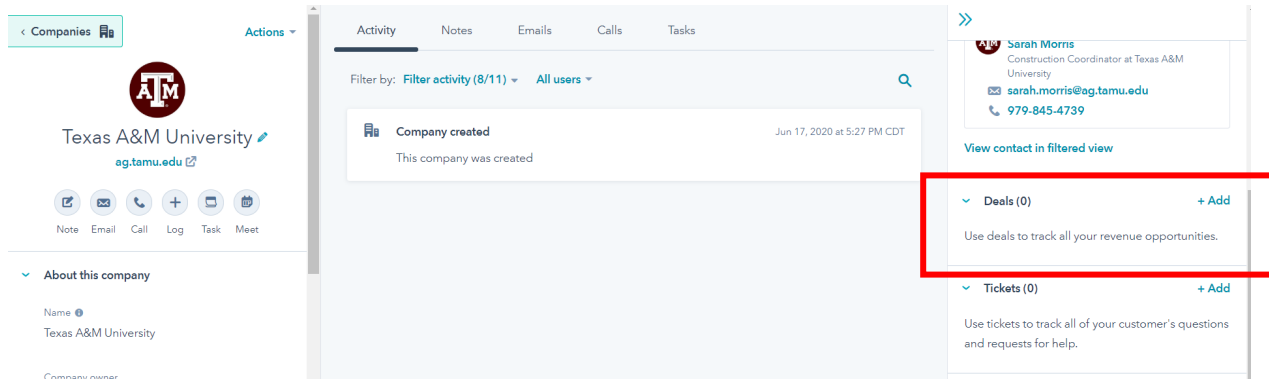




## HubSpot – Deal Creation Guide

When creating a deal in HubSpot there are some things you must know beforehand! Anything under \$10K total sell is not required to be entered in HubSpot.

You **must** create a Deal directly in the Company Record. If the company is not in HubSpot, a Company must be created first.



The following properties are required fields:

**Deal Name:** Company Name – Location – Project Name – Description.

**No acronyms or initials!**

*I.e. (Google – Randall Phase 3 – Ancillary)*

**Pipeline:** For now, this will always be “Sales Pipeline”

**Deal Stage:** Choose from the following

- **Lead:** When creating a “Lead” we will NEVER include any monetary amount. Monetary amounts will ONLY be associated with those stages that are weighted % (below)
- **10%:** Conceptual, Ideation, Thought Starters. At this stage, the lead had been previously qualified and is now going into conceptualization, ideation and thought starters.
- **25%:** Design and Budgeting. At this stage, the SKG budget tool is being utilized to work with the client. High level design is taking place for options. Labor Request form is submitted, Design Form is submitted, Marketing Form is submitted for presentation/visual.  
RFP: Typically used for RFP’s with 2+ Bidders.



- **50%: RFP:** Typically used for RFP's with 2 Bidders or shortlisted.
- **50%: Deal Stage Non-RFP:** Finalizing pricing and visuals to be submitted to client.
- **75%:** Final Pricing and Visual presented to client for review/sign-off. Awaiting green light from client.
- **90%:** RFP Awarded. Waiting for POs/Deposits to go to OE.
- **90%:** Non-RFP Deals also approved. Waiting for POs/Deposits to go to OE.

**Deal Owner:** Sales, AM, or BD

**Deal Location for SKG:** "Location" will be based on where the deal/client is located.

**Deal Description:** Describe what you know about the deal

**Close Date:** *Booking Date*

**Invoice Date:** Date we are going to invoice the customer. **(Not needed for "Lead")**

**Invoice Timing:** Standard terms would be *"Invoice Upon Delivery"*. Sometimes due to client agreements, different invoice timings are selected, which would make the Install Date and Invoice Date different. **(Not needed for "Lead")**

**Deposit Requirement:** How much deposit are we requiring (0%, 50%, 100%) **(Not needed for "Lead")**

**Margin/GP%:** Must be entered as a whole number

**Knoll Cost:** All other costs can be added now but are not required to open a deal. If there is a field with no cost, you **MUST** enter \$0 for total sell and total cost to calculate.

**A&D, Broker/PM, and GC Contacts and Companies:** These are required at every stage if known, if not know please select "N/A".

*Other Properties:*

- **SKG Coordinator** can be added directly in the **Deal record**
- **Square Feet** can be added directly in the **Deal record**



*Additional properties are required as you move through the pipeline, refer to the “Hub Spot - Deal Pipeline Guide” for those exact properties and when they are required.*