especially new work systems take time, effort and patience
- Experiment & Explore: Click around and try different things
- If you're about to make a significant change, HubSpot will ask you if you're sure you want to do this
- If you get lost or stuck, click the HELP button – bottom right of your screen
- For the quickest answer, have HubSpot call you back. 2nd fastest way to get an answer is starting a chat
- Contacts are the lifeblood of your business – treat them with care
- Even if you are in a B2B you still need to talk to a person to close a deal. That person is your contact in your HubSpot CRM
- Use the “Log” tool to record incoming calls
- When recording interactions – use notes sparingly
- Too many note makes it difficult to find filter and find the data you're looking for – it is the same as having a desk full of Post-It notes
- After recording an activity – develop the habit of creating a follow-up task – asking “What is the next step?”
- Customize the Sales Pipeline to fit your business and processes
- Keep your deals updated – move them along the sales pipeline (deal board)
- The more you work in HubSpot – the more HubSpot will work for you. Good Luck!

