



## Hubspot User Guide

Werner Schoeman

7/23/2025



# Feedback & Questions

We value  
your input!

[Click here](#)

# Agenda

- 1 About Hubspot
- 2 Important resources
- 3 Teams and permissions
- 4 Configuration settings
- 5 Data model
- 6 Navigating Hubspot (views / filters)
- 7 Data Hygiene





# Agenda

- 8 Creating new records
- 9 Account and contact mapping
- 10 Tracking Marketing & Sales Activities
- 11 Productivity Tools: Tasks
- 12 Pipelines: Leads
- 13 Pipelines: Deals
- 14 Sequences



# Agenda

## 15 Reporting Dashboards



# About Hubspot



# What is Hubspot and how will we use it?

## What it is or will become

- ✓ HubSpot is a cloud-based customer relationship management (CRM) platform
- ✓ Primary platform to manage prospects (pre-KYC)
- ✓ A way to track sales activities (emails, calls, meetings etc.)
- ✓ Automated way of tracking cold outreach & leads
- ✓ Semi-automated way of tracking new opportunities & client elevation (post-KYC)
- ✓ Productivity tool to manage and automate tasks
- ✓ Platform to enable collaboration across teams and regions through data visibility
- ✓ Reporting tool to track sales activities, deals and do forecasting

## What it is NOT and what it will NOT replace

- ✗ Hubspot is not a trading system
- ✗ Replacement for ETRM or bid-offer tool
- ✗ Source of truth for KYC'ed counterparties



# Functionalities MVP

- Comprehensive **database** with one-way sync from DataWarehouse (Contacts, Companies & Trades) and new objects (trades & leads)
- **Prospecting workspace** with sales dashboard with **automated lead tracking**
- Team specific **opportunity pipelines** to track longer commercial opportunities
- Automated “**activity**” **tracking** (Email, meetings (Teams & Zoom), and Zoom telephony)
- Productivity features with (automated) **tasks**
- **Reporting dashboards** on sales activities, leads and pipeline
- **LinkedIn Sales Navigator integration**
- LinkedIn **Sales Navigator integration**
- Automated cold sales outreach (sequences)



## Still to come...

- One-way sync from DataWarehouse (Bid-offers)
- Two-way sync with counterparty services
- Prospecting agent
- And more...

# Important resources



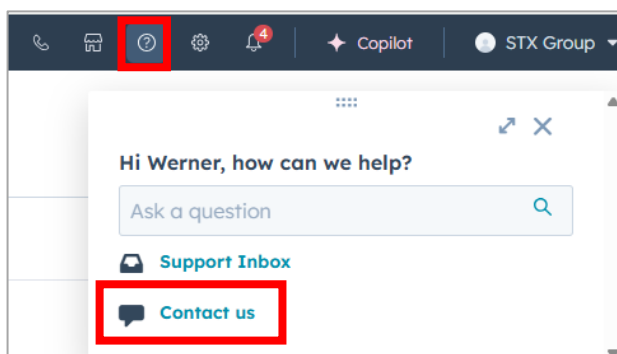
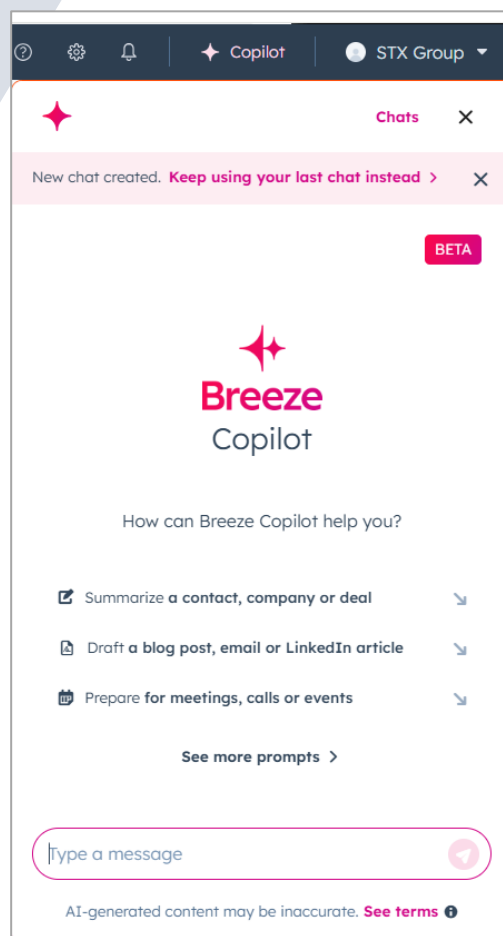
# The Hubspot Academy is your friend!



One of Hubspot's best features is its short, easy to understand trainings. We will post relevant trainings throughout the document, but we highly recommend following the Hubspot Sales Sales Hub Certification course. It's only 1h40min and you can add it to your LinkedIn profile!

[View here](#)

# Breeze Copilot is your personal AI assistant to help you master Hubspot and their support team will get back to you in 24/h



Based on the ChatGPT LLM, Breeze Copilot has been trained on all of Hubspot's functionalities. If you are unsure of how to do something, it can provide you with a detailed explanation and links to relevant resources you might find useful. It can even create some basic reports to get you started!



# Teams and permissions



# User profiles & teams

## Standard Licenses

**Costs:** Free

- View all contact & company records
- View, edit & delete their team's deals, tasks, email correspondence & notes
- Manually log sales activities (calls, meetings, calls etc.)
- Access reports
- Use the Hubspot mobile app
- Management / Strategy profiles have additional access to view other teams' deals

[Learn more](#)

## Sales Licenses

**Cost:** €1k

### Standard license PLUS

- Connect Outlook email to track correspondence
- Connect Outlook calendar to track meetings and use the meeting scheduler tool
- View and manage leads
- Email sequences

### Post MVP

- Sales templates & snippets
- Forecasting tool

# Teams

- Simplifies reporting with team specific dashboards
- Joint Meeting scheduling links
- Access controls



# Configuration settings





# Logging in

Hubspot is single-sign-on (SSO) using your Microsoft account and password

Remember to use the long form!

✓ Werner.schoeman@stxgroup.com

X wschoeman@stxgroup.com

If prompted, select:

✓ STX Group

X Sandbox

Which account would you like to continue to?

	NAME	DOMAIN
<input type="radio"/>	STX Group Sandbox ★	stx-group-sa... 145644073
<input checked="" type="radio"/>	STX Group	stxgroup.com 27215429

Continue with this account

HubSpot

Don't have an account? [Get started free](#)

**Login faster and safer to your HubSpot account**  
Next time we'll remember how you'd like to sign in so you can skip entering an email. You can always go back to [classic login](#).

Email address  
werner.schoeman@stxgroup.com

Next

Sign in with Google

Sign in with Microsoft

Sign in with Apple

Log in with SSO

HubSpot

Don't have an account? [Get started free](#)

**Login faster and safer to your HubSpot account**  
Next time we'll remember how you'd like to sign in so you can skip entering an email. You can always go back to [classic login](#).

Welcome,  
werner.schoeman@stxgroup.com [Change](#)

☐ Remember me

Sign in with Google

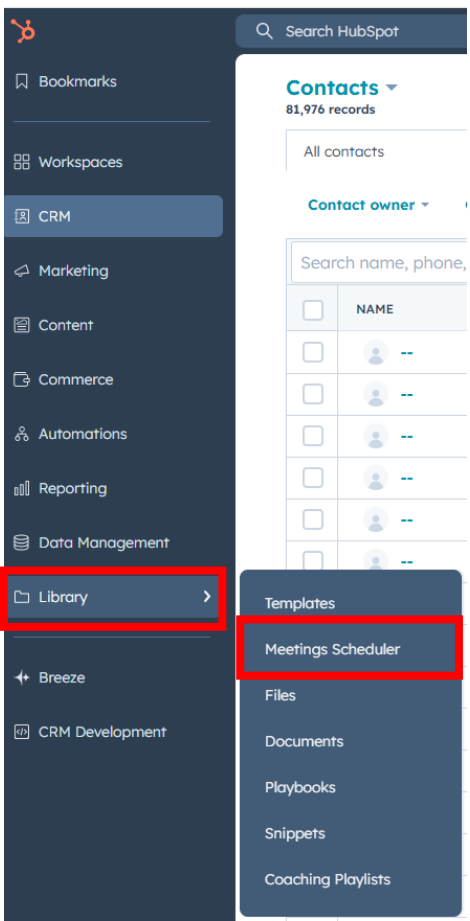
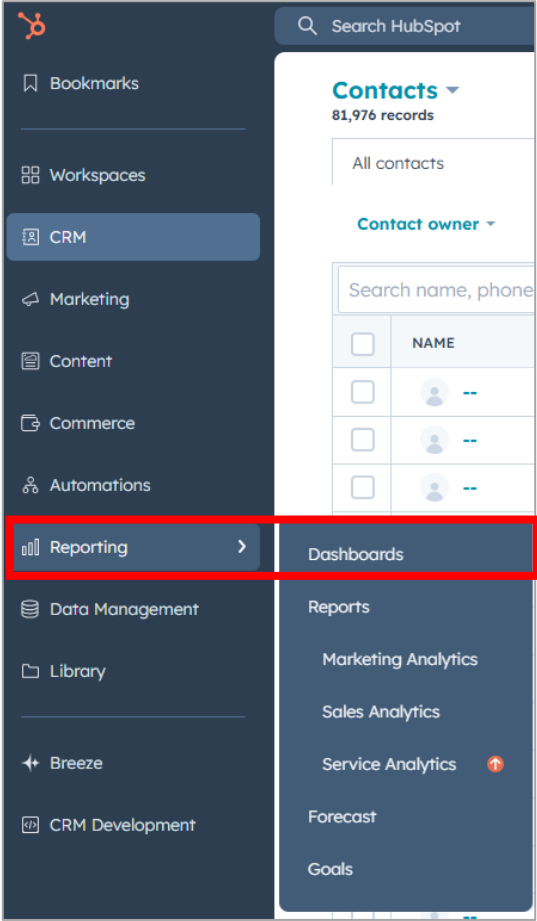
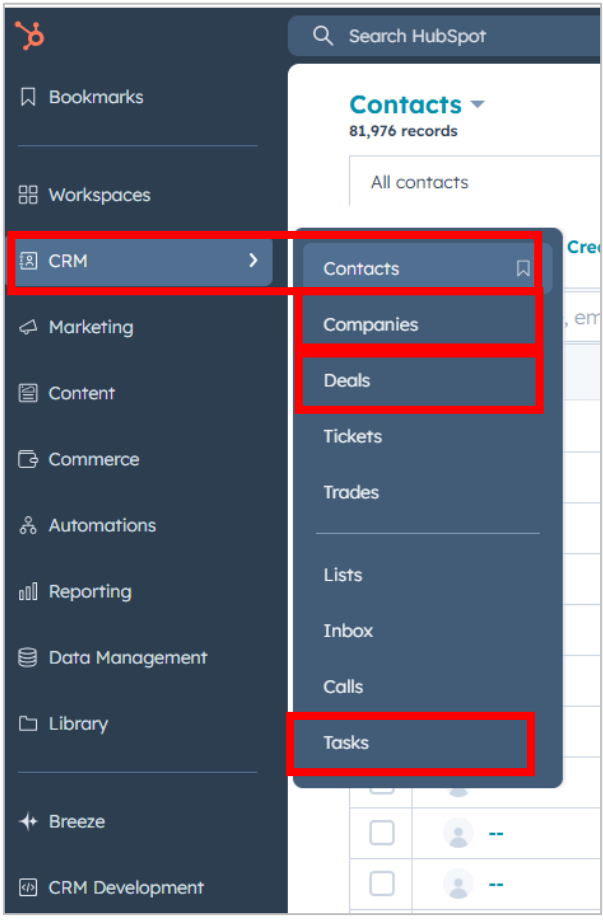
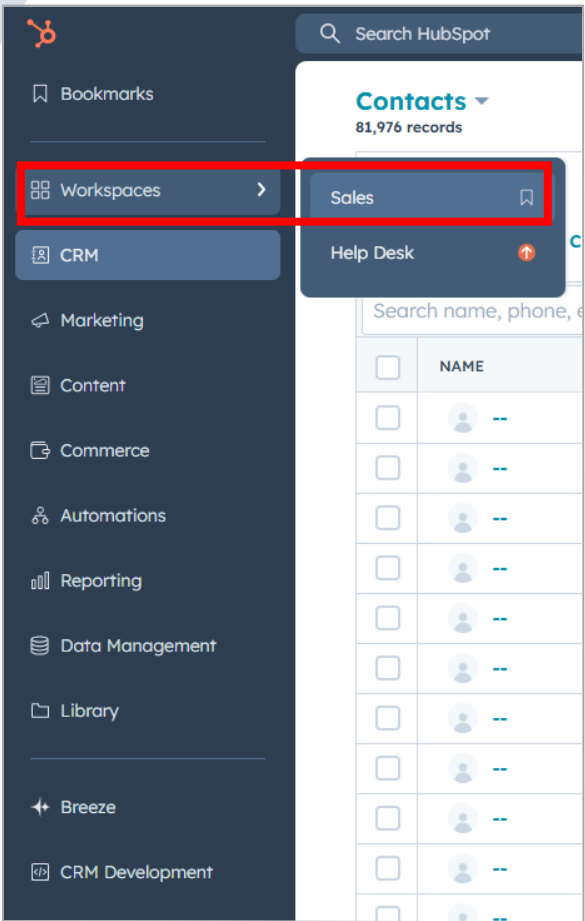
Sign in with Microsoft

Sign in with Apple

Log in with SSO



# Navigating Hubspot: Which areas you will use as part of the MVP



# Your profile and the most important settings

## Basic info

Default homepage

General

Profile

Email

Calling

Calendar

Task

These preferences only apply to you.

Global

This applies across any HubSpot accounts you have.

Profile Image

First name

Werner

Last name

Schoeman

Language

English

Date, time, and number format

Format: March 27, 2025, 03/27/2025, 6:50 AM EDT, and 1,234.56

United States

Phone number

We may use this phone number to contact you about security events. Please refer to our privacy policy for more information

US +1

Defaults

This only applies to this HubSpot account.

Default Home Page

Dashboards

## Email (Sales users only!)

Connect Outlook, add email signature, never log

General

Profile

Email

Calling

Calendar

Tasks

Security

Automation

These preferences only apply to you. For account level email management, go to [email logging settings](#).

★ Pro tip

Get the new add-in for Office 365 to use HubSpot in your Outlook. [Get add-in](#)

Email

Connect your personal email accounts to HubSpot to log, track, send, and receive emails in the HubSpot CRM. To manage any team emails, go to [inbox settings](#).

EMAIL

wernerschoeman@stxgroup.com

Inbox type: Outlook 365

Connect personal email

Configure

Add email alias

An email alias allows emails sent outside of HubSpot to be associated with your user. [Learn more](#)

Manage email signatures

Your signature will be used in one-on-one emails through the HubSpot CRM and as a personalization token for marketing emails.

☐

Include unsubscribe link **RECOMMENDED**

Include a link at the bottom of your emails allowing recipients to unsubscribe. It will help you stay compliant with local spam laws and improve deliverability.

[Edit unsubscribe link](#)

Prospecting agent

☒

Enable agent access

Enable the prospecting agent to send emails using your inboxes. [Learn more](#)

Never Log

Emails sent to addresses on this list will not automatically be saved to your CRM. There are some cases where emails sent to or from these addresses will be saved to your CRM, but they will not be associated to contacts on this list. [Learn more about never log list](#). To manage your never log list for all users, go to your [email logging settings](#).

Search emails or domains

View: All Domains and Emails

## Calendar (Sales users only!)

Connect Outlook, sync calendar, enable meeting scheduling pages & OoO, customize domain

General

Profile

Email

Calling

Calendar

Tasks

Security

Automation

These preferences only apply to you.

Calendar

Connect your calendar to use HubSpot Meetings and calendar sync.

ACCOUNT

wernerschoeman@stxgroup.com

Connected

Account Settings

Manage your calendar accounts

☒

Calendar Sync

Calendar sync logs new meetings from your primary calendar to existing contacts in HubSpot.

☒

Meeting Scheduling Pages

A personal scheduling page that allows contacts to book available times directly to your account's primary calendar.

☒

Out of office calendar sync

Keep out of office dates in sync between HubSpot and your connected calendar. [Manage out of office](#)

Meetings

Customize your HubSpot Meetings URL and domain.

Meetings URL

Your new meetings URL will only apply to future meetings and won't affect links created before.

connect.stxgroup.com/meetings/ werner-schoeman

Meeting domain

Previously sent links are still accessible from their old locations.

connect.stxgroup.com

Default meeting link

The default meeting link is used for personalization tokens and can't be deleted.

Schedule meeting with Werner

Scheduling pages

You can turn off this feature, which will disable all scheduling pages owned by your user.

[Turn off](#)

## Task

Set default preferences

General

Profile

Email

Calling

Calendar

Tasks

Security

Automation

These preferences only apply to you.

Defaults

Set preferences for task creation.

Due date

In 3 business days

Due time

8:00 AM

Reminder

One hour before

Follow-up tasks

Set preferences for follow-up reminders.

☒

Get prompted to create a follow up task every time you complete a task from a list view

☐

Get prompted to create a follow up task every time you disqualify a lead

© STX Commodities B.V.

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# Security settings & email logging

General

Profile

Email

Calling

Calendar

Tasks

Security

Automation

These preferences will only be applied to you. For account security settings please go to [account settings](#).

Security

Set preferences related to login and your personal account security.

Email address

werner.schoeman@stxgroup.com

Edit email address

Password

[Reset password](#)

Last reset on 5/17/2023

Trusted Phone Number

[Add a trusted phone number](#)

Add a phone number used to occasionally verify your identity and receive other security-related alerts. This phone number will never be used for sales or marketing purposes.

Two-factor authentication (2FA)

[Remove SMS](#)

Primary method

[Set up secondary method](#)

Secondary method

[View backup codes](#)

10 codes remaining

Session Reset

[Log Out of All Sessions](#)

This will log you out of all devices and sessions, including this active one.

Remove from this account

This action will remove your user from this account. If you're part of other accounts, you'll still have access to them.

Remove me from this account

Permanently Remove

Delete my user account

Please ensure your security settings is updated, including adding a trusted phone number and two-factor authentication!

## Email logging

When you log an email, it becomes visible to your entire team. Logging sensitive or inappropriate emails can have serious consequences. **Never log emails that include confidential information**—such as correspondence with Legal, Tax, HR, or Finance providers, or messages containing personal details like salaries. Consequences can include: Breach of privacy legislation, commercial damages, loss or legal privilege etc.

To prevent accidental email logging we have taken the following precautions:

- We blacklisted internal domains so correspondence with colleagues cannot be logged,
- We blacklisted all our HR, Legal, and Tax advisors,
- We made email logging opt addition, so you need to use your own discretion when logging an email.

Additionally, please update your personal “never log” list (see previous slide for instructions). Use this to block specific domains—such as personal email addresses you might use when contacting family or partners from your work account, or domains of providers involved in sensitive discussions like HR. This helps prevent accidental logging and potential embarrassment.



# Connecting Outlook 365

General

Profile | **Email** | Calling | Calendar | Tasks | Security | Automation

These preferences only apply to you. For account level email management, go to [email logging settings](#).

**Email**

Connect your personal email accounts to HubSpot to log, track, send, and receive emails in the HubSpot CRM. To manage any team emails, go to [inbox settings](#).

- ✓ Send and schedule emails from HubSpot
- ✓ Log email replies to HubSpot automatically
- ✓ Suggest follow-up tasks and capture contact details from your email  
Requires inbox automation

[Connect personal email](#)

Save time in HubSpot and your inbox

- Send and schedule emails from HubSpot
- Log email replies to HubSpot automatically
- Suggest follow-up tasks and capture contact details from your email  
Requires inbox automation

☒ Turn on inbox automation  
[Learn more](#)

[Connect your inbox](#)

Set up your email account

Email address \*

werner.schoeman@stxgroup.com

[Next](#)

Automatically capture contact details to update your records, and get follow-up task suggestions. You'll be opted in to new features in the future.  
[Learn more](#)

STATUS INBOX AUTOMATION [?](#) DEFAULT SIGNATURE [?](#)

Enabled ☒ Use global default

**werner.schoeman@stxgroup.com**  
is now connected to HubSpot

Did you know?  
HubSpot has extensions for [Gmail](#) and [Outlook](#) that let you quickly access your CRM and sales tools from within your own inbox. Stop switching tabs, and get your work done faster.

[Download Extension](#) [No, thanks](#)

- **Navigate to:** Profile & Preferences > Email > Connect personal email
- Select "turn on inbox automation" > connect your inbox
- Enter your email > next
- Select > Connect Outlook 365
- A pop-up should appear asking you to download the extension for Outlook, select "download extensions"
- Afterwards press refresh to see the connection and enable "inbox automation"

# Outlook extension

Download HubSpot Extensions

Review this matrix to choose the right HubSpot Sales Extension for you. Click 'I need help' to use our wizard to assist you on your selection.

	EXTENSION FOR GMAIL (CHROME)	OFFICE 365 EXTENSION	OUTLOOK DESKTOP EXTENSION
Email provider	Gmail or G Suite	Office 365	Any
Email client	Gmail / G Suite in Chrome	Outlook for Mac Outlook on the web Outlook.com	Outlook for Office 365 Outlook 2016 Outlook 2013 Outlook 2010
Operating system	Mac / PC	Mac / PC	PC
Download	<a href="#">Download</a>	<a href="#">Download</a>	<a href="#">Download</a>

[I need help](#)

Done

HubSpot for Outlook Installation

HubSpot Sales helps you find leads, connect with those leads, and close more deals while managing all your contacts in one central database.

[Start installation](#)

Microsoft Office Customization Installer

**Publisher has been verified**

Are you sure you want to install this customization?

**Name:** [HubSpot Sales for Outlook](#)  
**From:** <https://dl.getsidekick.com/outlook/vsto/Sidekick.vsto>  
**Publisher:** [HubSpot, Inc.](#)

While Office customizations from the Internet can be useful, they can potentially harm your computer. If you do not trust the source, do not install this software. [More information...](#)

[Install](#) [Don't Install](#)

User Account Control

Do you want to allow this app to make changes to your device?

vstor\_redist.exe

Verified publisher: Microsoft Corporation  
File origin: Hard drive on this computer

Show more details

To continue, enter an admin username and password.

User name

Password

Domain: STXSERVICES

[Yes](#) [No](#)

- Select download **Outlook desktop extension**
- Click through to continue installation
- You will be asked if you want to let vstor\_redist.exe make changes to your device. Just click "no" and the installation will continue

# Connect your Calendar

General

Profile Email Calling **Calendar** Tasks Security Automation

These preferences only apply to you.

**Your calendar is disconnected.** Connect it to access all the features in the meetings tool.

**Calendar**

Connect your calendar to use HubSpot Meetings and calendar sync.

- ✓ Send meetings directly from HubSpot
- ✓ Log outgoing meetings automatically
- ✓ Sync your calendar so contacts can schedule time with you  
Requires Calendar Sync
- ✓ See your HubSpot tasks in your calendar  
Requires an additional step with task sync. Only available on Sales Starter and up plans.

