



HubSpot – Company Creation Guide

When creating a company in HubSpot there are some things you must know beforehand!

The following properties are required fields:

Company domain name: @_____ (e.g. @skgtexas.com)

Name: Name of the Company, this should auto populate once you add the domain.

Company Owner: Who is creating the company record, choose “No Owner” if it will be a house contact.

Lifecycle Stage: Choose from the following (**Not required but helpful**)

- **Subscriber:** A contact who has opted in to hear more from you by signing up for your blog or newsletter.
- **Lead:** (Business Development) Potential opportunity that has not been qualified yet. There is no official deal assigned yet.
- **Marketing Qualified Lead:** A company or contact that the marketing team has qualified as ready for the sales team.
- **Sales Qualified Lead:** A company or contact that the sales/am team has qualified as a potential customer.
- **Opportunity:** A company or contact who is associated with a deal (e.g., they are involved in a potential deal with SKG).
- **Customer:** A company or contact with at least one closed deal.
- **Evangelist:** a customer who has advocated for your organization.
- **Other:** a wildcard stage that can be used when a contact does not fit any of the above stages.



Lead Status: Choose from the following (Not required but helpful)

- **New:** These are leads you have not yet reached out to. Researching and gathering information.
- **Attempted to Contact:** These are leads you have tried to reach out to but have not been able to successfully connect with yet.
- **Connected:** These are leads you have been able to contact but are not yet opportunities. A lead with this status may still be waiting on a booked meeting with a decision-maker on their team or may still be working to establish a budget.
- **In Progress:** Once you have secured a meeting and connected with a customer, you are still gathering information.
- **Future Follow-up:** Follow up with the company or contact in the future, set a reminder.
- **Unqualified:** Contacts may become unqualified for several reasons. These are leads that may have told you they are no longer interested in moving forward or leads you have determined are not a good fit for your product. This status may also indicate an opportunity to send this lead back to your marketing team for a marketing campaign.
- **Open Deal:** These are leads that have expressed interest in buying your product or service. You have already opened a deal with them.

Vertical Market: Vertical Market is defined as a market encompassing a group of companies and customers that are all interconnected around a specific niche. SKG has the following vertical markets: Education, Government, Healthcare, Corporate, Technology. There are sub-categories for each vertical market. Pick the one that is appropriate for your client.