



HubSpot – Deal Pipeline %'s Definitions

Lead: Potential opportunity with no official deal assigned yet. We are finding out who the key players are and figuring out if we want to pursue. You have 10 days to flush this out. Design and marketing should not be engaged yet, first two tabs of the Workbook and Spark should be used. 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. Monetary value should be added to the deal now. No Design engagement yet. This should be selling activities, budgetary exercises, thought starters. Log activities in HubSpot.

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. Establish a client relationship at this point (very important). Find out who we are competing with. At this point, the Project Goals should be defined in the Workbook.

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. At this stage, strategizing should be happening. Pricing strategy should be established. Architectural, Technology, and Furniture options should be discussed and be presented.

75%: Greater chance of winning than losing. Final Pricing and Visual presented to client for review/sign-off. Awaiting green light from client. All obstacles in the way should be identified, and you should be well into the Workbook.

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.

Review the T&C's of the deal and have all needed conversations (include leadership if needed). The Project Goals tab needs to be revisited to ensure they are on track.