[Connect your calendar](#)

**Connect your calendar**

☒ **Calendar Sync**

Calendar sync logs new meetings from your primary calendar to existing contacts in HubSpot.

**Tasks Calendar Sync**

Create and connect a new calendar to see HubSpot tasks on your calendar. [Learn more.](#)

[Connect your calendar](#)

☒ **Meeting Scheduling Pages**

A personal scheduling page that allows contacts to book available times directly to your account's primary calendar.

**Availability Calendars**

Select which calendars you want to use to determine your availability for bookings

[Calendar](#)

Don't see your calendar? Your calendar must be tied to the same email address you're using with the meetings tool. [Learn more.](#)

☒ **Out of office calendar sync**

Keep out of office dates in sync between HubSpot and your connected calendar. [Manage out of office](#)

**Meetings**

Customize your HubSpot Meetings URL and domain.

**Meetings URL**

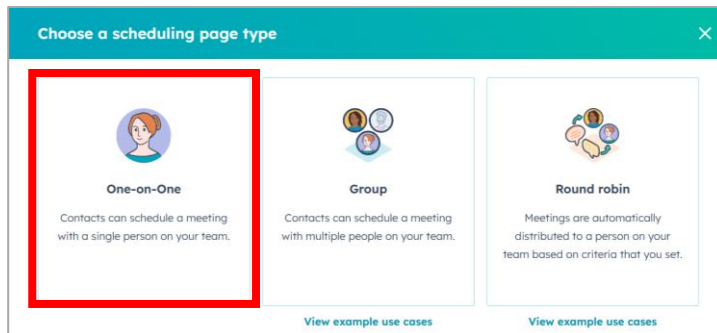
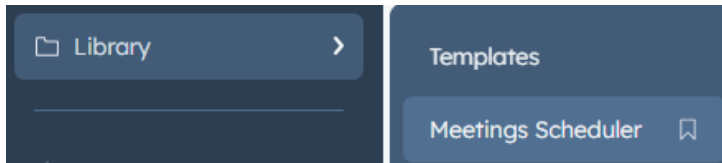
Your new meetings URL will only apply to future meetings and won't affect links created before.

connect.stxgroup.com/meetings/

- **Navigate to:** Profile & Preferences > Calendar > Connect your calendar
- Select Microsoft Outlook > Connect your calendar
- Accept terms and log into Microsoft account to approve
- Make sure "calendar sync", "meeting scheduling pages" and "out of office calendar sync" is turned ON
- Update your meeting URL

# Set up a Meeting Scheduling page

[Learn more](#)



**Overview**

Internal name \* ⓘ

Organizer ⓘ  
Werner Schoeman (me)

Event title ⓘ  
Meeting STX Group Company: Company name [Personalize](#)

Location ⓘ

[Add videoconference link](#) [Remove](#)

**Cancel and reschedule**  
Include cancel and reschedule links in the event description ☒

**Description** ⓘ  
Meeting with Contact: First name Contact: Last name and Werner Schoeman

Need to make changes?  
• Reschedule: [Reschedule Link](#)  
• Cancel: [Cancel Link](#)

**B I U T** | [Personalize](#)

- **Navigate to:** Library > Meeting scheduler
- Select one-on-one (you can set up group meetings if you meet together with another team member often)
- Fill in your preferences:
  - **Internal name:** This is not seen externally. Be descriptive so you know which setup it refers to, e.g. 30 min or 60 min meetings
  - **Event title:** This is the name of the meeting. Use personalization tokens, such as company name, so you can easily see who the meeting is with.
  - **Location:** Add your Teams / Zoom meeting scheduling link
  - Enable cancelation and rescheduling in case the person can no longer make it.
  - **Description:** Include personalization tokens to remind you who the meeting is with.



# Setting up your Meeting Scheduling page

Learn more

Scheduling page link ⓘ

https://connect.stxgroup.com/mee... test

Collect payments

Attendees will be asked to pay after they choose a time.

Schedule

Form

Confirmation

Scheduling title

Meet with Werner Schoeman

Duration options

30 min ×

Your time zone

UTC +01:00 (Europe) Central European Time

Availability window

Monday

from

9:00 AM

to

5:00 PM

Tuesday

from

9:00 AM

to

5:00 PM

Wednesday

from

9:00 AM

to

5:00 PM

Thursday

from

9:00 AM

to

5:00 PM

Friday

from

9:00 AM

to

5:00 PM

+ Add hours

Consider working hours

Check working hours to know when users are available for meetings. Users will not be booked outside of their working hours.

> Additional settings

Scheduling page link ⓘ

https://connect.stxgroup.com/mee... test

Collect payments

Attendees will be asked to pay after they choose a time.

Schedule

Form

Confirmation

Ask prospects and customers a few qualifying questions as they are booking meetings with you.

First Name

Required

Last Name

Required

Email

Required

+ Contact property

+ Custom question

CAPTCHA (spam prevention)

Include a CAPTCHA challenge to your booking form to prevent spam.

Block free email domains

Block free email domains from booking meetings. [See list](#)

+ Block specific domains

Allow guests

Allow customers to include other guests to attend your meeting.

[Learn more](#)

Data privacy and consent [Learn more](#)

Add consent checkboxes and text to your form to follow GDPR and other data privacy laws.

Customize

Preview

## Pay attention to the following fields when configuring your meeting preferences

- Scheduling page link title
- Meeting duration options (how long the meeting will last)
- Available window for when the meeting can be scheduled (the system will detect if you are free during this window)
- Enable working hours
- Under form:
  - Allow guests
  - Disable data privacy and consent checkbox (it's not needed as you will be communicating with known prospects or clients only)
- Click "next"
- Under automations, disable confirmation email (it's not needed as they will receive a separate email with the meeting invite) as well as pre-meeting reminder (it's not needed)
- Click "create scheduling link"

Automation

Confirmation email

Send a confirmation email to attendees immediately after they schedule a meeting.

Send test email

Test email will be sent to wernerschoeman@stxgroup.com

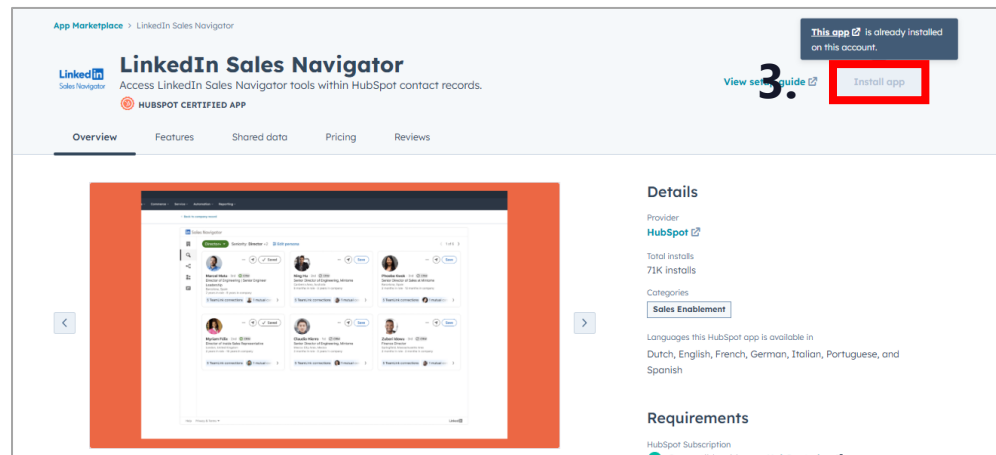
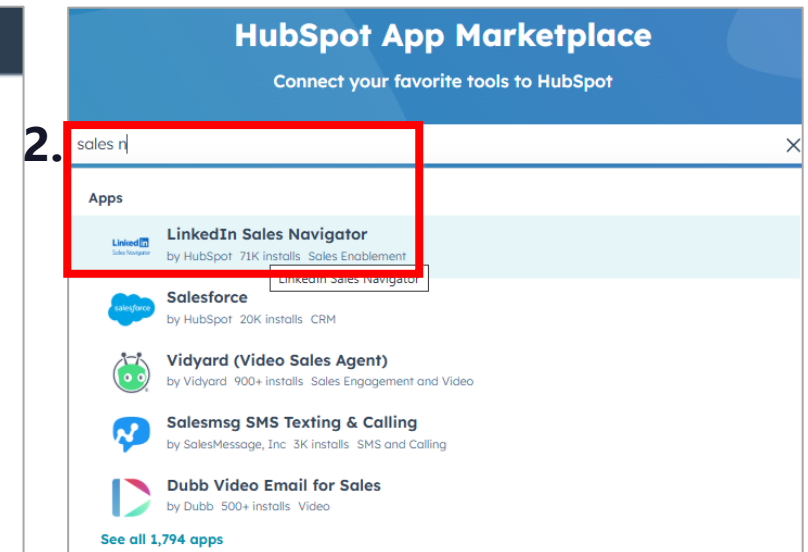
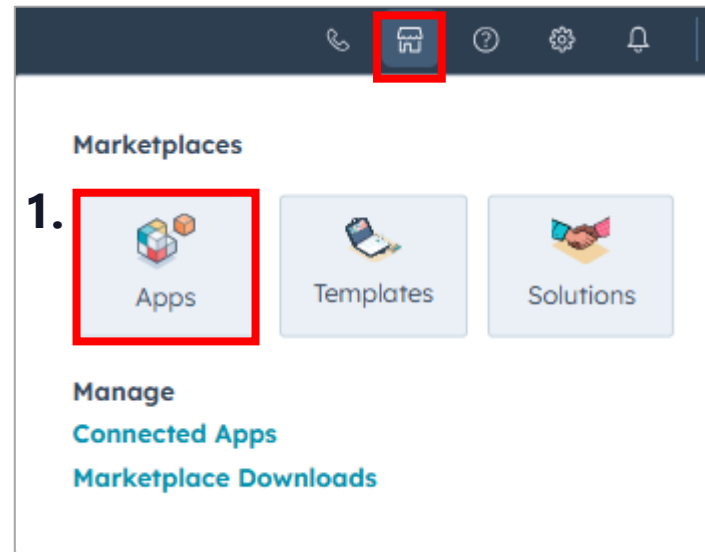
Pre-meeting reminder

Send an email reminder to attendees before a meeting starts.

# Installing the Sales Navigator App

(Only available to users with a sales license & Sales Navigator license)

1. Navigate to Apps in the top right-hand of the screen
2. Search for Sales Navigator
3. Select install



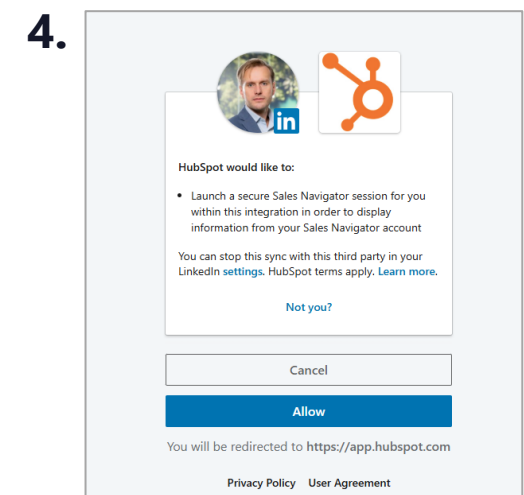
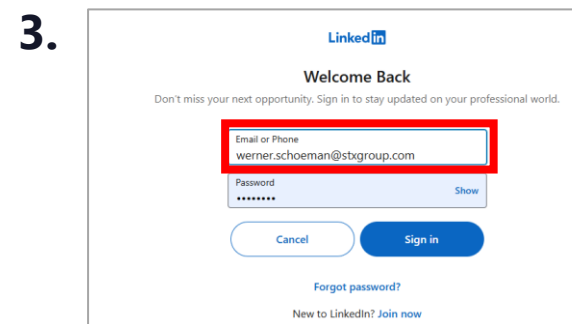
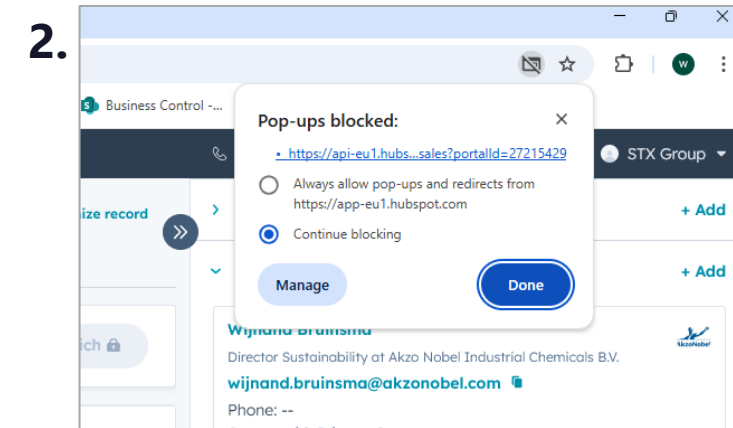
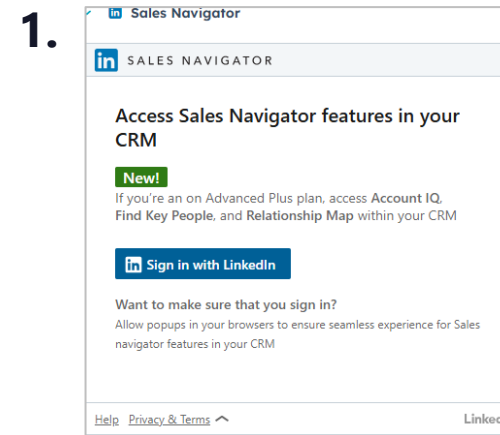
# Activating LinkedIn Sales Navigator

(Only available to users with a sales license & Sales Navigator license)

Everyone needs to individually connect their LinkedIn Sales Navigator account to Hubspot:

1. Navigate to a contact record and view the LinkedIn Sales Navigator plug in on the right-hand side of the records
2. Ensure pop-ups are allowed
3. Sign in with your STX email

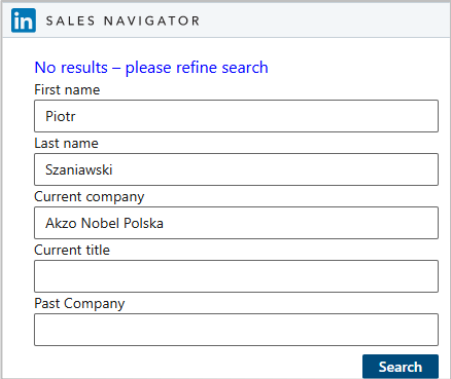
Please note that HubSpot connects to your professional LinkedIn Sales Navigator account, not your personal LinkedIn account. It will only track and log messages sent via Sales Navigator — not through your private LinkedIn account.

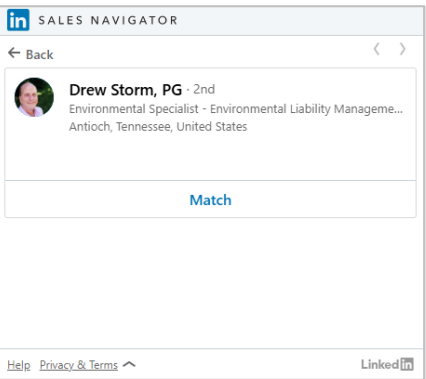


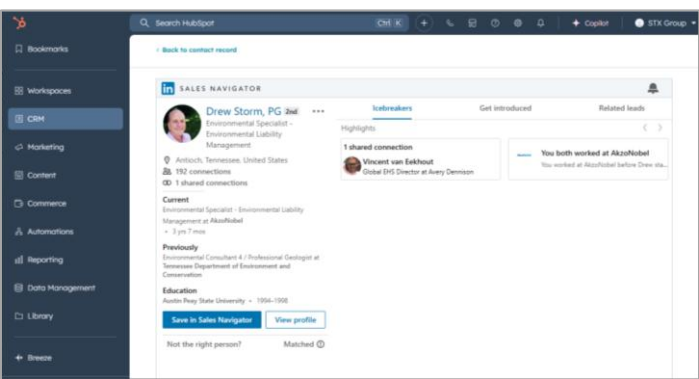
# Using LinkedIn Sales Navigator

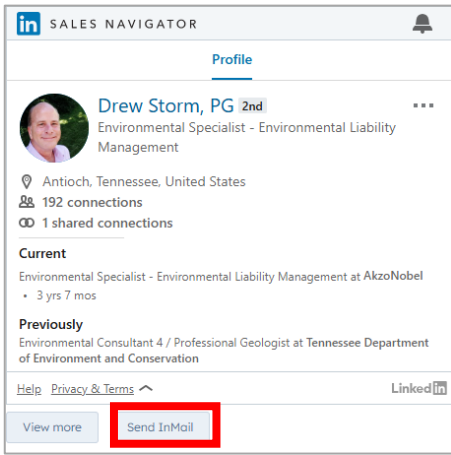
1. Search for contacts
2. Match
3. View profile in Hubspot
4. Send (and log) InMails directly from Hubspot

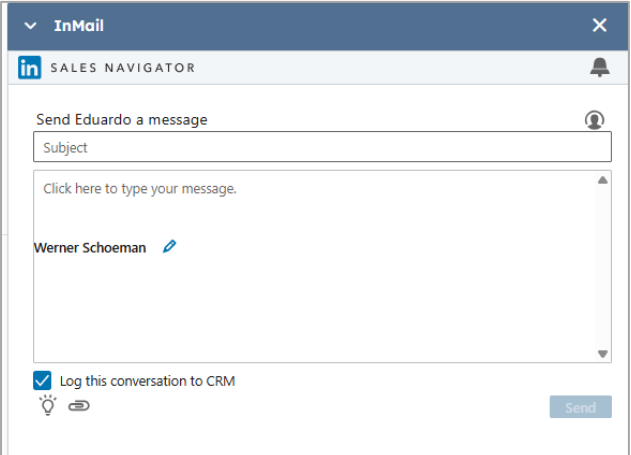
The first time you log a message, you will be asked to connect your Sales Navigator to Hubspot.

1. 

2. 

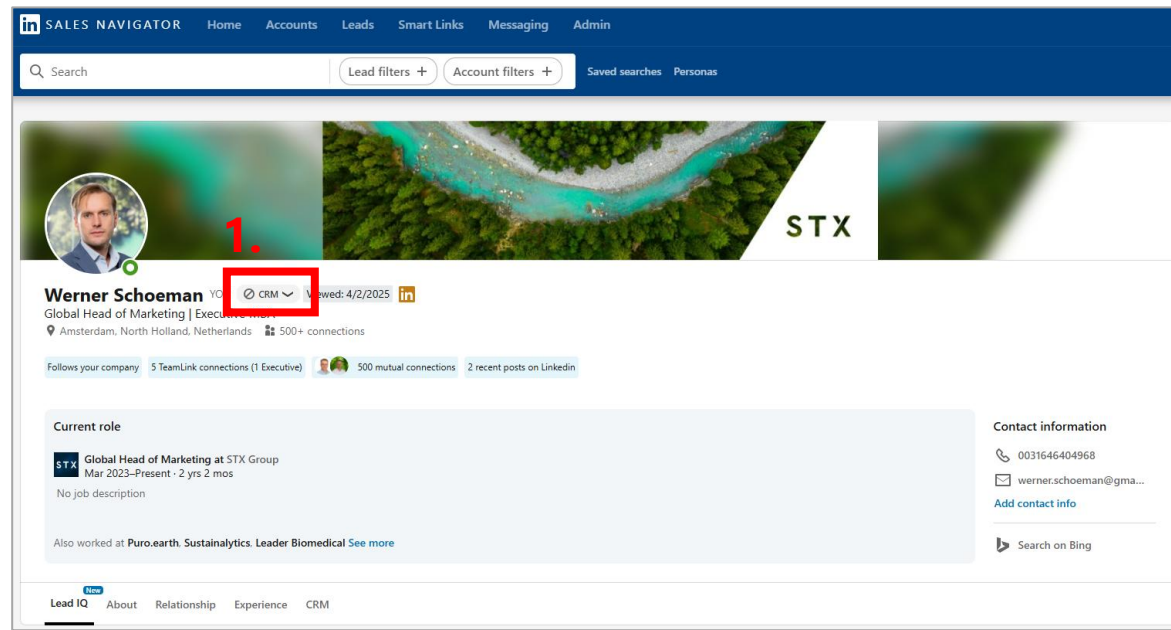
3. 

4. 



# Create or match CRM contact records directly in Sales Navigator

1. Select the CRM drop-down
2. Create a record for contacts that do not yet exist in the CRM (it will automatically check for potential duplicates)
3. Match the record to the CRM record to populate Sales Navigator with CRM content and to be able to log InMails



2.

The screenshot shows the 'Create new contact' form. The form includes a search bar at the top with the name 'Werner Schoeman'. Below the search bar, the 'Record type' is set to 'Contact'. The form fields are organized into two columns. The left column contains 'First Name \*' (Werner), 'Country \*' (Netherlands), 'Email \*' (with a red error message 'Email is required'), 'Account \*' (STX Group, with a red error message 'Account is required'), and 'Stakeholder Role' (Select an opportunity first). The right column contains 'Last Name \*' (Schoeman), 'Job Title' (Global Head of Marketing), 'Phone' (empty), 'Opportunity' (Select an account first), and 'Contact Owner' (Werner Schoeman). A 'Create' button is located at the top right of the form. A note at the bottom states '\* indicates a required field'.

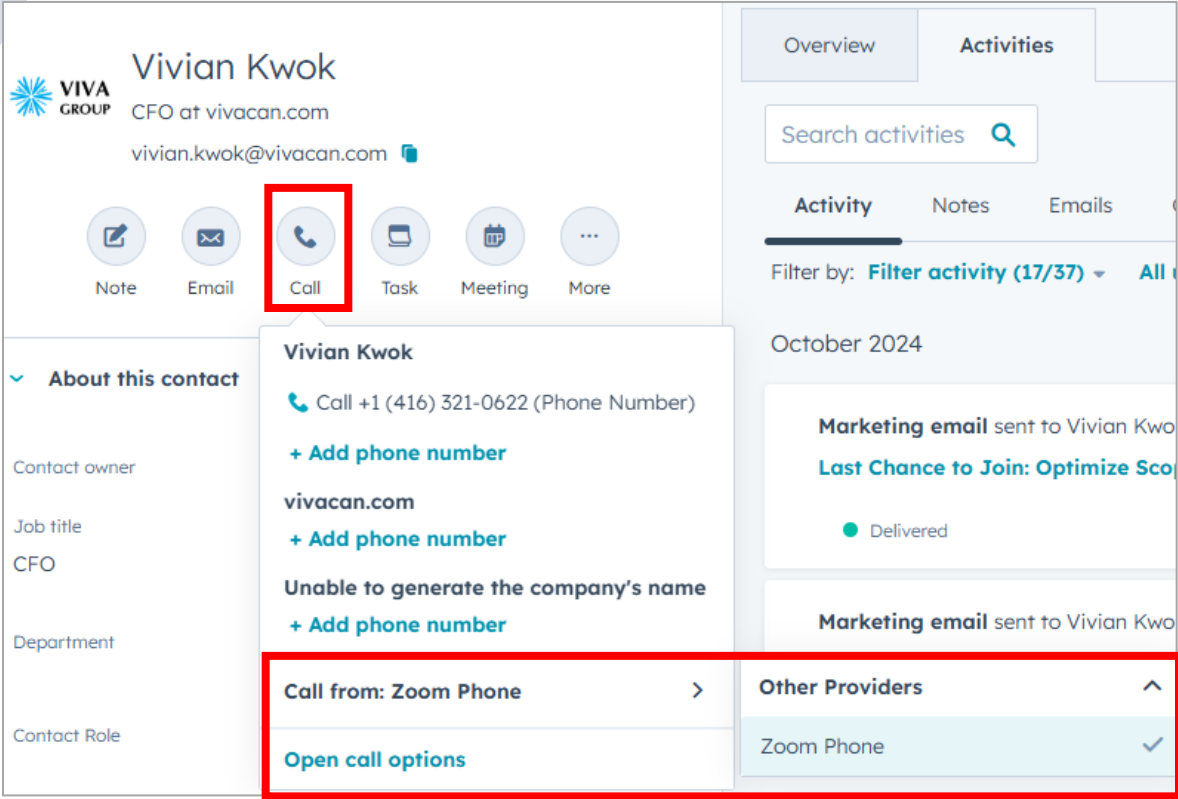
3.

