

One Day **Agenda**



AM Sessions

| Welcome & Introductions

| Reviewing Goals with HubSpotCRM

Inbound Selling Methodology

Inbound Lead Generation (marketing tool level-set)

| Funnel Definitions

Defining Lifecycle Stages

Lead Hand-Off Definition

Viewing Contacts and Companies in CRM

| Communicating with Contacts: Emails, Calls, Tasks

PM Sessions

| Lunch

| Working a Lead

Prospecting using CRM

Associating Contacts, Companies, Deals and Attachments

Workshop: Receiving a Lead

| Deals

Work a deal through stages

Workshop: Closing a Deal

| Reporting

Reading the multiple dashboards

Lists, Reports, and Views for reporting

| Wrap Up