The screenshot shows the 'Match CRM record for Werner' form. The form includes a search bar at the top with the name 'Werner Schoeman'. Below the search bar, the name 'Werner Schoeman' is displayed with a 'Match' button. A note at the top states 'Make sure the CRM record is matched with the right LinkedIn profile to get insights on the right lead/contact. Learn more'. At the bottom, a link 'No match? Create new CRM record' is provided.

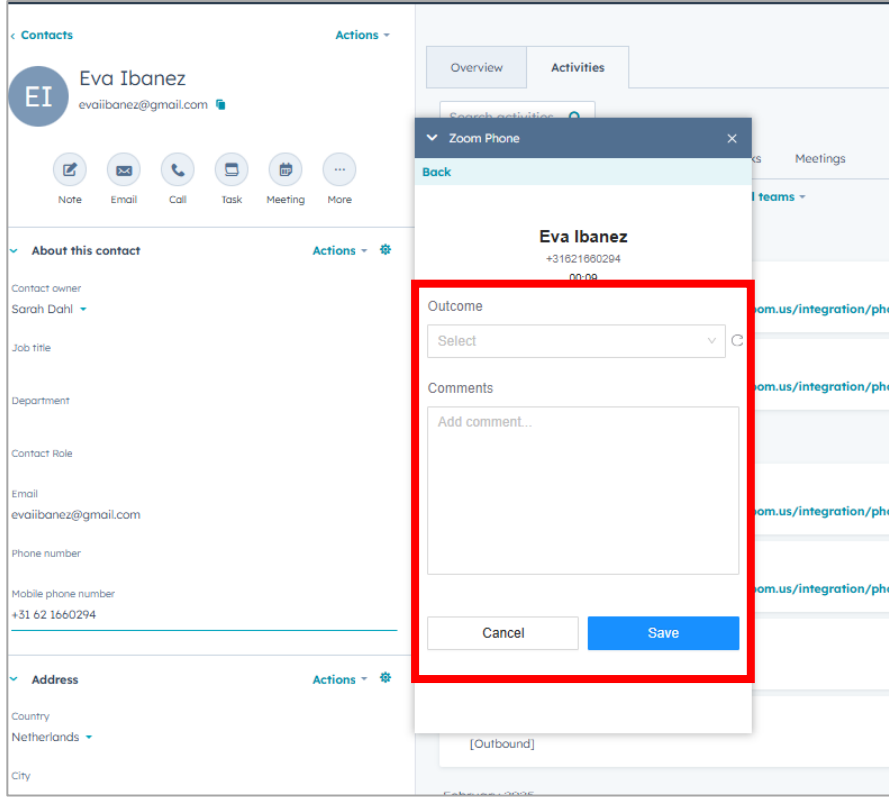


# Activating Zoom Phone

The first time you try to call, you may need to connect to Zoom Phone



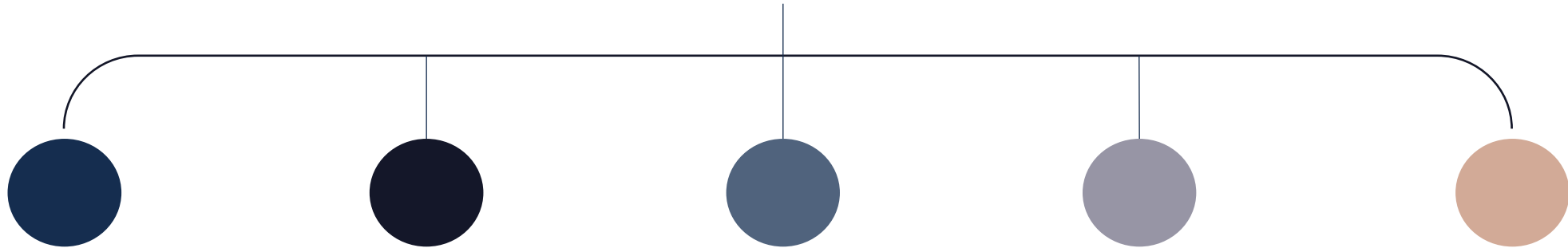
Once you connect, the call will be logged by default and you can make notes and choose /choose not to record calls.



# Data model



# Our Data Model



## Contacts

An individual at a client or prospect company. Each contact record includes key details such as name, email address, job title, phone number, and other relevant information.

## Companies

A record representing a client or prospect organization. It includes key information such as company name, industry, size, location, website, and associated contacts or deals.

## Leads (sales users only!)

A record used to track early-stage commercial interest and outreach. Leads are always attached to a contact or company and help prioritize unqualified prospects. This object is only available to users with a Sales Hub license and is designed reaching out to a large number of companies or contacts. It is not needed when there is an existing relationship in which case you can go directly to deals.

## Opportunities (Deals)

A record used to track a potential or ongoing commercial opportunity. It captures key details such as the deal name, stage, value, expected close date, and links to associated contacts and companies, along with related activities and notes. Opportunities should be created for longer sales cycles or strategic opportunities—not for short-term, transactional trades.

## Trades

A custom object that makes trades visible on company records.

## Bid-offer (post-MVP)

A custom object that makes bids and offers visible on company records.



## Navigating Hubspot (views & filters)





# Record filters and views (applies to contacts, companies and deals)

Select a pre-created view

OR

Quickly filter records on fields such as owner, create date, activity or any other of the fields in Hubspot.

Select filter criteria

Customize quick filters

Contacts ▾  
73,042 records

All contacts × My contacts Unassigned contacts

Contact owner ▾ Create date ▾ Last activity date ▾ Lead status ▾ + More ≡ Advanced filters

Search name, phone, email Q

<input type="checkbox"/>	NAME ▾	EMAIL ▾	PHONE NUMBER ▾	CONTACT OWNER ▾
<input type="checkbox"/>	Rithika Ka... <a href="#">Preview</a>	<a href="mailto:rithikakamath@gmail.com">rithikakamath@gmail.com</a>	353894865482	No owner
<input type="checkbox"/>	<a href="mailto:jan.gilot@power-puls...">jan.gilot@power-puls...</a>	<a href="mailto:jan.gilot@power-pulse.be">jan.gilot@power-pulse.be</a>	--	Felix van den Horst (feli...
<input type="checkbox"/>	Sarah Luccioni	<a href="mailto:sarah.luccioni@filpar.com">sarah.luccioni@filpar.com</a>	--	Henry Houyvet (henry,h...
<input type="checkbox"/>	Terry Ndirangu	<a href="mailto:terri.njeri@outlook.com">terri.njeri@outlook.com</a>	01628421045	No owner
<input type="checkbox"/>	<a href="mailto:c.duvermy@notrelec.fr">c.duvermy@notrelec.fr</a>	<a href="mailto:c.duvermy@notrelec.fr">c.duvermy@notrelec.fr</a>	--	Felix van den Horst (feli...
<input type="checkbox"/>	Smaranda Birca	<a href="mailto:s.m.birca@gmail.com">s.m.birca@gmail.com</a>	+31 62 3520342	No owner
<input type="checkbox"/>	Ann Demaegdt	<a href="mailto:ann.demaegdt@oleon.com">ann.demaegdt@oleon.com</a>	+32 475 82 76 30	Felix van den Horst (feli...
<input type="checkbox"/>	Guillaume MERCIER	<a href="mailto:guillaume.mercier@chopar...">guillaume.mercier@chopar...</a>	+41 22 939 83 77	No owner
<input type="checkbox"/>	Gleb Iudin	<a href="mailto:glebdn3@gmail.com">glebdn3@gmail.com</a>	+31 62 5453851	No owner
<input type="checkbox"/>	Mahora Sapim	<a href="mailto:mahora.sapim@laposte.net">mahora.sapim@laposte.net</a>	+33 7 59 62 28 22	No owner
<input type="checkbox"/>	Larissa	<a href="mailto:larissavanlieshout@hotmail...">larissavanlieshout@hotmail...</a>	--	No owner
<input type="checkbox"/>	Ralf Qiriako	<a href="mailto:rqiriako@gmail.com">rqiriako@gmail.com</a>	+31 63 4190961	No owner
<input type="checkbox"/>	kee-nic.li@stxgroup.c...	<a href="mailto:kee-nic.li@stxgroup.com">kee-nic.li@stxgroup.com</a>	--	No owner

# Using advanced filters

- 1. Add elements to filter on
- 2. Select filter criteria

Select filter criteria

Contacts73,042 records

All contacts

My contacts

Unassigned contacts

Contact owner

Create date

Last activity date

Lead status

+ More

Advanced filters

Search name, phone, err

	NAME	EMAIL	PHONE NUMBER	CONTACT OWNER
	RK Rithika Ka...	rithikakamath@gmail.com	353894865482	No owner

All Filters

Advanced Filters

Discard

Group 1

Contact priority is any of Very High

AND

Type is any of Seller

AND

+ Add filter

OR

+ Add filter group

Edit filter

Type

is any of

Seller

# Tailor your contact, company and deal views

- 1. Edit the columns you want to see
- 2. Make a copy of the newly created view
- 3. Save the new view

Contacts ▼  
82,091 records

Data Quality

Actions ▼

Import

Create contact

All contacts ×

Werner Contact View

+ Add view (2/50)

All Views

Contact owner ▼

Create date ▼

Last activity date ▼

Lead status ▼

+ More

Advanced filters ≡

↶

2.

3.

1.

Edit columns

Search name, phone, email 🔍

Export

<div><div></div><div>NAME</div><div><div></div><div></div></div></div>	<div><div></div><div>COMPANY NAME</div><div><div></div><div></div></div></div>	<div><div></div><div>CONTACT → COMPANIES</div><div><div></div><div></div></div></div>	<div><div></div><div>CONTACT OWNER</div><div><div></div><div></div></div></div>
<div><div></div><div><div><div></div><div></div></div><div>--</div></div></div>	<div><div></div><div>EG Retail (Belgium) BVBA</div></div>	<div><div><div></div><div>EG Retail (Belgium) BVBA</div></div></div>	<div><div></div><div>No owner</div></div>

# Add the view to your profile or use the tailored views we created of deal records for each team

Deals

All dealsUS CertificatesStrive

+ Add view (3/50)

Strive & BD USDeal ownerCreate

Search

TOTAL DEAL AMOUNT  
€17.27M  
Average per deal: €539.56K

Search name or description

DISCOVERY INITIATED 284DISCOVERY COMPLETE

Air Liquide  
Product Interest: EAC,  
Renewable Natural Gas

No activity for 20 hours  
! No activity scheduled

Air Products

CAE - RY25  
Amount: \$20,000  
Product Interest:

Email 2 days ago  
! No activity scheduled

Oceanengineering - 5 Year Strip

HubSpot Provided (6)

Admin Promoted (2)

2.

Associate companies  
RNG EU  
RNG US  
Strive  
US Certificates

Created by others (1)

Create new view

# Company, contact and deal records follow the same design logic

Companies

Actions

N

Nouryon Chemicals LLC

www.nouryon.com

0016102935500

Note

Email

Call

Task

Meeting

More

About this company

Actions

Company owner

Nathan Buckler

Description

Nouryon is a global leader in specialty chemicals, offering essential sustainable solutions worldwide with a strong focus on innovation and sustainability.

LinkedIn company page

https://www.linkedin.com/company/nouryon

Last Traded

01/24/2025

Website URL

https://www.nouryon.com

Company owner backup

Keegan Dean

Commercial Status

Actions

Strive Client Archetype

Overview

Activities

Intelligence

Search activities

Expand all

Activity

Notes

Emails

Calls

Tasks

Meetings

Filter by: Filter activity (7/22)

All users

All teams

February 2025

Email - RE: Indicative proposal biomethane sourcing mandate Nouryon from Yash Chawla

Pin

Copy link

Feb 28, 2025 at 5:58 PM GMT+1

Yash Chawla

to Tejera Vazquez, M. (Martin), Pieter Haage, Felix van den Horst

Sent

Tracking data is not available for this email.

This email is logged but not tracked. Learn more

Great, thanks Martin. Hope the meeting went well and look forward to hearing from you Monday.

Have a great weekend,

Yash

From: Tejera Vazquez, M. (Martin) <martin.tejeravazquez@nouryon.com>

Sent: Wednesday, February 26, 2025 17:37

To: Chawla, Yash <Yash.Chawla@stxgroup.com>

Cc: Horst, Felix van den <Felix.Horst@stxgroup.com>; Haage, Pieter <Pieter.Haage@stxgroup.com>

Subject: Re: Indicative proposal biomethane sourcing mandate Nouryon

Hi Yash thanks for the update.

Regards

I hope you are doing well!

Wanted to follow up regarding our previous conversations on biomethane. I understand you have a meeting later this week with key stakeholders to discuss biomethane.

Customize record

Trades (7)

+ Add

Contacts (4)

+ Add

Dave Davis

Nouryon Chemicals LLC

david.davisjr@nouryon.com

Phone: --

Contact with Primary Company

--

Nouryon Chemicals LLC

stefan.granath@nouryon.com

Phone: --

Contact with Primary Company

Eduardo Nardinelli

Nouryon Chemicals LLC

eduardo.nardinelli@nouryon.com

Phone: --

Contact with Primary Company

Invoices

Nouryon Chemicals LLC

ap.us.invoice@nouryon.com

Phone: --

Contact with Primary Company

View associated Contacts

+ Add

Dec 2023

+ Add

Companies (1)

+ Add

Part (1)

Shows information about the record

Middle panel

Shows a summary of tracked sales activities, i.e. call, meeting, email logs, as well as Marketing activities, i.e. website visits, webinar registrations, newsletter subscriptions etc.

Right panel

Shows associated records, such as related contacts, trades etc.



# With HubSpot, cookied marketing actions—like page views, form submissions, newsletters and downloads—are now also visible

Back

Actions

Susana Carvalho

Group Sustainability Director at Synthomer PLC

susana.carvalho@synthomer.com

Note

Email

Call

Task

Meeting

More

About this contact

Actions

Contact owner

Job title

Group Sustainability Director

Department

Sustainability Manager

Contact Role

Email

susana.carvalho@synthomer.com, carvalho.msusana@gmail.com, L.

Phone number

+39 327 8152152

Mobile phone number

Address

Actions

Country

United Kingdom

City

Lisboa

Postal code

Street address

Opens: 1 Clicks: 1 Replies: 0

Call-to-action

Susana Carvalho viewed the Banner CTA FY25 Q3 - Strive - Sticky banner - CDP webinar on the page Content - thank you page - STRIVE by STX

Nov 4, 2024 at 1:12 PM GMT+1

Page view

Susana Carvalho viewed Case study: Pioneering eco-friendly ammonia | STRIVE by STX and one other page

Nov 4, 2024 at 1:12 PM GMT+1

Viewed Content - thank you page - STRIVE by STX

Nov 4, 2024 at 1:12 PM GMT+1

Viewed Case study: Pioneering eco-friendly ammonia | STRIVE by STX

Nov 4, 2024 at 1:10 PM GMT+1

Form submission

Susana Carvalho submitted FY24 Q4 - Strive - Chemicals - case study - download on Case study: Pioneering eco-friendly ammonia | STRIVE by STX

Nov 4, 2024 at 1:12 PM GMT+1

Updated 9 properties

First name	Susana
Last name	Carvalho
Company name	Synthomer plc
Company Industry	Chemicals
Job title	Group Sustainability Director
Country	United Kingdom
I am interested in:	Company looking for decarbonization solutions
Corporate sustainability / decarbonization solutions	Activate my suppliers, Net-zero and decarbonization training, Renewable Fuels Solutions
Email	susana.carvalho@synthomer.com

Companies (2)

Add

Primary

Synthomer PLC

Company owner: --

Company owner backup: --

Strive global account manager: --

Bondalti Chemical

Company owner: --

Company owner backup: --

Strive global account manager: --

View associated Companies

Leads (0)

Add

Track the prospecting activities associated with this record.

Deals (0)

Add

Sales Navigator

Org Chart (1)

39

# Company enrichment - industry

< Companies

Actions

N

Nouryon Chemicals LLC

[www.nouryon.com](http://www.nouryon.com)

0016102935500

Note

Email

Call

Task

Meeting

More

About this company

Actions

Company owner

Nathan Buckler

Description

Nouryon is a global leader in specialty chemicals, offering essential sustainable solutions worldwide with a strong focus on innovation and sustainability.

LinkedIn company page

<https://www.linkedin.com/company/nouryon>

Last Traded

01/24/2025

Website URL

<https://www.nouryon.com>

Company owner backup

Keegan Dean

Strive global account manager

Overview

Activities

Intelligence

Breeze Intelligence

has data for 15 properties for Nouryon.

Enrich

N

Nouryon

f

in

Company description

Nouryon is a global leader in specialty chemicals, offering essential sustainable solutions worldwide with a strong focus on innovation and sustainability.

Industry

Chemicals

Country

Netherlands

Employees

7,650

Founded year

--

Enrich your CRM with Breeze Intelligence

Harness the power of Breeze Intelligence, with data available on over 200 million contact and company profiles.

Additional firmographic data, for over 50 company and contact

Customize record

>>

Trades (7)

+ Add

Contacts (4)

+ Add

Dave Davis

Nouryon Chemicals LLC

david.davisjr@nouryon.com

Phone: --

Contact with Primary Company

--

Nouryon Chemicals LLC

stefan.granath@nouryon.com

Phone: --

Contact with Primary Company

Eduardo Nardinelli

Nouryon Chemicals LLC

eduardo.nardinelli@nouryon.com

Phone: --

Contact with Primary Company

Invoices

Nouryon Chemicals LLC

ap.us.invoice@nouryon.com

Phone: --

Contact with Primary Company

View associated Contacts

Deals (2)

+ Add

# Deal views are tailored to each team

< Deals

Actions ▾

Baxter - Elevation 2025

Amount: \$300,000

Close Date: 12/31/2025

Stage: Follow-up Agreed ▾

Pipeline: Strive & BD US

Note

Email

Call

Task

Meeting

More

> About this deal

Actions ▾ ⚙

> Opportunity Metrics

Actions ▾ ⚙

> Strive Deal Metrics

Actions ▾ ⚙

> Collaborators

+Add

Overview

Activities

Search activities 🔍

Expand all ▾

Activity

Notes

Emails

Calls

Tasks

Meetings

Filter by: Filter activity (1/21) ▾ All users ▾ All teams ▾

This deal was created by Nathan Buckler

Mar 26, 2025 at 8:34 PM GMT+1

Customize record ⚙

>>

> Companies (1)

+ Add

Primary

Baxter Healthcare Corporation

Company owner: Nathan Buckler

Company owner backup: --

Strive global account manager: --

View associated Company

> Contacts (2)

+ Add

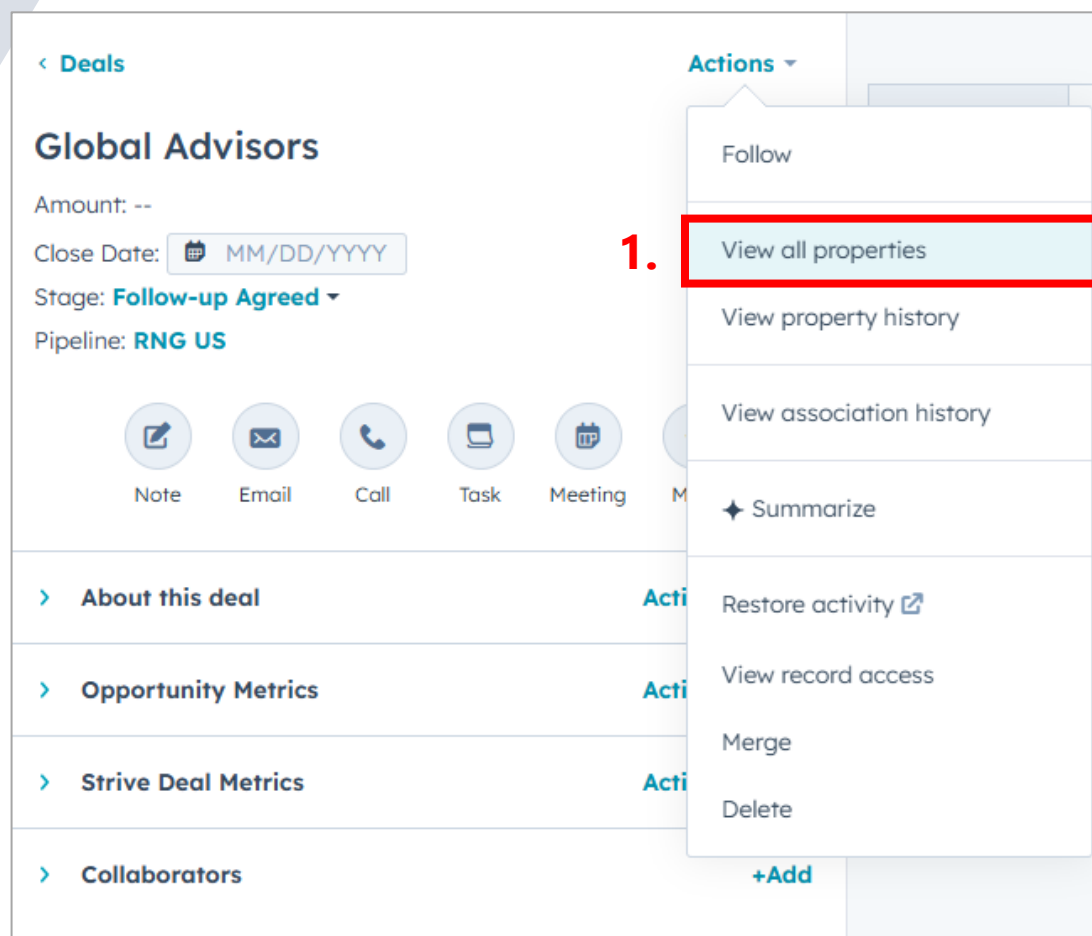
> Deals (0)

+ Add

> Attachments

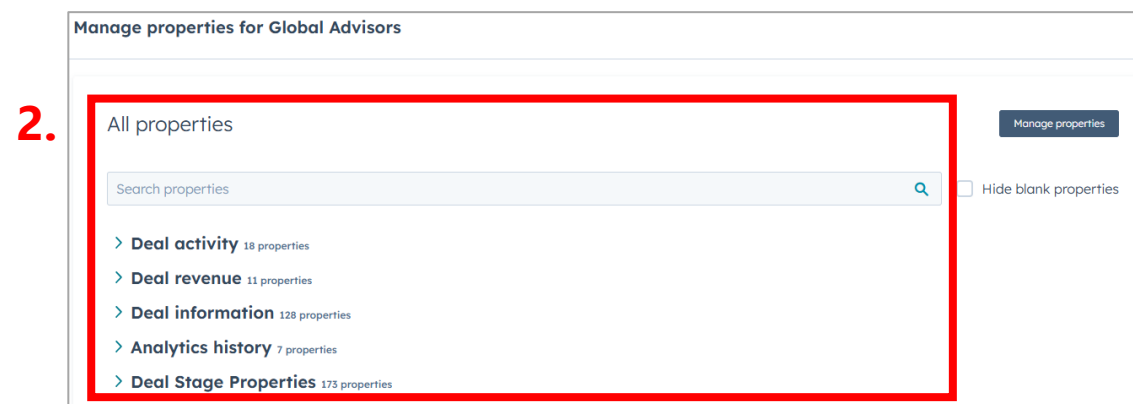
Add ▾

# Viewing all record properties (contact, company & deals)

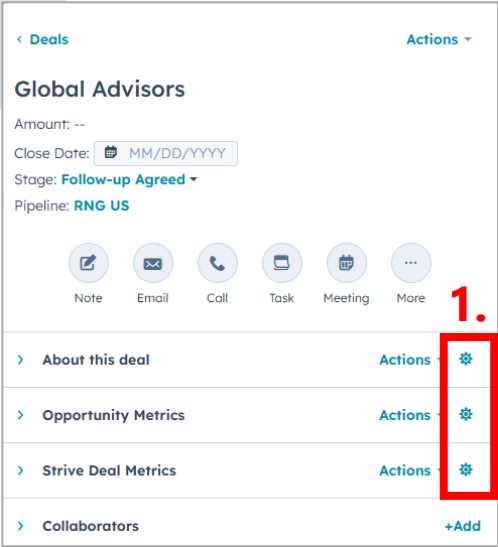


1. To view all record properties, click on actions > "View all properties".
2. Search for the relevant property by property category or using the search bar. You can edit properties directly from this view.

*Please note that deal properties are customized per pipeline, so some may appear relevant but remain unpopulated as they're used by other teams for different deal types.*

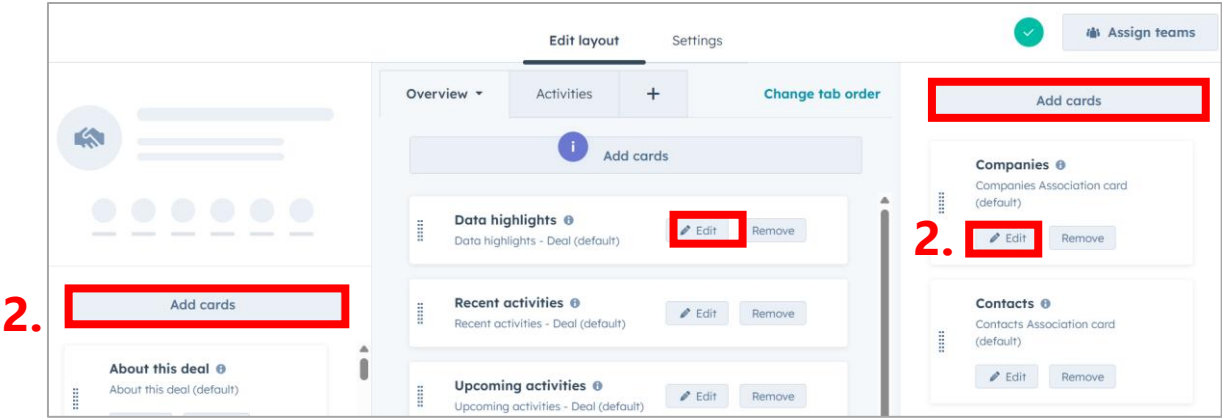
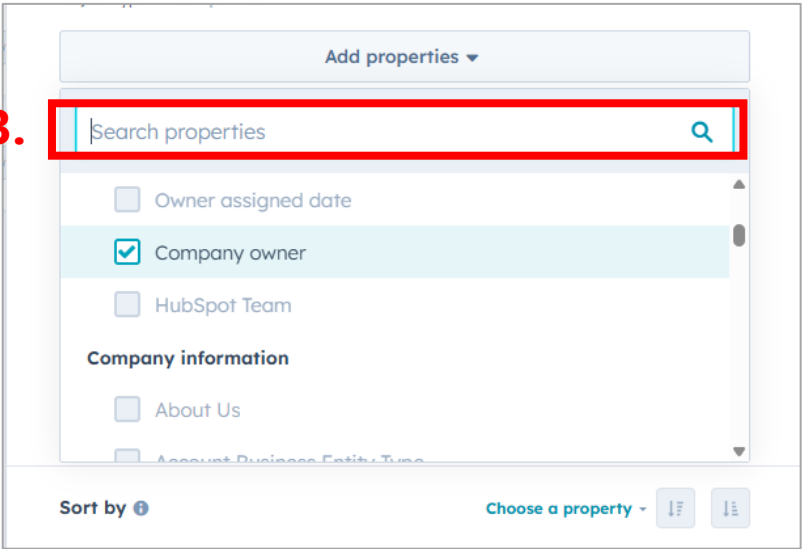
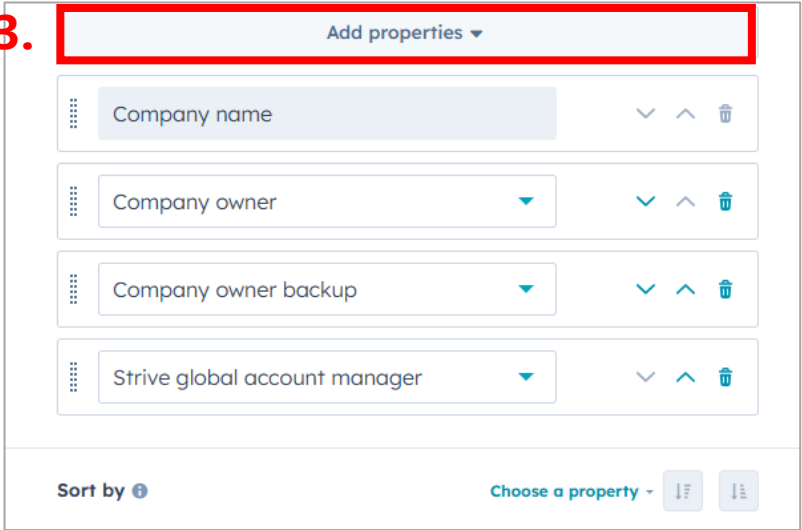


# Customizing record views (contact, company & deals)



- 1. All record views (contact, company and deals) are fully customizable by selecting the gear icon on the record you want to customize
- 2. You can add new “cards” with different properties or edit the properties or on existing cards
- 3. To add property, select edit > add property and add the property you want to see

Please bear in mind deal properties are tailored to different square’s pipeline.





# Data hygiene



# Data Hygiene – record history

< Companies

OCI Global

oci-global.com

0031207234500

Note

Email

Call

Task

Meeting

About this company

Company owner

Felix van den Horst

Description

OCI Global is a world leading producer and distributor of methanol, and hydrogen products. They are revolutionizing energy intensive industries that shape, feed, and fuel the driving forward the decarbonization of these industrie...

LinkedIn company page

https://www.linkedin.com/company/ociglobal

Actions

Follow

View all properties

View property history

View association history

Summarize

Search in Google

Restore activity

View record access

Merge

Delete

OCI Property history for OCI Global			
PROPERTY	CHANGED TO	MADE ON	SOURCE
Last modified date	03/26/2025 4:09 PM GMT+1	3/26/2025 at 4:09 PM GMT+1	HubSpot Processing
HubSpot team	Strive EMEA	3/26/2025 at 4:09 PM GMT+1	HubSpot Calculation
Last modified date	03/26/2025 4:05 PM GMT+1	3/26/2025 at 4:05 PM GMT+1	HubSpot Processing
HubSpot team	--	3/26/2025 at 4:05 PM GMT+1	HubSpot Calculation
Last modified date	03/26/2025 4:04 PM GMT+1	3/26/2025 at 4:04 PM GMT+1	HubSpot Processing
Last modified date	03/15/2025 8:44 AM GMT+1	3/15/2025 at 8:44 AM GMT+1	HubSpot Processing

# Data Hygiene – duplication?








## 1. UniqueID

US DataHive: >700,000  
MX DataHive: 500,000+  
NL DataHive: 0 < 100,000

## 2. Company\_UUID

Unique values indicate unique records in different or the same instance of DataHive  
No UUID – typically Marketing-sourced records  
UUID + No UniqueID = merged records in DataHive

✕

<input type="checkbox"/>	COMPANY NAME	NU...	COMPANY OWNER	COMPANY DOMAIN ...	A...	UNI...	COMPA...
<input type="checkbox"/>	 Akzo Nobel Chemicals S.A. (Nouryon)	1	No owner	--	No	12,030	D17564AC-...
<input type="checkbox"/>	 Nouryon	0	 Keegan Dean (keegan....	--	No	--	FD7C4430-...
<input type="checkbox"/>	 Nouryon	--	 Keegan Dean (keegan....	--	No	700,137	C7DBE44D-...
<input type="checkbox"/>	 Nouryon Chemicals LLC	4	 Nathan Buckler (natha...	<a href="http://www.nouryon.com">www.nouryon.com</a>	Yes	700,227	D080F584-...
<input type="checkbox"/>	 Nouryon Specialty Chemicals B.V.	5	 Felix van den Horst (feli...	<a href="http://www.nouryon.com">www.nouryon.com</a>	No	25,054	4EE81288-...



# Creating new records



# First check whether the records already exists or not

Companies ▼  
45,353 records





[See Target Accounts](#) [Data Quality](#) [Actions ▼](#) [Add data](#) [Create company](#)

All companies × My companies

[+ Add view \(2/50\)](#) [All Views](#)

Company owner ▼ Create date ▼ Last activity date ▼ Lead status ▼ [+ More](#) [Advanced filters](#)

[Export](#) [Edit columns](#)

<input type="checkbox"/>	COMPANY NAME	COMPANY OWNER	CREATE DATE (GMT+1)	PHONE NUMBER	LAST ACTIVITY DATE (GMT+1)	CITY
<input type="checkbox"/>	 --	No owner	Yesterday at 19:41 GMT+1	+1 254-761-6400	--	Deer
<input type="checkbox"/>	 fronteravp.com	No owner	21 Feb 2025 21:14 GMT+1	--	--	--
<input type="checkbox"/>	 Marriot Springhill Suit...	No owner	21 Feb 2025 20:22 GMT+1	+1 859-225-1500	--	Lexir
<input type="checkbox"/>	 North American Meat ...	No owner	21 Feb 2025 19:40 GMT+1	--	--	Wasl



# Make sure to first create the company before creating new contacts

First create the company

Contact demo

Company demo

Companies39,317 records

See Target AccountsData QualityActionsImportCreate company

All companiesMy companiesCompanies for Monthly Re...Net New LogosCompanies - source Zoom...Companies - source BCC\_...Companies - Marketing so...Companies to delete once ...Add view (8/50)All Views

Company ownerCreate dateLast activity dateLead statusMoreAdvanced filters

Search name, phone, or c

ExportEdit columns

	COMPANY NAME	NU...	COMPANY OWNER	COMPANY DOMAIN ...	A...	UNI...	COMPA...	RECORD SO...	RECORD SOURCE DETAIL 1	RECORD SOURCE DETAIL 2
	--	1	No owner	ganeshkrish.com	--	--	--	CRM Setting	"Create and associate comp...	--
	--	1	No owner	agetware.com	--	--	--	CRM Setting	"Create and associate comp...	--

Then the contact, since you always need to associated a contact with a company

Contacts82,000 records

Data QualityActionsImportCreate contact

All contactsAdd view (1/50)All Views

Contact ownerCreate dateLast activity dateLead statusMoreAdvanced filters

Search name, phone, em

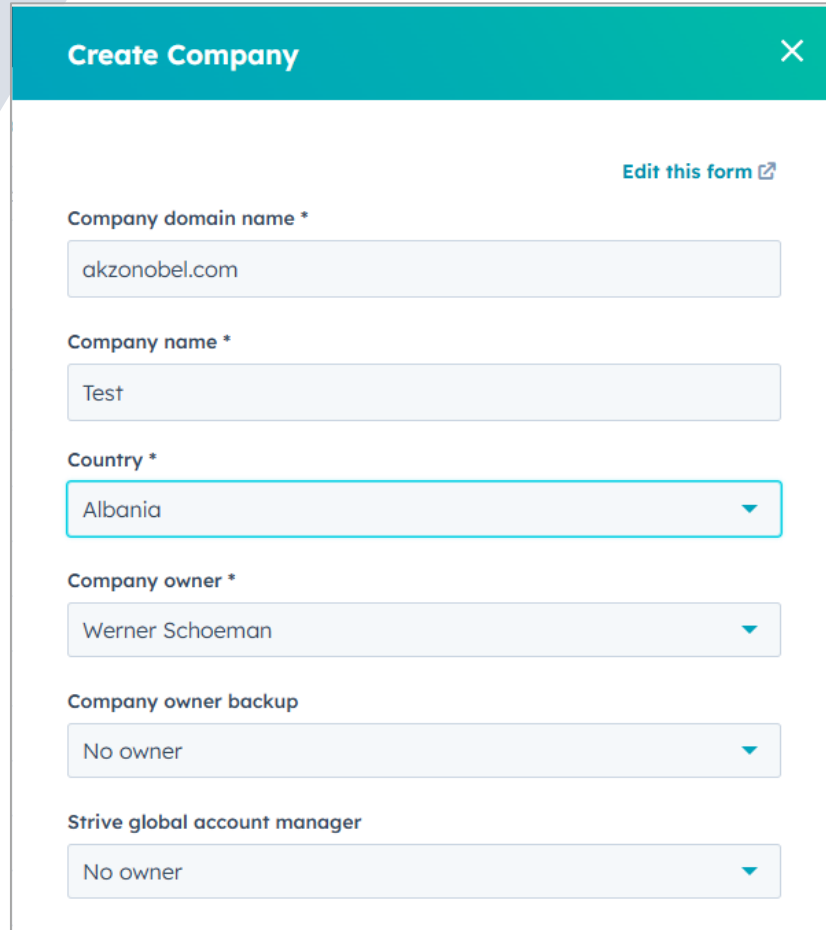
ExportEdit columns

	NAME	COMPANY NAME	CONTACT → COMPANIES	CONTACT OWNER	CONTACT OWNER BACKUP	CREATE DATE (GMT+1)	COUNTRY
	--	EG Retail (Belgium) BVBA	EG Retail (Belgium) BVBA	No owner	No owner	Jan 31, 2025 8:30 PM GMT+1	-
	--	Totsa Total Oil Trading	--	No owner	No owner	Jan 31, 2025 8:30 PM GMT+1	-

# Creating records through the Hubspot interface

Contact demo

Company demo



**Create Company** [Close]

[Edit this form](#)

Company domain name \*

akzonobel.com

Company name \*

Test

Country \*

Albania

Company owner \*

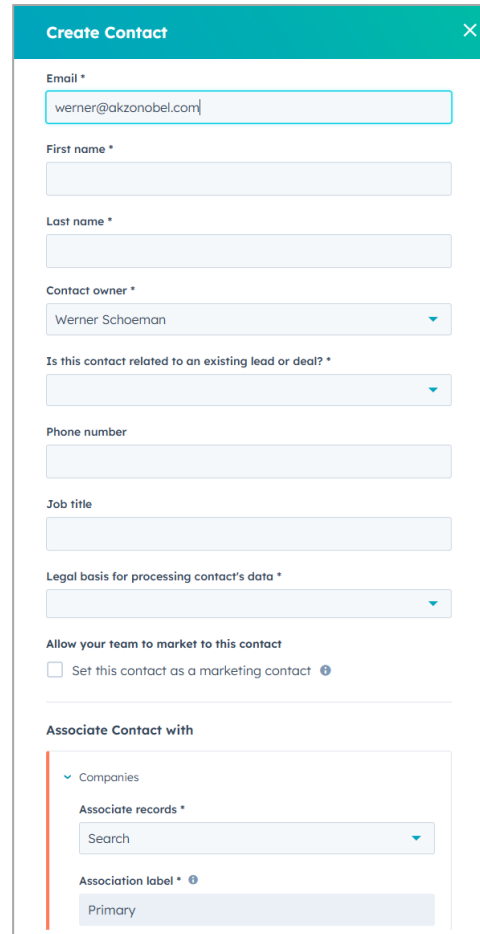
Werner Schoeman

Company owner backup

No owner

Strive global account manager

No owner



**Create Contact** [Close]

Email \*

werner@akzonobel.com

First name \*

Last name \*

Contact owner \*

Werner Schoeman

Is this contact related to an existing lead or deal? \*

Phone number

Job title

Legal basis for processing contact's data \*

Allow your team to market to this contact

☐ Set this contact as a marketing contact

Associate Contact with

Companies

Associate records \*

Search

Association label \*

Primary

We kept required fields to a minimum. The company domain name (website address) is required since that is used to match contacts to companies:

- stxgroup.com
- Werner.Schoeman@stxgroup.com

If you indicate that the contact is not related to an existing lead or deal, it will automatically create a lead object.

You are also required to indicate the legal basis for storing information. If the person is a lead or contact, this is sufficient.

**REMINDER:** Always create the company record first so you can associate the contact with the company.

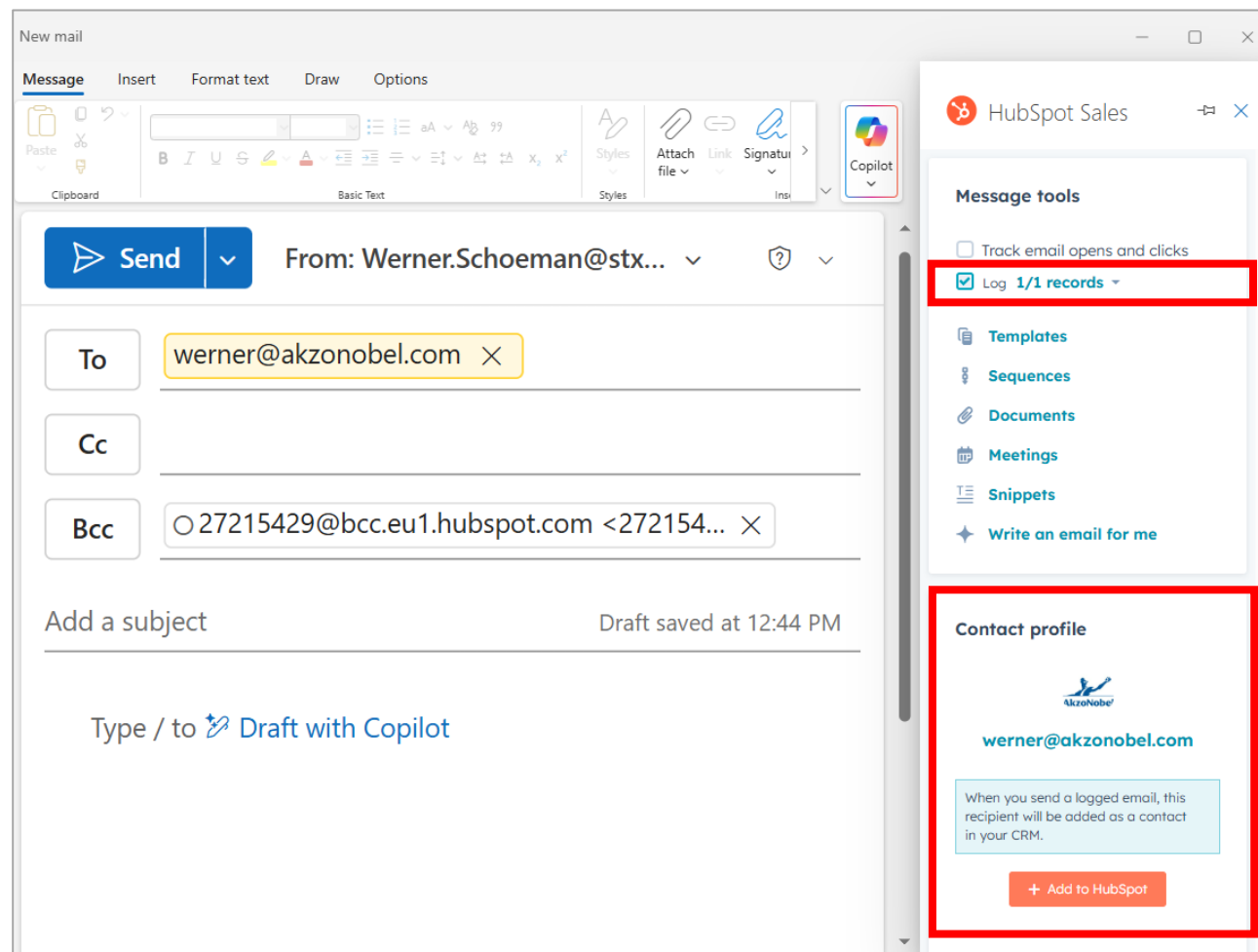
# Automated ways of creating new contacts

When you log emails through Outlook, it will automatically create the contact if it does not already exist, using the email address to match the contact to the right company

## Other automated ways of creating contacts

1. Business card scanner
2. Excel leads list imports (ask Marketing for help!)
3. From Marketing campaigns
4. LinkedIn Sales Navigator

**CAUTION:** With automated contact creation, the company will be created automatically if it does not exist in Hubspot or is unable to match the email domain to the company domain. This risks creating duplication.



# Account & contact mapping



Make sure the relevant records are correctly associated with the new record, such as related companies and contacts

Companies

Actions

Your permissions don't allow you to edit this record.

Marriott

Marriot Springhill Suites

marriot.com

+1 859-225-1500

Note

Email

Call

Task

Meeting

More

About this company

Actions

Company owner

No owner

Company owner backup

No owner

Strive global account manager

No owner

Description

--

LinkedIn company page

--

Commercial Status

Actions

Overview

Activities

Intelligence

Search activities

Q

Activity

Notes

Emails

Calls

Tasks

Meetings

Filter by:

Filter activity (12/21)

All users

All teams

February 2025

Record Enriched

1 property was updated: Company name.

Feb 21, 2025 at 8:22 PM GMT+1

This company was created

Feb 21, 2025 at 8:22 PM GMT+1

Customize record

»

Contacts (1)

+ Add

Robert Bahl

Marriot Springhill Suites

robert.bahl@marriot.com

Phone: --

Contact with Primary Company

View associated contacts

Deals (0)

+ Add

Track the revenue opportunities associated with this record.

Companies (0)

+ Add

See the businesses or organizations associated with this record.

Attachments

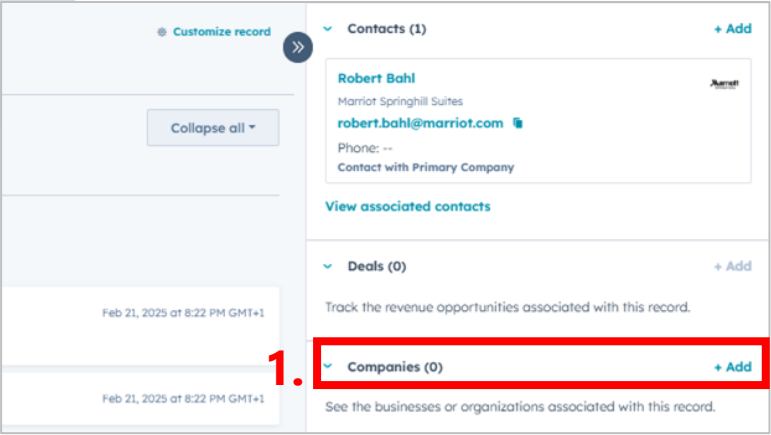
Add

See the files attached to your activities or uploaded to this record.



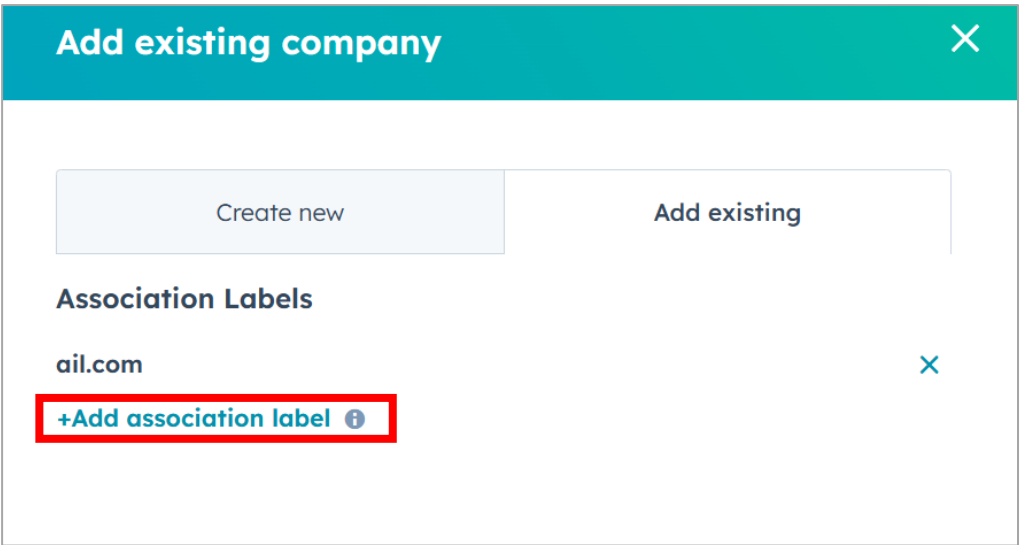
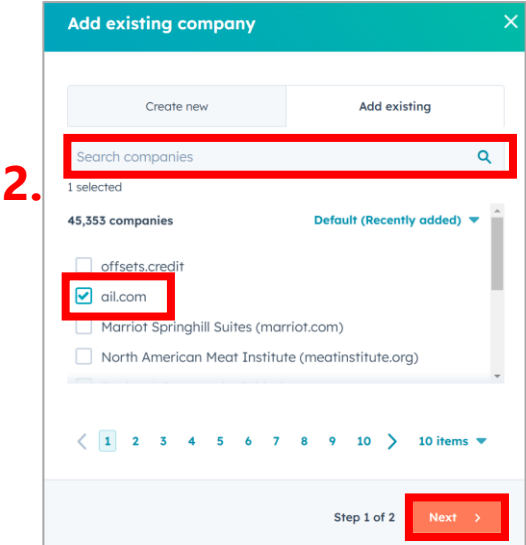
# Creating relationships between company records (parent > daughter > assets)

Read more



On the company record:

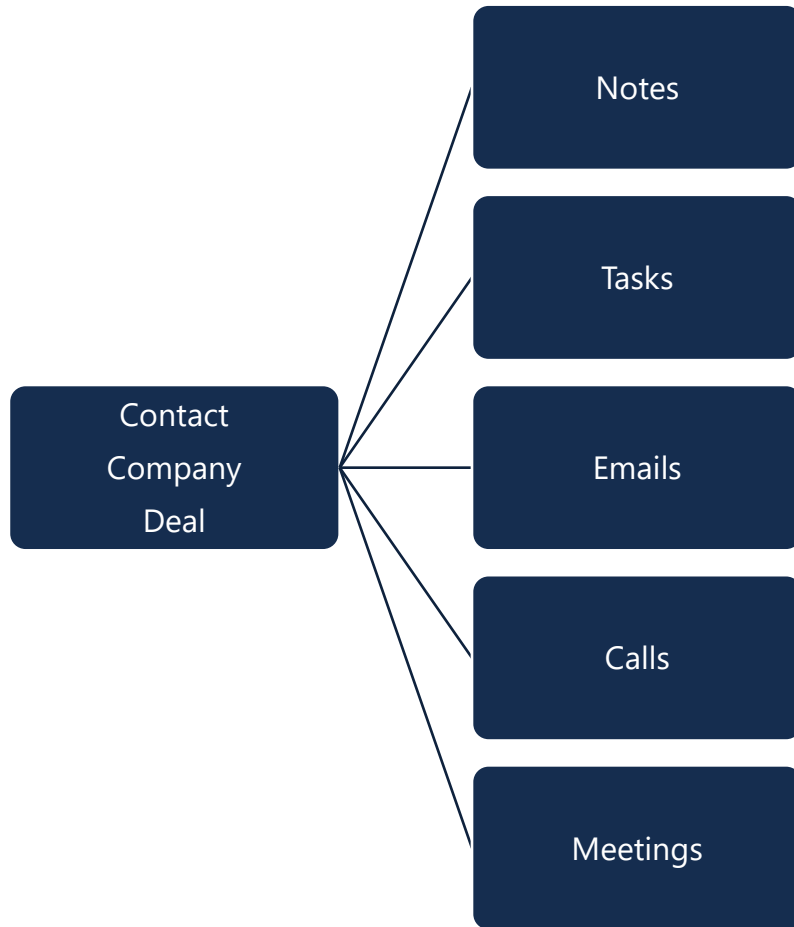
1. Select "+Add"
2. Search for the company and select "next"
3. Choose the correct association label:
  - **Parent:** overarching entity or group, e.g. Tesla or Unilever
  - **Child:** Regional legal entity, e.g. Tesla France or Dove (a sub-brand of Unilever)
  - **Asset:** The assets associated with an entity, such as different wind farms in the same country
4. Select "Save"



# Tracking Marketing & Sales Activities



# Marketing & Sales activity tracking and logging



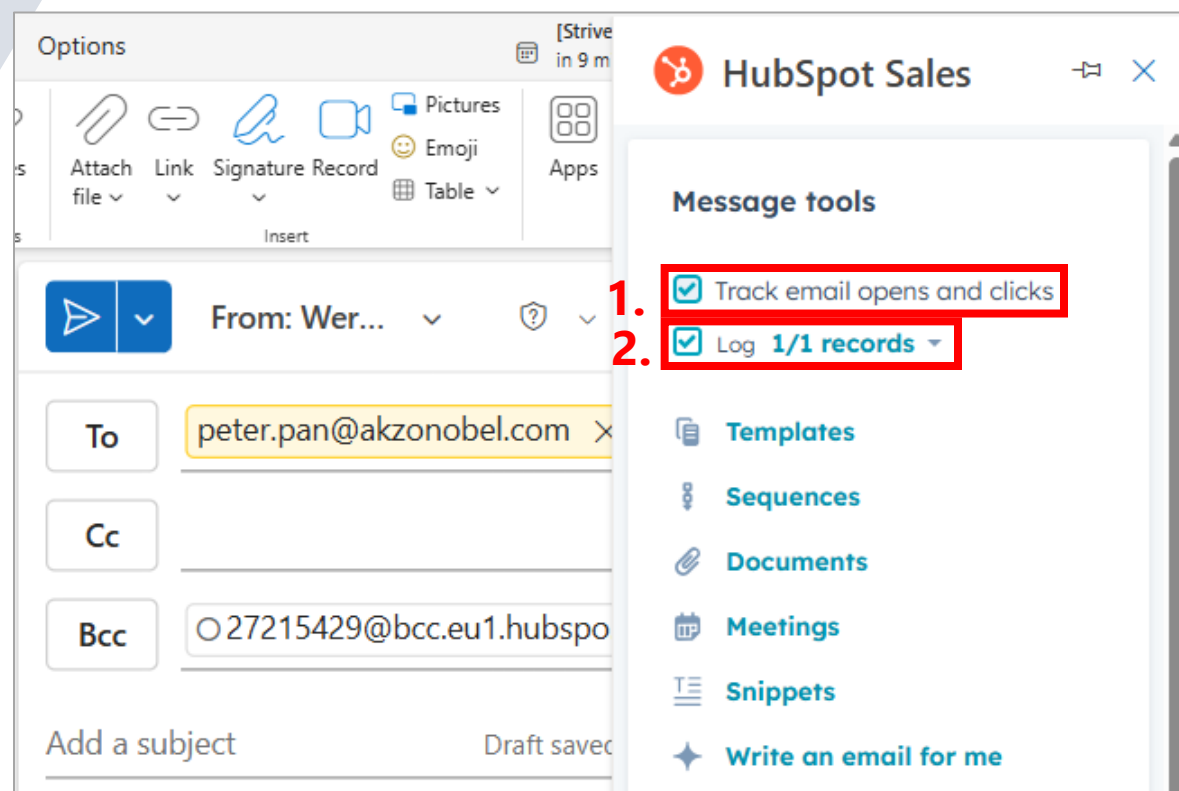
Activities consists of tracked actions in Hubspot:

- **Marketing activities:** Actions tracked by cookies from clients and prospects' engagement with our Marketing materials, such as website visits, newsletter subscriptions, webinar registrations etc.
- **Sales activities:** Sales engagement, such as notes, calls, meetings and emails tracked by Hubspot.

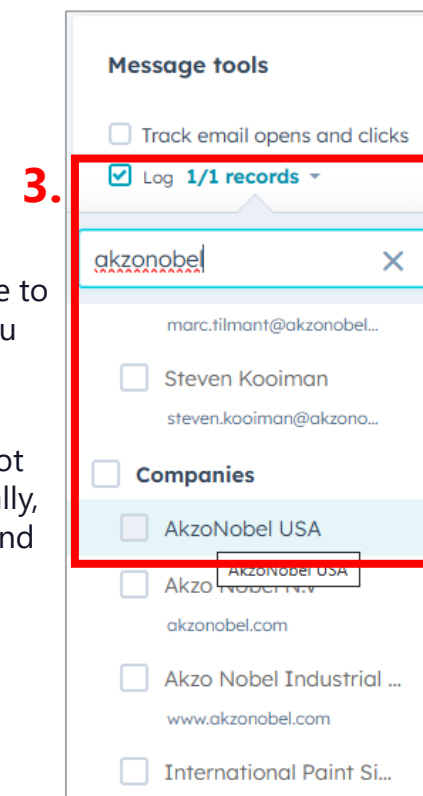
Marketing activities are tracked automatically. Sales activities are tracked under these conditions:

- Call tracking requires use of Zoom telephony
- Emails have to be logged when sent or sent through Hubspot
- Outlook has to be connected to Hubspot to track meetings

# Automatically track and log email with the Hubspot plugin



1. Track email opens and clicks
2. Log emails in Hubspot to make them visible to the rest of the team (be mindful of what you log!)
3. You can choose to log the email to related contact, company and deal records. Hubspot should identify relevant records automatically, but if you don't see them, you can search and add them manually.



# Automatically log meetings with the Hubspot meeting scheduler tool and calls (if you use Zoom telephony)

CHOOSE TIME

YOUR INFO

STX

Meet with Werner Schoeman

< March 2025 >

SUN	MON	TUE	WED	THU	FRI	SAT
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

Meeting duration

1 min

What time works best?

Showing times for March 31, 2025

UTC +02:00 (Europe) Central European Time

3:45 pm

3:46 pm

3:47 pm

3:48 pm

3:49 pm

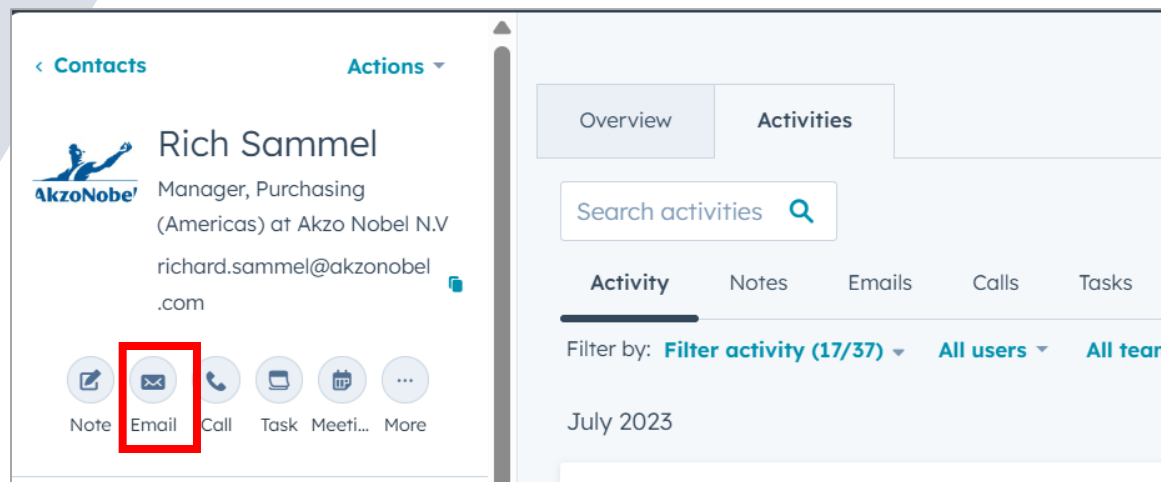
3:50 pm

3:51 pm





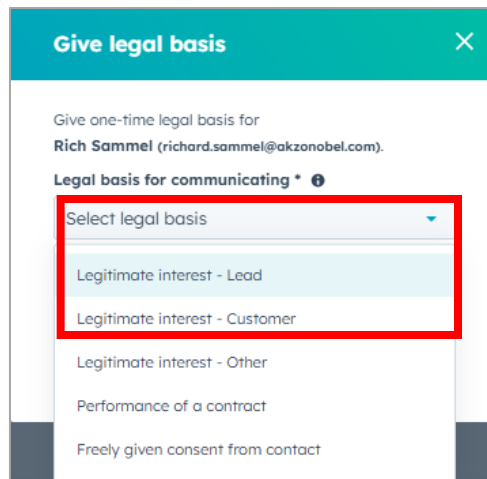
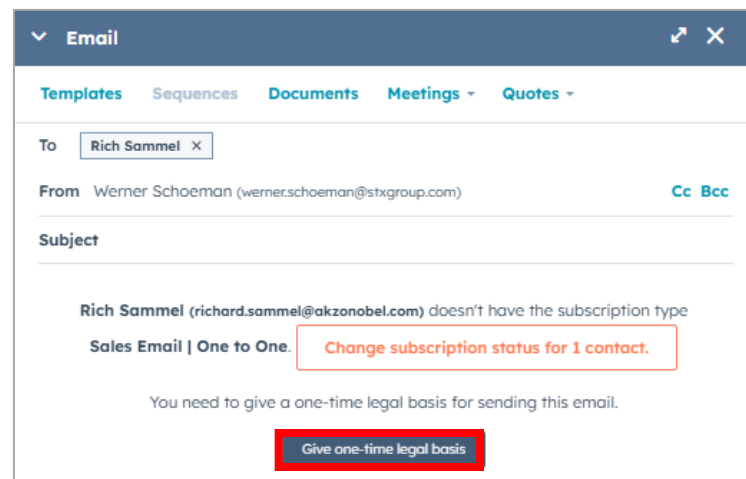
# Emails and meetings executed through Hubspot will also be tracked



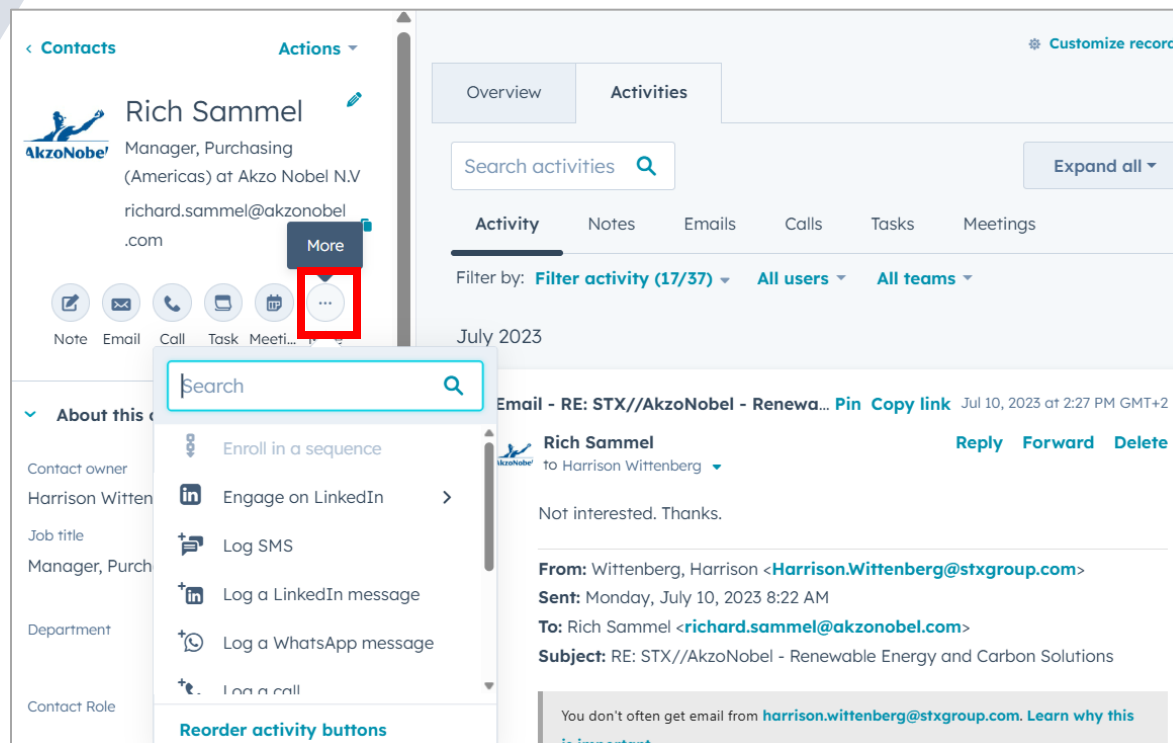
To email a contact, navigate to the envelope icon on the top left of the contact record.

The first time you email someone through Hubspot, you need to specify the bases for consent, which is either:

- Legitimate interest – Lead
- Legitimate interest – Customer



# It is also possible to manually create or log activities



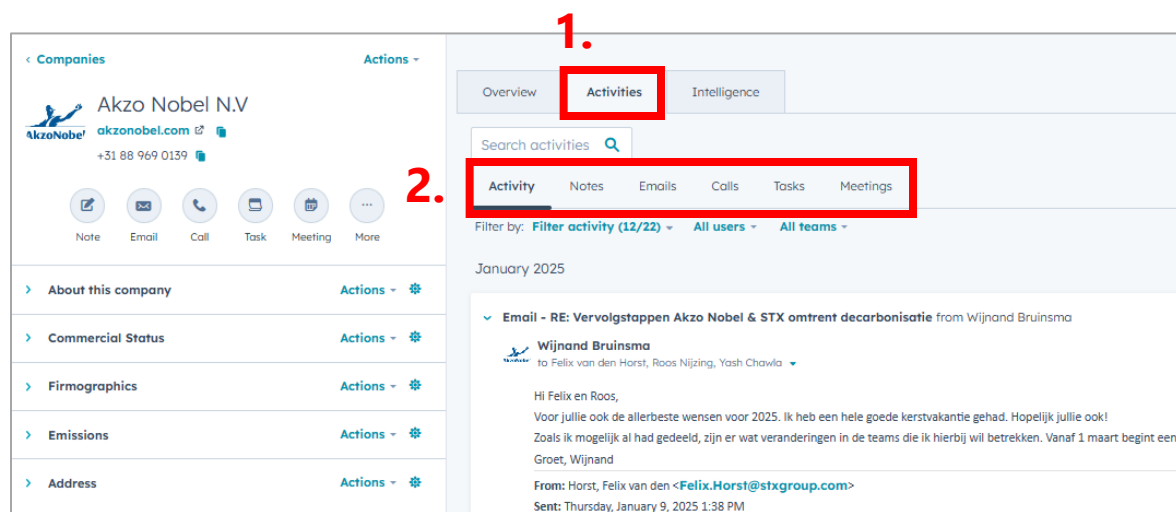
Activities can be created or logged for contact, company and deal records:

- Create a note
- Email
- Create a task
- Etc.

To log an activity that already took place, simply click “More” on the top left of the contact record and select the type of activity you want to log.

[Read more](#)

# The most common sales activities have a dedicated section on contact and company records



Navigate to the “activities” tab in the center of the contact, company or deal record

Select the type of activity to view past activities or create new ones

Colleagues can be tagged in notes and they can be pinned to the top

## Productivity tools: Tasks



# Where to create new tasks

Tasks represent your "to do" or reminders you set yourself to complete a task, follow-up, call, update etc.:

1. Creating new tasks from company, contact and deal records (see slide XX)

The screenshot shows a CRM interface for a deal record titled "Global Advisors". The left sidebar contains navigation options like "Amount: --", "Close Date: MM/DD/YYYY", "Stage: Follow-up Agreed", and "Pipeline: RNG US". The main area has tabs for "Overview", "Activities", and "Tasks" (highlighted with a red box). Below the "Tasks" tab, there's a "Search activities" bar and a list of upcoming tasks, including "Task assigned to Alex Agrons" and "Follow up with Chris Negus". On the right, there's a "Companies (1)" section showing "White Oak Global Advisors, LLC" and a "Create Task" button (highlighted with a red box).

2. Creating a new task from the sales workspace (sales users only)

The screenshot shows a CRM interface for a sales workspace titled "Sales | Werner Schoeman". The top navigation bar includes "Summary", "Prospecting" (highlighted with a red box), "Deals", "Schedule", and "Feed". The main area displays "Open leads" with a table of leads. The table has columns for "Lead stage", "Lead Label", "Company", "Lead Type", "Advanced filters (2)", "Clear all", "Last Activity (GMT+2)", "Next Activity (GMT+2)", and "Lead Engagement (GMT+2)". The table contains two rows of leads: "Cian Boland 2025-03" and "Jill Abelson". The "Schedule" button in the "Next Activity" column for "Jill Abelson" is highlighted with a red box.



# Creating new tasks from company, contact and deal records

The screenshot shows a 'Task' creation modal with a dark blue header containing a dropdown arrow and a close button. The main area is white and contains the following elements:

- Enter your task**: A text input field with a placeholder 'Please fill out this field.'
- Activity date**: A dropdown menu showing 'In 3 business days (Friday)'.
- Send reminder**: A dropdown menu showing '1 hour before'.
- Set to repeat**: A checkbox that is currently unchecked.
- Task ...**: A dropdown menu showing 'To-do'.
- Priority**: A dropdown menu showing 'None'.
- Queue**: A dropdown menu showing 'None'.
- Activity assigned to**: A dropdown menu showing 'Werner Schoeman'.
- Notes...**: A text area for adding notes.
- Formatting and Icons**: A row of icons for bold (B), italic (I), underline (U), strikethrough (T), and a 'More' dropdown, followed by icons for link, image, and list.
- Associated with 1 record**: A link to view the associated record.
- Create**: A button at the bottom left to save the task.

After selecting “Create task” on the corresponding record, the following screen will appear where you can:

1. Set the due date,
2. Set a reminder,
3. Choose the type of task: To-do, call, email, connect / message via LinkedIn,
4. Priority, etc.

It's also possible to create and assign tasks for another team member.

# Creating a new task from the sales workspace

(Sales users only)

- 1. Directly select the type of task from the drop-down
- 2. Add the details in the pop-up

Open leads

Lead stageLead LabelCompanyLead TypeAdvanced filters (2)Clear all

Search leads

LEAD	LEAD LABEL	COMPANY	STAGE	LAST ACTIVITY (GMT+2)	NEXT ACTIVITY (GMT+2)	LEAD ENGAGEMENT (GMT+2)
<input type="checkbox"/> Cian Boland 2025-03	Hot	Periti Digital	Meeting Scheduled for 8 days	Send another Was due 7 days ago	Follow up with Cian Boland Due in 2 days	Booked meeting 11 days ago
<input type="checkbox"/> Jill Abelson Created by you	Warm	Kamila	Prospect Identified for 20 days	Email Jill Abelson Was due 5 days ago	Follow up with Jill Abelson Due on hour ago	
<input type="checkbox"/> Test contact record 2 Created by you	Cold	test-with-contacts	Meeting Scheduled for a month	Call Peter Pan Was due 9 days ago	Schedule	
<input type="checkbox"/> Test contact record 1 Created by you	Hot	test-with-contacts	Connected for a month	Call Test contact record Was due 12 days ago	Create task Today	

2. Task details

Task Title  
Call Peter Pan

Task Type  
Call

Priority  
None

Associate with records  
Associated with 2 records

Peter PanTest contact record 2

Assigned to  
Werner Schoeman

Queue  
None

Due date  
Today 12:30 PM

☐ Set to repeat

Reminder  
No reminder

Notes

SaveCancelDelete

Access your list of tasks from the 1) sales workspace (sales users only) or the dedicated 2) Task dashboard

1.

Sales

Werner Schoeman

Summary

Prospecting

Deals

Schedule

Your tasks

Overdue

HIGH PRIORITY

3

ALL TASKS

27

To-dos (12)

Calls (7)

Emails (8)

LinkedIn (0)

2.

Workspaces

CRM

Marketing

Content

Commerce

Automations

Reporting

Data Management

Library

Breeze

All

Contacts

Companies

Deals

Tickets

Trades

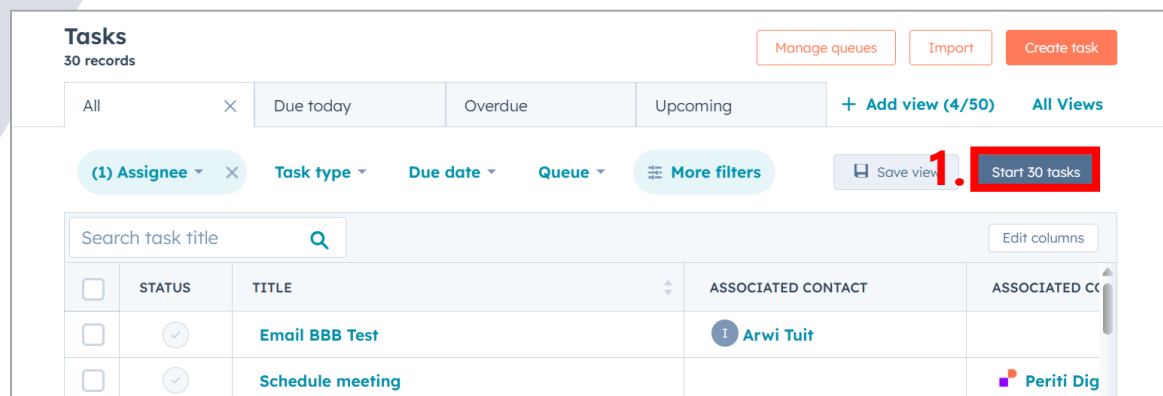
Lists

Inbox

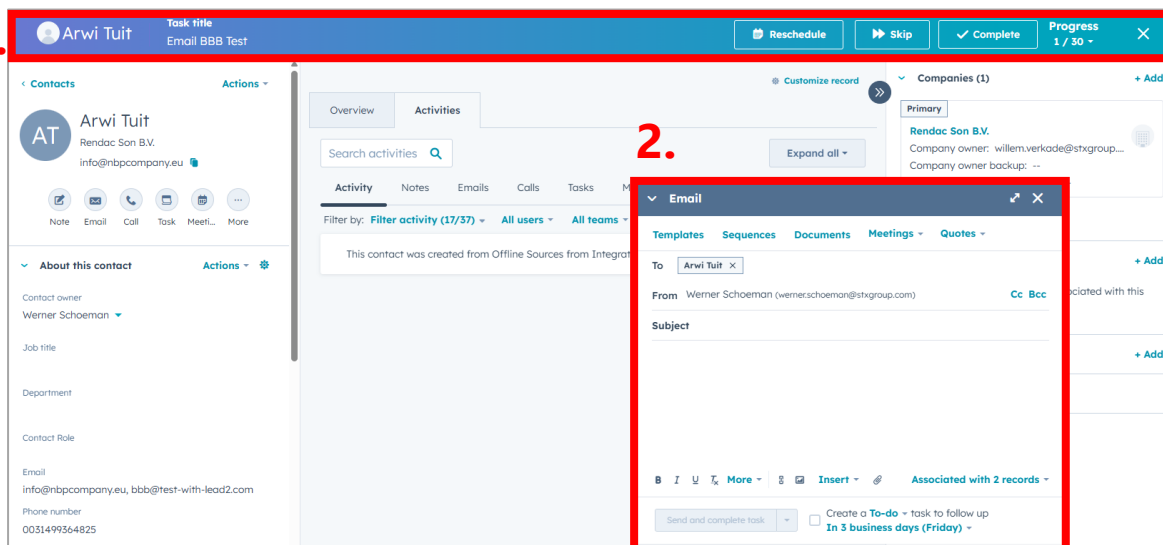
Calls

Tasks

# The Task dashboard is your productivity tool to systematically work through your to do's



1. Select start tasks to begin working through your set of tasks
2. The tool will systematically take you through all your tasks, opening the relevant record and corresponding action.
3. For example, when handling email tasks, it will automatically open the contact's record with the email tool ready to use.



# Pipelines: Leads





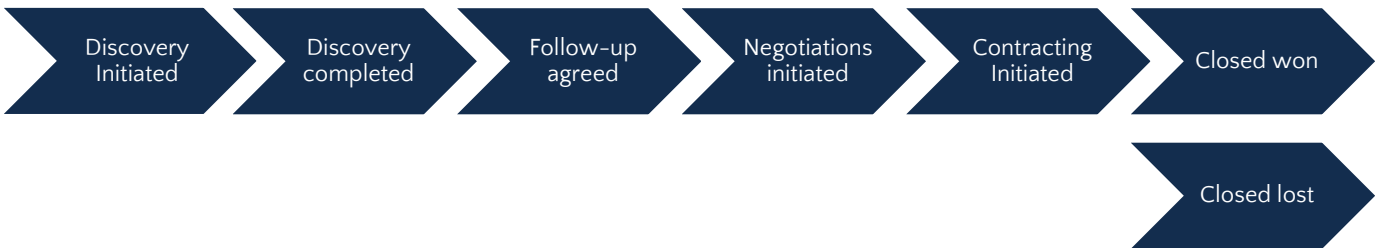
# We track commercial interest in Hubspot with two objects

## LEADS



- When to use**
  - Cold outreach
  - Outreach to a lot of companies
- When NOT to use:**
  - Recurring business
  - Where there is an established relationship
- Limitations**
  - Requires sales license to view and edit
  - You can only delete your own deals

## DEALS (OPPORTUNITIES)



- When to use**
  - Onboarding of new CPs
  - Complex and longer-term deals with existing CPs
- When NOT to use**
  - Creating a deal is not needed for short-term trades or transactional sales
- Limitations**
  - You can only view and edit your team’s deals or deals in other pipelines where you were added as a “Collaborator”
  - You can only delete your own deals

# What are leads?

(Sales licenses only)

Manage leads

Sales workspace

- Leads represent individuals that we want to connect with at a company.
- It is a dimension of contact records. Any information on the contact will transfer automatically to the lead, e.g. lead owner will be the same as contact owner.
- Leads are tracked automatically through 5 stages:
  - **Prospect identified:** You identified the right person at a company you want to reach out to.
  - **Outreach sent:** You have sent an email, called, or tried to connect via LinkedIn Inmail.
  - **Connected:** The person responded or the call went through.
  - **Meeting schedule:** You have scheduled a meeting with the person.
  - **Qualified / disqualified:** The lead is either converted into a deal when qualified or disqualified after the initial meeting.
- Leads are created manually with the default stage being prospect identified. From that stage up until the qualification or disqualification, the lead stages are tracked automatically by Hubspot as long as your emails are logged and your Outlook calendar is connected to Hubspot.
- After your meeting, a task will automatically be created for you to qualify or disqualify the lead.

# Creating leads

(Sales licenses only)

Manage leads

Sales workspace

- Creating leads is manual, because not all contact records are leads and you need to use your discretion for when a contact is a lead. Click [here](#) for automated ways of creating contacts to make this process seamless.
- To create new leads, simply navigate to the contact record and select "+ Add".

> Companies (1) + Add

⋮ > Leads (0) + Add

Track the prospecting activities associated with this record.

> Deals (0) + Add

> Sales Navigator

> Org Chart (1)

Create Lead

Create new Add existing

Edit this form

Lead Name \*

Patricia Davis

Lead Pipeline

Select a pipeline

Lead stage

Prospect Identified (Lead pipeline)

Lead Type \*

New Business

Lead Label

Warm

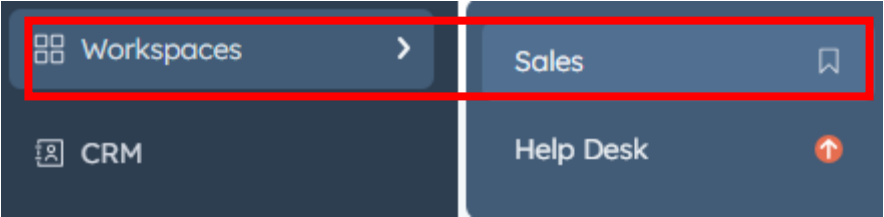
# Navigating to the prospecting dashboard

(Sales licenses only)

To view and manage your leads, navigate to the prospecting tab of your sales dashboard

Manage leads

Sales workspace



Sales | Werner Schoeman

Summary

Prospecting

Deals

Schedule

Feed

Leads

Target accounts

Leads

Open leads

Target accounts

Recent activity

Not in sequence

All leads

Open leads

Lead stage

Lead Label

Company

Lead Type

Advanced filters (2)

Clear all

Search leads

	LEAD	LEAD LABEL	COMPANY	STAGE	LAST ACTIVITY (GMT+1)	NEXT ACTIVITY (GMT+1)	LEAD ENGAGEMENT (GMT+1)
<input type="checkbox"/>	Cian Boland 2025-03	Hot	Periti Digital	Meeting Scheduled for 4 days	Send another Was due 3 days ago	Follow up with Cian Boland Due in 6 days	Booked meeting 7 days ago
<input type="checkbox"/>	Jill Abelson Created by you	Warm	Kamilo	Prospect Identified for 16 days	Email Jill Abelson Was due 21 hours ago	Schedule	--
<input type="checkbox"/>	Test contact record 2 Created by you	Cold	test-with-contacts	Meeting Scheduled for 22 days	Call Peter Pan Was due 21 hours ago	Schedule	--
<input type="checkbox"/>	Test contact record 1 Created by you	Hot	test-with-contacts	Connected for 22 days	Call Test contact record 1 Was due 8 days ago	Schedule	--

# Managing leads

(Sales licenses only)

Manage leads

Sales workspace

- 1. Filter on different dimensions, such as lead stage, priority level etc.
- 2. Get a quick overview most recent activities and plan follow-up activities directly from the dashboard

Sales | Werner Schoeman

SummaryProspectingDealsScheduleFeed

Leads

Target accounts

Leads

Open leads4

Target accounts0

Recent activity0

Not in sequence4

All leads6

Open leads

Lead stageLead LabelCompanyLead TypeAdvanced filters (2)Clear all

Search leads

	LEAD	LEAD LABEL	COMPANY	STAGE	LAST ACTIVITY (GMT+1)	NEXT ACTIVITY (GMT+1)	LEAD ENGAGEMENT (GMT+1)
<input type="checkbox"/>	Cian Boland 2025-03	Hot	Periti Digital	Meeting Scheduled for 4 days	Send another Was due 3 days ago	Follow up with Cian Boland Due in 6 days	Booked meeting 7 days ago
<input type="checkbox"/>	Jill Abelson Created by you	Warm	Kamilo	Prospect Identified for 16 days	Email Jill Abelson Was due 21 hours ago	Schedule	--
<input type="checkbox"/>	Test contact record 2 Created by you	Cold	test-with-contacts	Meeting Scheduled for 22 days	Call Peter Pan Was due 21 hours ago	Schedule	--
<input type="checkbox"/>	Test contact record 1 Created by you	Hot	test-with-contacts	Connected for 22 days	Call Test contact record 1 Was due 8 days ago	Schedule	--



# Lead stages are tracked automatically and qualified leads are converted into leads

Click [here](#) for the lead stages and tracking.

These stages can be skipped if an activity was not tracked. For example, a lead can move from "outreach sent" to "meeting scheduled" if it did not register an email response from the lead.

After the meeting with a prospect, a task will automatically be created to qualify or disqualify the lead.

- For disqualified leads, you will be asked to give a reason for analytic purposes
- Qualified a lead will prompt you to create a deal.

The screenshot displays a CRM interface with a sidebar on the left and a main content area. The sidebar includes sections for 'Companies (1)', 'Leads (1)', 'Deals (0)', 'Sales Navigator', and 'Org Chart (1)'. The main content area shows the details for a lead named 'test-with-contacts'. It includes fields for 'Company owner', 'Company owner backup', and 'Strive global account manager', all with '--' values. Below these is a 'View associated Company' link. The 'Leads (1)' section shows a lead named 'Test contact record 2' with owner 'Werner Schoeman', lead type 'New Business', and stage 'Meeting Sche...'. A 'Meeting Scheduled' notification bubble is present. At the bottom, there is a progress bar with four segments, the first three of which are marked with checkmarks.

# Pipelines: Deals



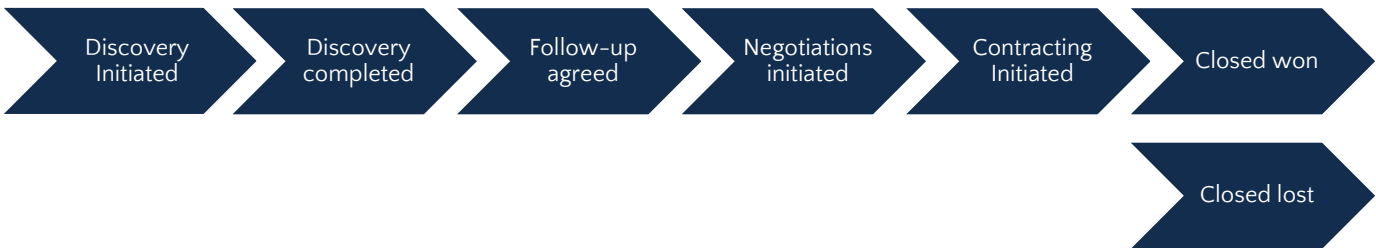
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## LEADS



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  - Where there is an established relationship
- Limitations**
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## DEALS (OPPORTUNITIES)



- When to use**
- Onboarding of new CPs
  - Complex and longer-term deals with existing CPs
- When NOT to use**
- Creating a deal is not needed for short-term trades or transactional sales
- Limitations**
- You can only view and edit your team’s deals or deals in other pipelines where you were added as a “Collaborator”
  - You can only delete your own deals

# What are deals?

Manage leads

## All deals

- Deals in HubSpot tracks longer or more complex **sales opportunities** with a sales lifecycle of one or more months.
- Shorter trades, transactional trades do not require a deal object.
- You can create a deal:
  - When a **lead is qualified**, or
  - **Directly in the pipeline**, for existing relationships or recurring business (when you did not use a lead object).
- A single counterparty can have **multiple deals**.
- Create a **separate deal for each product**, as each follows its own process and timeline.
- Each square has its **own pipeline**.

Deals are **only visible** to:

- The Deal Owner,
- Members of the Deal Owner's team,
- Strive Owner,
- Collaborators (e.g., Ops or other squares users added to the deal).

## Strive collaboration

Strive:

- Has its own pipeline for deals they fully own.
- Can create **new deals in other pipelines** when it is a collaboration with another square.

When a "Strive Owner" is added to a deal in another pipeline:

- The **deal becomes** visible to the Strive owner,
- **A clone is created** of the original deal in the Strive pipeline and the two deals become linked.

# The standard deal stages for all pipelines

- Deal stages are harmonized across pipelines, but the (required) fields you need to complete are tailored to the needs of the different squares. That is why it is very important to create RNG deals in the RNG pipeline and biofuel deals in the biofuel pipeline.
- Deal stages follow sales best practices:
  - Each stage is mutually exclusive (e.g., "KYC approval" is not a stage),
  - Each stage is phrased as a past tense verb, making it clear when to progress the deal to the next stage.
- Only the "Follow-up agreed" deal stage can be skipped.

Pipeline stage	Definition
Discovery initiated	Following at least one meeting or call, a commercial opportunity has been identified, but the parameters of the deal may not yet be clear.
Discovery completed	Following several meetings, it is clear what the CPs needs and what the parameters of the deal could look like.
Follow-up agreed	This stage can be skipped. If the timing of the deal is off, you can park it here which will create a task to set a reminder for yourself to follow up.
Negotiations initiated	We entered into negotiations on the terms of the deal with the CP.
Contracting initiated	Negotiations have moved to the contracting phase.
Closed won	We won the deal.
Closed lost	We lost the deal.



# How to see your team's deals

Deals

123 records

View your Deals as a list

1.

2.

US Certificates

Strive

Deal owner

Create date

Last activity date

Close date

+ More

Advanced filters

TOTAL DEAL AMOUNT

€1.3M

Average per deal: €259.57K

WEIGHTED DEAL AMOUNT

€756.77K

Average per deal: €151.35K

Search name or description

DEAL NAME

ACCOUNT TYPE

COUNTERPARTY TYPE (US ...)

DEAL STAGE

NW Natural - Bid for Open ...

Corporate

--

Discovery Initiated

3 Degrees - 25000 BTC

Closed Lost/DN

Deals

View your Deals on board

US Certificates

Strive

+ Add view (3/50)

Deal owner

Create date

Last activity date

Close date

+ More

Advanced filters

TOTAL DEAL AMOUNT

€1.3M

Average per deal: €259.57K

WEIGHTED DEAL AMOUNT

€756.77K

Average per deal: €151.35K

OPEN DEAL AMOUNT

€535.71K

Average per deal: €178.57K

Search name or description

DISCOVERY INITIATED

DISCOVERY COMPLETED

FOLLOW-UP AGREED

NEGOTIATIONS INITIATED

CONTRACTING INITIATED

CLOSED WON

NW Natural - Bid for Open LCA RNG

Feedstock: Any

Prod. Start Date: 07/01/2025

No activity for 6 days

1 No activity scheduled

Nutrien

Global Advisors

Feedstock: Food Waste

Task 3 days ago

1 No activity scheduled

Colgren

Feedstock: Dairy

Note 25 days ago

ART RFP

Amount: \$0

Prod. Start Date: 06/02/2025

No activity for 6 days

1 No activity scheduled

Montauk Supply April to June

Amount: \$0

Feedstock: Landfill

Prod. Start Date: 04/01/2025

L'Oreal USA Inc - 2025 RTC Deal

Amount: \$600,000

Close date: 03/28/2025

Note 15 days ago

1 No activity scheduled

L'Oreal USA Inc - 2025 REC deal

Amount: \$226,410

Close date: 03/21/2025

Duke Energy

Close date: 03/06/2025

Feedstock: Landfill

Navigate to CRM > Deals

1. Make sure your team's pipeline is selected, e.g. RNG US
2. Select to view your deals as a list or board

We have already created tailored list views for all the squares (click [here](#) to see how to add it)

3. Deals are either in USD or EUR, but the pipeline "insights" are in the company currency. You can hide these insights if you find them distracting.

Deals

All deals

US Certificates

Strive

+ Add view (3/50)

Actions

Import

Create deal

3.

Hide Insights

Advanced filters

TOTAL DEAL AMOUNT

€1.3M

Average per deal: €259.57K

WEIGHTED DEAL AMOUNT

€756.77K

Average per deal: €151.35K

OPEN DEAL AMOUNT

€535.71K

Average per deal: €178.57K

CLOSED DEAL AMOUNT

€226.41K

Average per deal: €226.41K

NEW DEAL AMOUNT

€0

AVERAGE DEAL AGE

14 days

Search name or description

DISCOVERY INITIATED

DISCOVERY COMPLETED

FOLLOW-UP AGREED

NEGOTIATIONS INITIATED

CONTRACTING INITIATED

CLOSED WON

NW Natural - Bid for Open LCA RNG

Feedstock: Any

Prod. Start Date: 07/01/2025

No activity for 6 days

1 No activity scheduled

Nutrien

Global Advisors

Feedstock: Food Waste

Task 3 days ago

1 No activity scheduled

Colgren

Feedstock: Dairy

Note 25 days ago

1 No activity scheduled

ART RFP

Amount: \$0

Prod. Start Date: 06/02/2025

No activity for 6 days

1 No activity scheduled

Montauk Supply April to June

Amount: \$0

Feedstock: Landfill

Prod. Start Date: 04/01/2025

L'Oreal USA Inc - 2025 RTC Deal

Amount: \$600,000

Close date: 03/28/2025

Note 13 days ago

1 No activity scheduled

L'Oreal USA Inc - 2025 REC deal

Amount: \$226,410

Close date: 03/21/2025

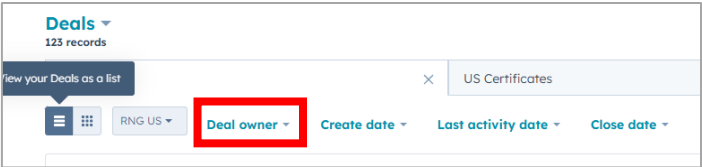
Duke Energy

Close date: 03/06/2025

Feedstock: Landfill

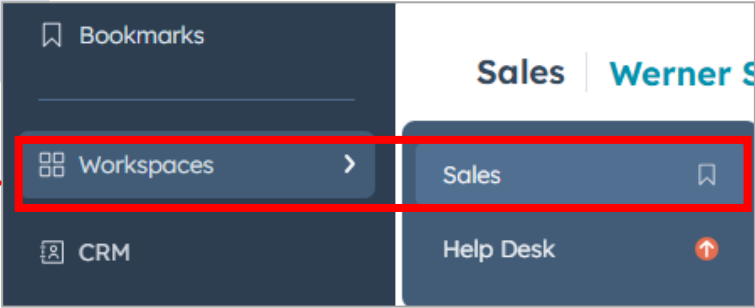
# How do you see an overview of *your* deals

1.



1. You can easily filter on your deals in the pipeline overview.
2. While the pipelines view shows an overview of *your team's* deals, the sales prospecting workspace enables you to see an overview of all *your* deals, regardless of the pipeline (*please note that the sales prospecting space requires a sales license!*)
3. From this view, you can see high-level analytics of all your deals, including ones in different pipelines (which is often the case for Strive).
4. From this view you can easily see the last activity for all your deals as well as planning follow up activities.

2.



3.

3.

Deals

Presets views

Open Deals 0

Stalled Deals 0

Recent Activity 0

No Activity Scheduled 0

Stale Close Date 0

All Deals 0

Closed Won 0

Closed Lost 0

Saved views

All deals 426

US Certificates 30

Strive 426

2.

Strive

€10,763,908 (Avg €290,916 per deal)

Strive & BD US

Create date

Last activity date

Close date

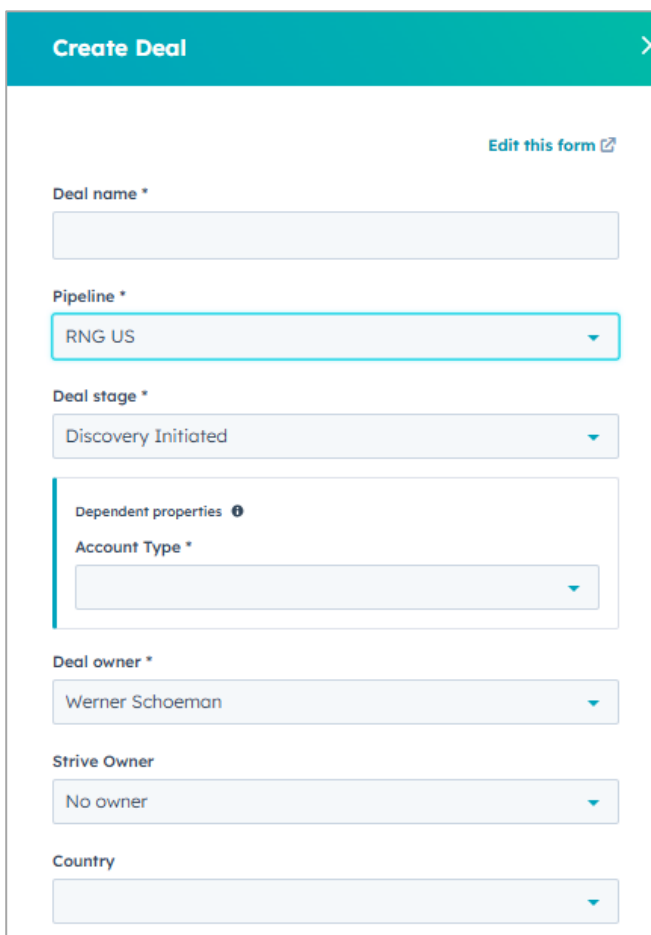
Advanced filters (1)

Clear all

Search deals

DEAL NAME	STX PRICE COMMENT	ACCOUNT TYPE	DEAL STAGE	DEAL OWNER	STRIVE OWNER	TRADE TYPE	AMOUNT	DEAL PROBABILITY	PRODUCT INTEREST
Kaiser Permanente	--	--	Discovery Initiated 13 hours	Nathan Buckler (nathan.buckle...)	Nathan Buckler (nathan.buckle...)	--	--	1%	PPA/VPPA, Carbon Offset
EMCOR Group, Inc. - 2024 RECs	--	Corporate	Discovery Initiated 14 hours	John Gallagher (john.gallagher...)	No owner	Short	\$12,000	20%	EAC
Pure Strategies EACs (unknown en...	--	Consultant	Discovery Completed 17 hours	John Gallagher (john.gallagher...)	No owner	Short	\$12,000	20%	EAC
Test CLONE	--	CNG	Discovery Initiated 4 days	Cian Boland (cboland@peritidi...)	David Lally (dally@peritidigital...)	--	--	1%	--
TJX CLONE	--	--	Discovery Initiated 4 days	Jordan Wall (jordan.wall@stxgr...)	Jordan Wall (jordan.wall@stxgr...)	--	--	1%	--
Havell Investments	--	--	Discovery Initiated 4 days	Sarah Dahl (sarah.dahl@stxgr...)	No owner	--	--	1%	Carbon Offset, EAC
Deciem - VER Deal	--	Corporate	Negotiations Initiated 5 days	Amalie Doetsch (amalie.doetsc...)	Amalie Doetsch (amalie.doetsc...)	Short	\$10,000	90%	Carbon Offset
SalonCentric - 2025 RECs CLONE	--	Corporate	Follow-up Agreed 5 days	Mark Scorsolini (mark.scorsolin...)	Amalie Doetsch (amalie.doetsc...)	Short	\$60,000 10%	50%	EAC

# Creating deals – deal information



The screenshot shows a 'Create Deal' form with a teal header bar containing the title and a close button. Below the header is an 'Edit this form' link. The form fields are as follows:

- Deal name \***: A text input field.
- Pipeline \***: A dropdown menu with 'RNG US' selected.
- Deal stage \***: A dropdown menu with 'Discovery Initiated' selected.
- Dependent properties ⓘ**: A section containing:
  - Account Type \***: A dropdown menu.
- Deal owner \***: A dropdown menu with 'Werner Schoeman' selected.
- Strive Owner**: A dropdown menu with 'No owner' selected.
- Country**: A dropdown menu.

Creating deals consist of two components: deal information and associations (next slide).

**Remember:** You can have more than one deal with a company, so create a separate deal for each product!

## Deal information:

- **Deal name:** Be consistent in the naming, e.g. [company name] – [product]
- **Pipeline:**
  - **Strive:** Select the relevant product pipeline OR Strive pipeline (see [decision diagram](#))
  - **Other teams:** Choose your team's pipeline.
- **Deal owner:**
  - The deal owner should always be the lead from the relevant square. So, for collaborative deals between Strive and RNG, the RNG lead should be made the deal owner. Strive should only be the deal owner for deals in the Strive pipeline.
- **Strive owner:**
  - This is an optional field. Add the Strive lead for collaborative deals. **Please note that this will create a clone of the deal in the Strive pipeline for visibility.**

# Creating deals – associations

The screenshot shows a user interface for associating deals with contacts and companies. It is divided into two main sections: 'Contacts' and 'Companies'. Each section has a search bar for 'Associate records', a dropdown for 'Association label', and a checkbox for adding timeline activity. The 'Contacts' section has a 'Last 30 days' filter and a checked checkbox. The 'Companies' section has an 'Associate records \*' label, an 'Association label \*' with an info icon, and an unchecked checkbox.

**Associate Deal with**

**Contacts**

Associate records

Search

Association label

No label

☒ Add timeline activity from this contact starting from  
Last 30 days

+ Add more

**Companies**

Associate records \*

Search

Association label \* ⓘ

Primary

☐ Add timeline activity from this company ⓘ

+ Add more

It is required to associate contacts and companies to deals:

- **Contact associations** help track all correspondence related to the deal.
- **Company associations** show which organization the deal is linked to.

You can add multiple contacts or companies to a deal, but only include those directly involved to keep tracked correspondence relevant.

Add the activity timeline to make past correspondence visible on the deal record.

# Adding collaborators to deals

SalonCentric - 2025 RECs

Amount: \$60,000

Close Date: 

MM/DD/YYYY

Stage: Follow-Up Agreed

Pipeline: US Certificates

Note

Email

Call

Task

Meeting

More

> About this deal

Actions

> Opportunity Metrics

Actions

> Strive Deal Metrics

Actions

> Collaborators

+Add

Once a deal has been created, you can add “Collaborators” to the deal on the deal record to enable colleagues from other teams to view and edit your deals.



# Moving a deal to a different pipeline

(Strive only)

The screenshot shows the Strive CRM interface for a deal. On the left, the deal details are displayed: 'Pure Strategies EACs (unknown end client)', Amount: \$12,000, Close Date: MM/DD/YYYY, Stage: Discovery Completed, and Pipeline: Strive US (highlighted with a red box). Below the details are icons for Note, Email, Call, Task, Meeting, and More. On the right, the 'Activities' tab is active, showing a search bar, tabs for Activity, Notes, Emails, Calls, and Tasks, and a filter bar. A message states 'This deal was created by John Gallagher'.

Sometimes, Strive will need to move a deal from the Strive pipeline to a product pipeline when it becomes a collaborative deal.

- Click the pipeline dropdown and select the new pipeline and deal stage. You will be asked to fill in the relevant dependent properties from that deal pipeline.
- After moving the deal, assign yourself as the Strive owner to trigger the workflow that creates a clone of the deal in the Strive pipeline.
- Then, assign the product lead as the new "Deal owner."
- Add "Collaborators" to the new deal (they will not be transferred)

## IMPORTANT:

The sequence matters: adding a "Strive owner" before changing the pipeline won't trigger the cloning workflow. And if you change the "Deal owner" before assigning yourself as "Strive owner," you'll lose access to the deal.

# Cloned deals

(Strive only)

- Cloned deals allow Strive to track deals from other pipelines within the Strive pipeline.
- Cloned deals are labeled with "CLONE" in the title and are linked to the original deal.
- Never edit the cloned deal—always make changes in the original deal in the product pipeline.
- Updates to the original deal will sync to the clone, but changes may take time to appear due to the complexity of the workflow.

< Deals

Actions ▾

SalonCentric - 2025 RECs **CLONE**

Amount: \$60,000

Close Date: 

MM/DD/YYYY

Stage: Follow-up Agreed ▾

Pipeline: Strive US

Note

Email

Call

Task

Meeting

More

About this deal

Opportunity Metrics

Strive Deal Metrics

Collaborators

Actions ▾

Actions ▾

Actions ▾

+Add

Overview

Activities

Search activities

Expand all ▾

Activity

Notes

Emails

Calls

Tasks

Meetings

Filter by: Filter activity (1/21) ▾

All users ▾

All teams ▾

This deal was created

Mar 27, 2025 at 7:59 PM GMT+1

Customize record

>>

Companies (1)

+ Add

Primary

SalonCentric

Company owner: Amalie Doetsch

Company owner backup: --

Strive global account manager: --

View associated Company

> Contacts (0)

+ Add

> Deals (1)

+ Add

SalonCentric - 2025 RECs

Amount: \$60,000.00

Stage: Follow-Up Agreed ▾

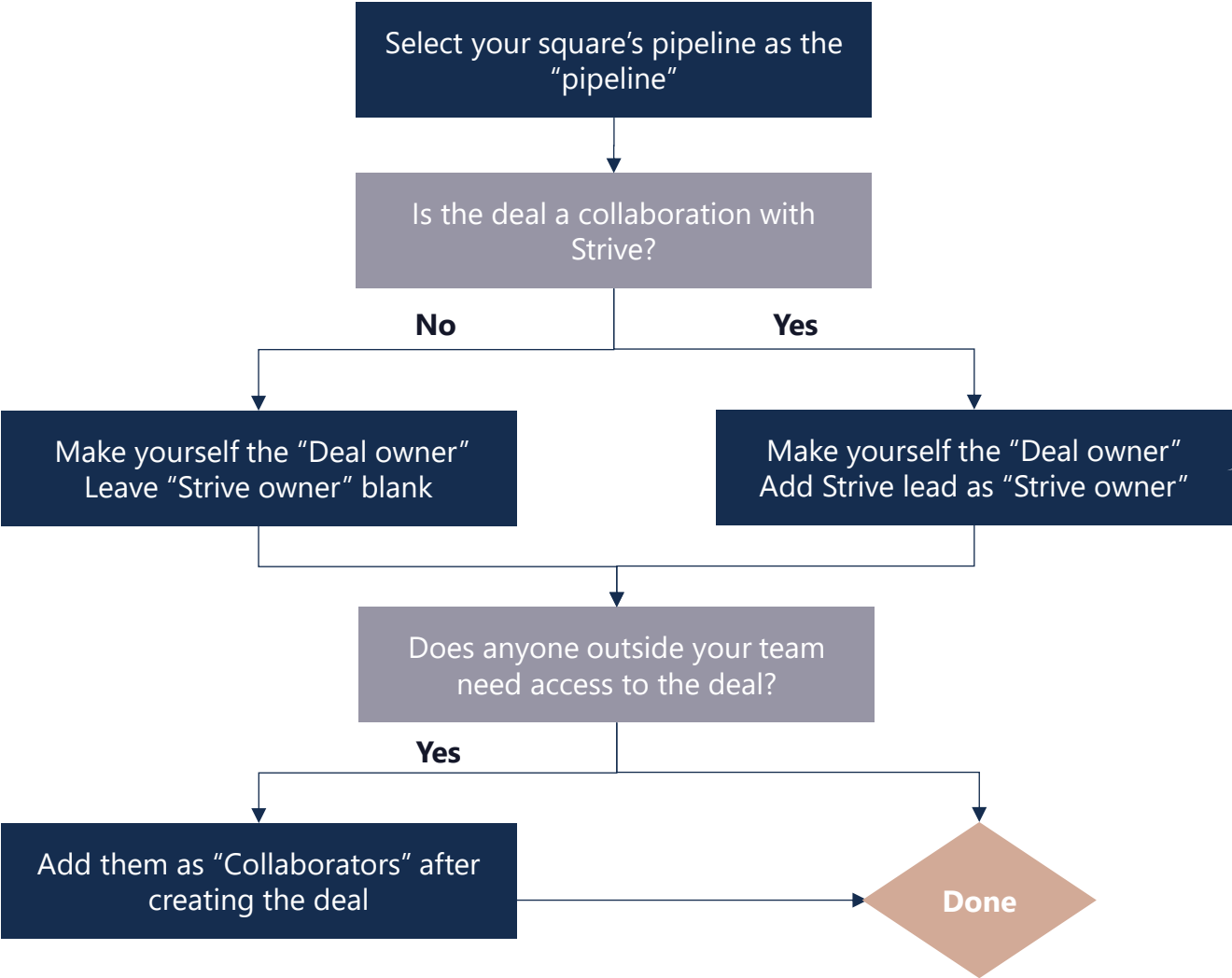
View associated Deal

> Attachments

Add ▾

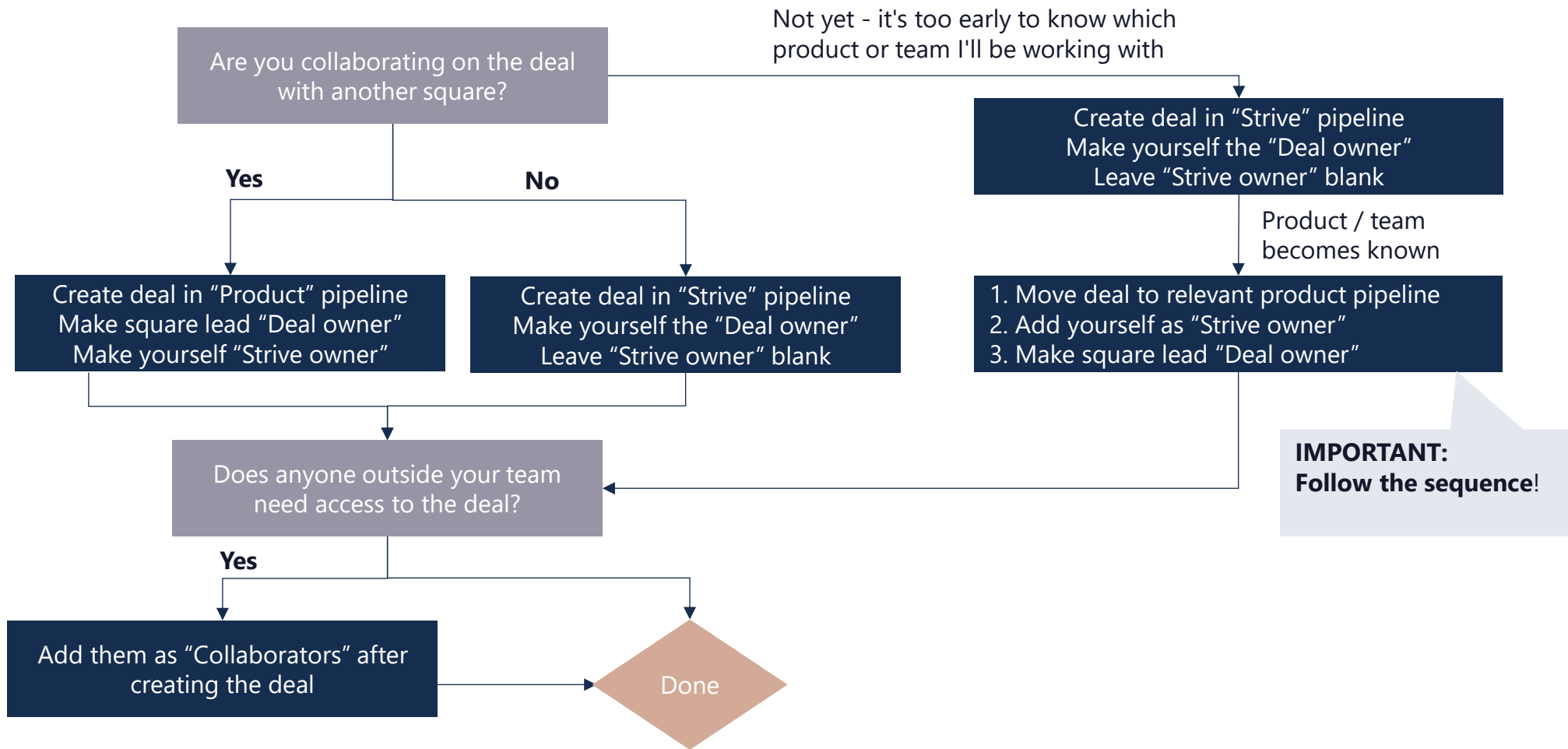
Click here to navigate to the original deal

# Deal creation workflow for all product squares, except Strive



Adding a "Strive Owner" will create a clone of the deal in the Strive pipeline. This can be done at any time, also at a later stage or for existing deals.

# Deal creation workflow for Strive



# Progressing deals through deal stages

Strive US Deal owner Create date Last activity

Search name or description

DISCOVERY INITIATED 294 DISCOVERY COMPLETED 14

EMCOR Group, Inc. 2021  
RECs  
Amount: \$12,000  
Product Interest: EAC

Kaiser Permanente  
Product Interest: PPA/VPPA, Carbon Offset  
RH  
Email 2 hours ago  
! No activity scheduled  
Note a day ago  
Task due in 2 months  
ACs  
(unknown end client)  
Amount: \$12,000  
Product Interest: EAC

Test CLONE

Dependent properties

Your organization has chosen to show these properties based on your choice for "Deal Stage". Some properties may be required to continue.

Deal Stage  
Discovery Completed

Structure \*

Amount \*

Deal probability \*  
1%

US Cert. Tech \*

Voluntary Certifications \*

Cert. Regions

Prod. Start Date  
MM/DD/YYYY

Tenure/Term

Tenure/Term Extension Option

Volume (GWh/year)

Volume (GWh total)

Drag and drop deals to move them between stages. When a deal enters a new stage, tailored required and optional fields will appear—striking a balance between data quality and ease of use to minimize friction while capturing valuable insights.

We always ask to update three fields for all deal stages:

- **Amount:** The best guess of estimate of the potential **margin** to be made on the deal.
- **Deal probability:** The likelihood that STX/Strive will win the deal in percentages.
- **Close date:** Your best guess for when the deal could close.

We know these three fields can be hard to fill in early, but they're key for accurate forecasting. That's why we ask at every stage—to improve data quality as the deal progresses.

**HINT:** Be conservative—it's always better to surprise on the upside!



# Sequences



# What are sequences?

[Learn More](#)

## What it does

A sequence is a series of targeted, timed actions used for cold outreach and to nurture new contacts. With it, you send:

- Pre-created [email templates](#) at specific times that you can personalize and tailor to the prospect
- Automatically [create tasks](#) or reminders for yourself to follow-up with the contact by calling, connect with them on LinkedIn etc.
- When the contact replies to your email, they are **automatically unenrolled** from the sequence!!

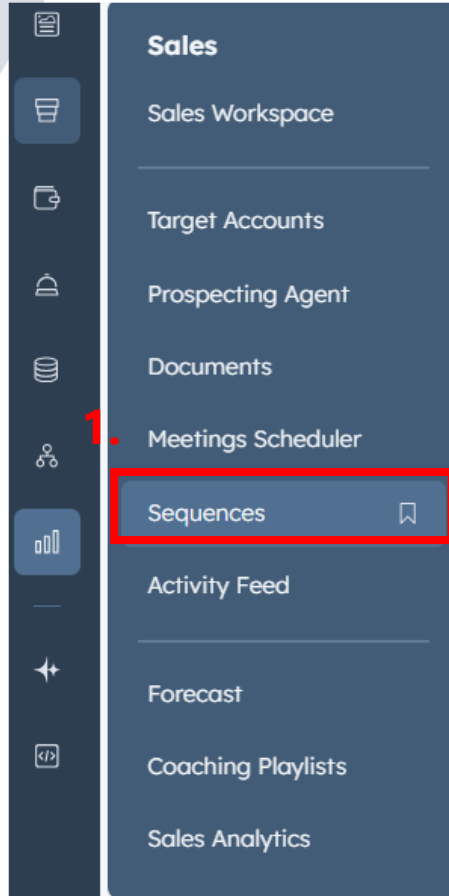
## Example of a sequence

- Send a cold outreach email based on a pre-created template at 14:00 on the first coming Monday.
- Set a reminder to call the prospect two business days later (you can manually unenroll them if they answer!)
- Set a reminder to send an LinkedIn InMail one business day later.
- Send a follow-up second cold outreach email based on a pre-created template two business days later if s/he has not responded.
- Set a reminder to connect via LinkedIn.
- Unenroll the contact if they did not respond.

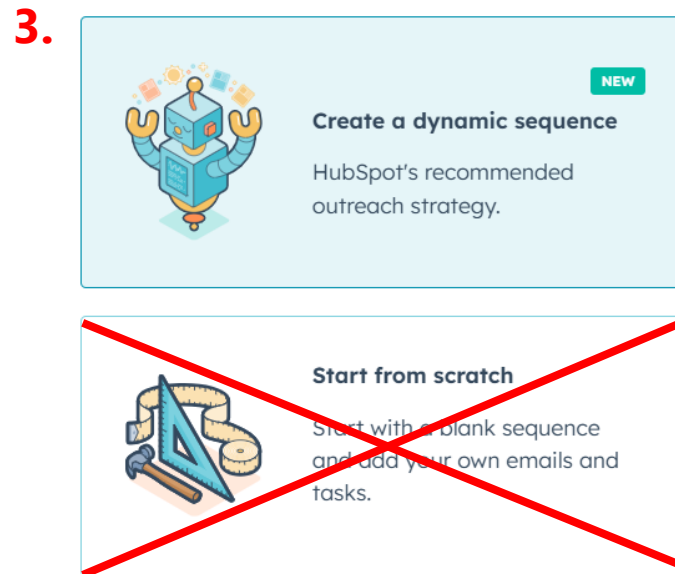
## Requirements

- Sales License
- Outlook and Sales Navigator must be connected to Hubspot

# Step 1: Create a new sequence



1. Select sequences
2. Select create sequence
3. Select Dynamic sequence OR a pre-made template



## Why select dynamic sequences?

With both dynamic and regular sequences, you can send automated emails and create manual tasks for yourself. With a dynamic sequences, you can opt to only trigger a manual task if the contact engages with the email by opening it. This ensures you only do the manual tasks for those contacts that show "intent" or interest in your outreach.

# Setting up your sequence

1.

My first sequence

StepsSettingsAutomate

AUTOMATED STEPS0

DAYS TO COMPLETE2

MANUAL STEPS0

UNENROLL CRITERIA2

Configure your initial step

2. All contacts will receive this first step

Automated email

Automatically send an email for me

Add automated email

Email template

Choose an existing template or create a new one

Create template

All templates

Search templates

Power Broker Outreach

Updated 12 hours ago by Nathan Buckler

cold short

Updated 12 hours ago by Lucia Campomanes Gonzalez

reconnecting with past clients

Updated 7 days ago by Lucia Campomanes Gonzalez

1. Name the sequence
2. Select automated email
3. Create a new template for the campaign or select one created by your colleague

(Remember to team up to save time and help your colleagues!)

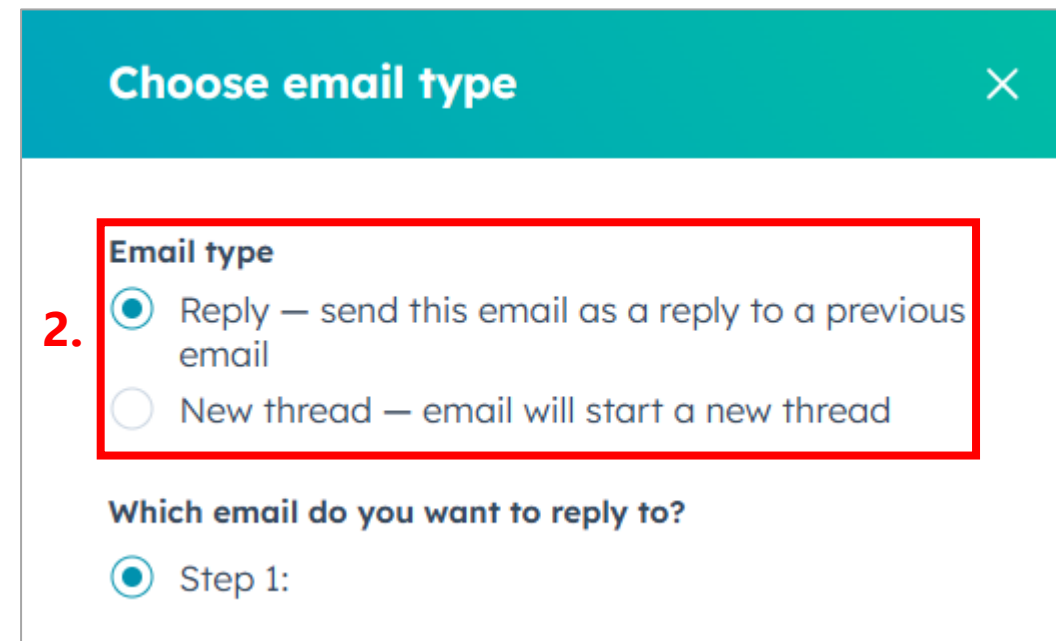
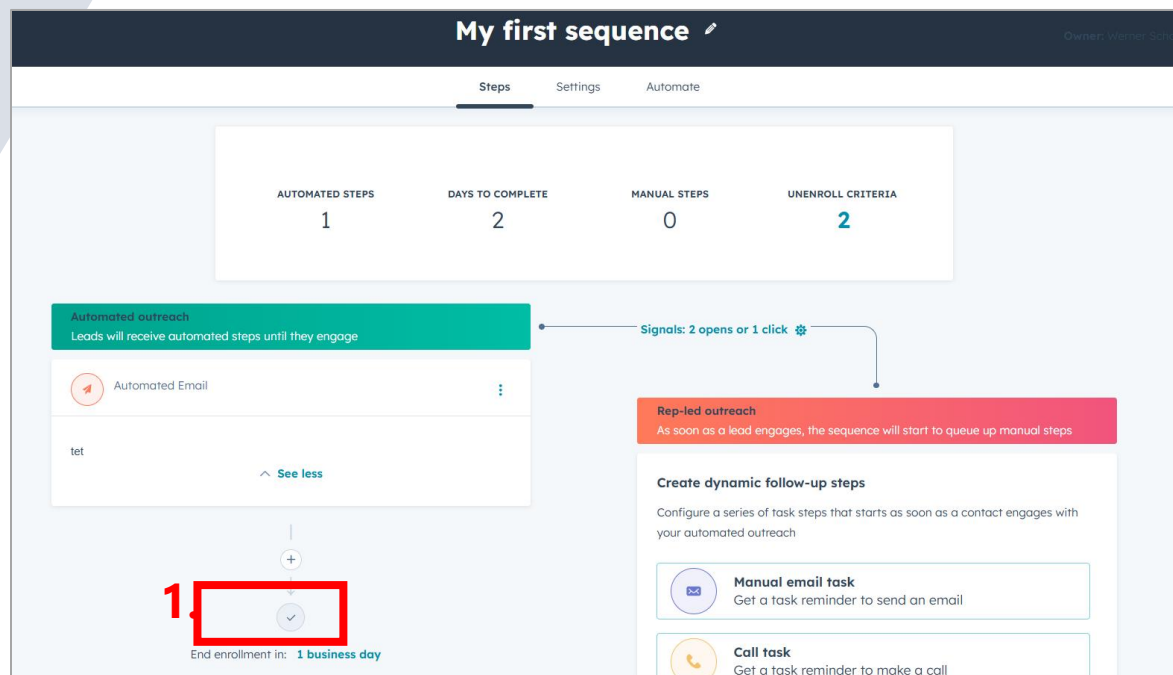
# Creating you email template

The screenshot shows the 'Create new template' dialog in HubSpot. It includes a teal header with the title and a close button. The main area has a 'Name' field (step 1), a 'Subject' field (step 2), and a 'Shared with everyone' dropdown. Below these is a 'Personalize' button (step 3) and an 'Insert' dropdown. A modal window titled 'Insert personalization token' is open, showing a list of tokens like 'Contact', 'First conversion', and 'Contact information'. At the bottom, there's a 'Generate template with AI' button (step 5), an 'Edit signature' button (step 4), and 'Save template' and 'Cancel' buttons. A note at the bottom states: 'Your signature will be included when you use this template'.

1. Name the template (this is internal use and to find it easily in your sequence)
2. Write the email subject and body, select who you want to share it with (choose your team!) and where to save it (create a folder for your team if it does not yet exist!).
3. Remember to personalize emails by inserting personalized tokens, such as <<first name>>, <<company name etc>>.
4. **IMPORTANT:** Make sure you have set up your signature in HUBSPOT! You need to do this manually, it does not happen automatically through Outlook. See instructions [here](#).
5. Feeling uninspired? Use Hubspot's AI to help with the first draft, but always **remember to proofread the final version!**

\* It's very important to import new contacts correctly for this to work. That's why the marketing team created templates to import potential leads for you. Please reach out if you need support!

# Add additional follow-up emails



1. Add additional automated emails
2. Choose between creating a new thread / email or a "reply" email. A "reply" email will look like you are responding to the original automated email you sent, which makes it look you are following up on it.



# Set up additional criteria to unenroll leads from the sequence

**sequence** ✎

ings Automate

**MANUAL STEPS** 0 **UNENROLL CRITERIA** 2

Signals: 2 opens or 1 click ⚙️

**Rep-led outreach**  
As soon as a lead engages, the sequence will start.

**Create dynamic follow-up steps**  
Configure a series of task steps that starts as soon as a lead engages.

**Edit Engagement Signals** ✕

**Engagement signals**  
Rep-led outreach will start when a contact meets any of the following criteria. Changing engagement signals will impact enrollments currently in progress.

**Email opens** **Count**  
☒ ON 2

**Clicks** **Count**  
☒ ON 1

- These “engagement signals” will “unenroll” the lead from the sequence, meaning they will no longer receive automated emails.
- This unenrollment criteria are IN ADDITION to them replying to your automated email in which case they always unenrolled by default for any sequence.

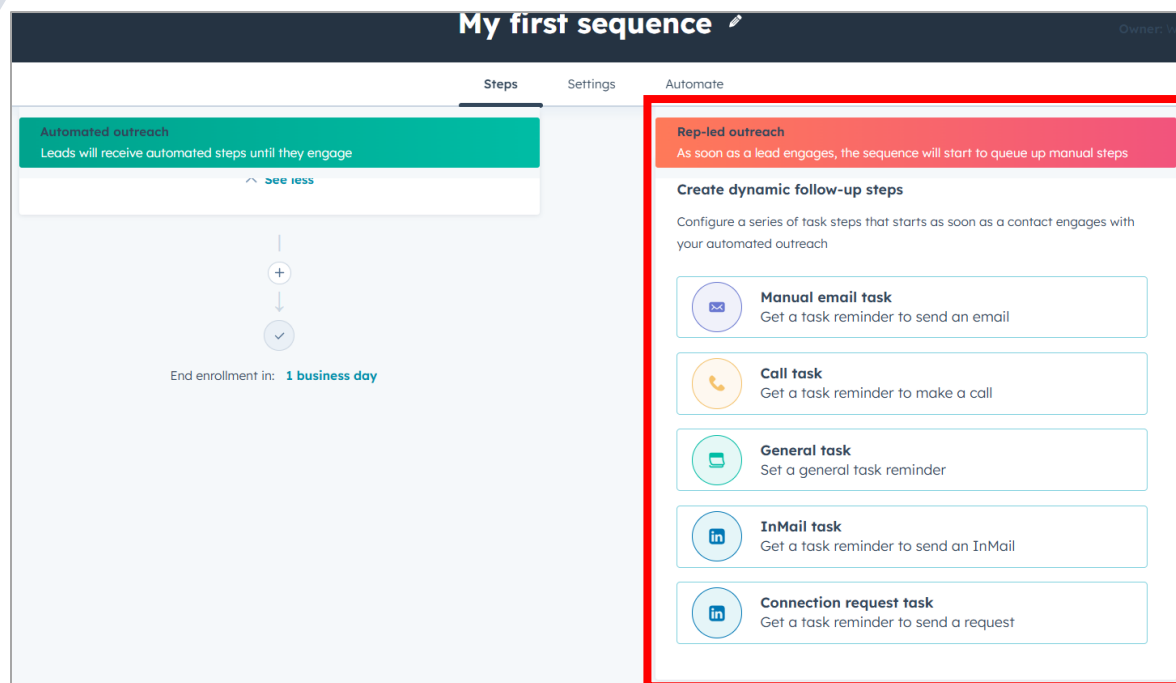
## Engagement signals include:

- **Email opens:** The recipient opened the email suggesting they may have read the content.
- **Clicks:** The recipient clicked on a link in the email.

## Why use engagement signals to unenroll?

- These engagement signals suggest they may be more open to outreach. Unenrolling them allows for more personalized contact, like cold calling, helping you focus on prospects most likely to respond.

# Set up manual tasks for recipients who engaged with your emails



- Manual tasks can include, reminders to email directly, call them or connect via LinkedIn.
- It is most beneficial to set this up and start using HubSpot tasks as part of your normal work routine. Click [here](#) to learn more.
- If you don't use the tasks workspace – which we highly recommend – you need to use email reminders for these tasks to be notified of them.

# Confirm the setting of the sequence

**My first sequence** ✎

Steps Settings Automate

**1.** Execute steps on business days only  
If enabled, emails will be sent and tasks will be created on business days only. **ON** ✓

**2.** Automated email send window  
When enrolling a contact, you can customize the specific send time & time zone.

Send window  
🕒 8:00 AM → 🕒 6:00 PM  
⚡ HubSpot will choose times with the highest open rate during this range. [Learn more](#) ⓘ

**3.** Tasks

Email reminders  
Receive an email reminder at the time you choose. **ON** ✓

Reminder time  
🕒 8:00 AM

**4.** Campaigns

Add to marketing campaign  
Add this sequence to a campaign, so you can track, manage, and report on this and other connected marketing assets.  
[Discover the benefits of campaigns](#) ⓘ

Select a campaign ▼

1. Make sure to only send automated emails during week days.
2. Hubspot will send the emails during the “recipients” time zone. If it does not know the recipients time zone, it will default to Eastern Daylight Time. The system will know this if the person has interacted with any of our Marketing or Sales outreach. The best time to choose is to send emails in the morning between 09:00 and 12:00. That way it will be during office hours even when Hubspot does not know the recipients time zone.
3. If you don’t use tasks, do set up an email reminder so you don’t forget to check in on your sequences.
4. If they outreach forms part of a Marketing campaign, e.g. following up on a webinar you can select the campaign here. Marketing will provide you with this information.

# Set up the automations

< Back **My first sequence** Owner: [name] | Sequence Save

Steps Settings **Automate**

**1.** Automate your sequence

The following automations are created by HubSpot and some may not be turned off

When a contact replies to any email → Unenroll the contact from this sequence	<input type="checkbox"/>
When a contact books a meeting → Unenroll the contact from this sequence	<input type="checkbox"/>
<b>2.</b> When a contact replies to any email or books a meeting → Unenroll all contacts at the same company from this sequence	<input checked="" type="checkbox"/>

Custom automations

Use automation to enroll or unenroll contacts from this sequence

Create an automation

1. Contacts will automatically be unenrolled if they reply to an email or book a meeting with you using the meeting scheduling link (which you can add to the automated emails).
2. If you are reaching out to multiple people at the same company, make sure this is switched on so you unenroll everyone if one of the people responds. This prevents us spamming prospects.

# Save the sequence

Save and manage sharing

×

Sequence name \*

My first sequence

Who can see this sequence?

☒ Private ⓘ

☐ Everyone

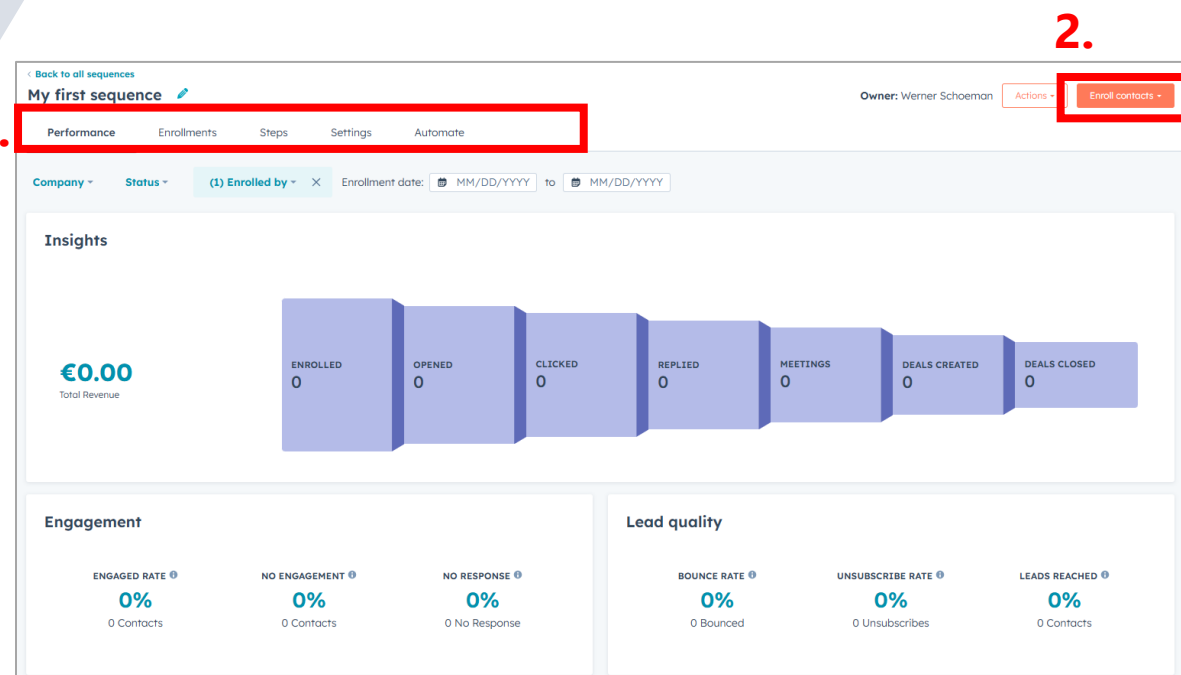
☐ Specific users or teams

Save

Cancel

Be sure to coordinate with your team upfront if you create a sequence to avoid duplicating efforts!

# When you finished creating the sequence, it will take you to the overview where you can see how your sequence is performing



1. Click on the top menu bar to edit the sequence.
2. Manually enroll contacts



# Other ways to enroll contacts in a sequence

## Adding contacts on a list to a sequence

- 1. Navigate to lists.
- 2. Select the list provided by Marketing
- 3. Select the contacts you want to enroll. The top left checkbox selects all

Companies

Opportunities

Tickets

1. Trades

**Lists**

Inbox

☐

NAME

FY26 STRIVE US - All leads - Updated List

Updated List

☐

FY26 STRIVE US

Details

More

Search in list

25 selected

3. Enroll in sequence

Exclude from list

Create lead

<input checked="" type="checkbox"/>	NAME	EMAIL	PHONE NUMBER	CONTACT
All 25 rows on this page are selected. Select all 197 records.				
<input checked="" type="checkbox"/>	Ben Gruitt	ben_gruitt@mccormick.com	2404183460	
<input checked="" type="checkbox"/>	Maggie Hume	maggie.hume@interface.c...	--	

## Add them directly from the contacts overview

Search name, phone, ema

3 selected

Enrich records

Assign

Share

Edit

Delete

Create tasks

Enroll in sequence

Create

	NAME	COMPANY NAME	CONTACT → COMPANIES	PHONE NUMBER
<input type="checkbox"/>	--	EG Retail (Belgium) BVBA	EG Retail (Belgium) B...	--
<input checked="" type="checkbox"/>	--	Totsa Total Oil Trading	--	--
<input checked="" type="checkbox"/>	--	Gemeente Overbetuwe	--	--
<input checked="" type="checkbox"/>	--	CSO Oil Storage Netherlands...	CSO Oil Storage Neth...	--

HubSpot Sales

Message tools

☐ Track email opens and clicks

☐ Log No records

Templates

**Sequences**

Or from  
within Outlook

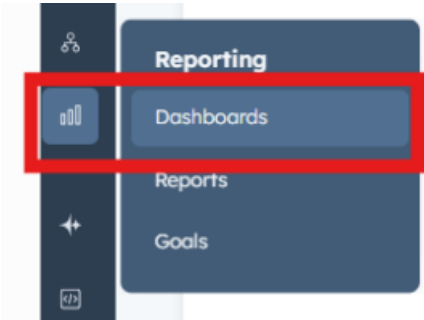
# Reporting Dashboards



# How to access your dashboards

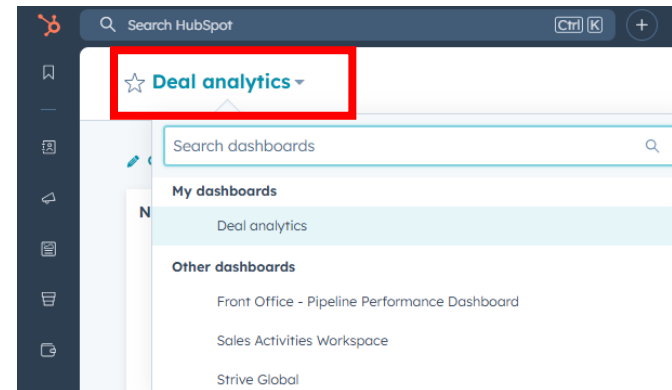
Navigate to:

**Reporting > Dashboards**



**Select the right dashboard**

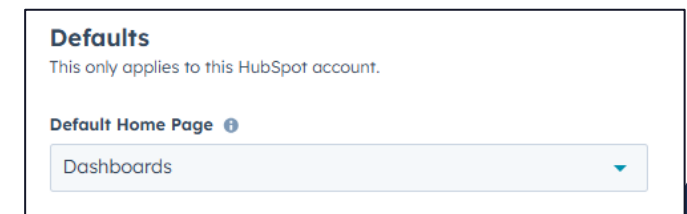
(Depending on your team and role, the available dashboards can differ)



**Bookmark / set as homepage**

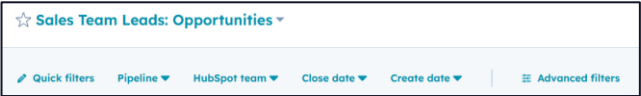
Click the 'Favorites star' next to the dashboard name to make it the first dashboard you will land on.

Under settings, when you scroll down, you can set the dashboard as your home page within HubSpot.



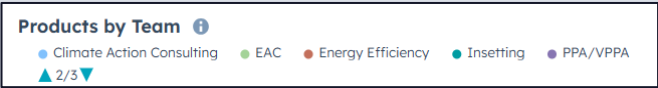
# How to get the most out of your dashboards & reports

## Dashboard filters:



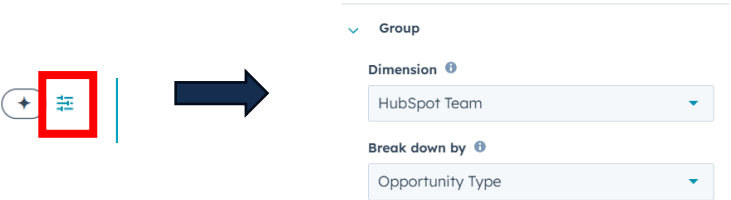
At the top of the dashboard, you can find the quick filters. Once you select a filter here, it will be applied across the reports in the dashboard in all reports where this filter can be selected.

## Report Legend:



Within a report, there may be a legend to specify break downs. You can hover over one of the items to see that highlighted in the report, or you can (un)select to cater the report to your needs.

## Report level filters:



At the top right of a report, you can click the three lines to open the report menu.

In the pop-up report menu, you are able to adjust the Dimensions or Break down of the report in some cases. These might allow you to gain different or additional insights.