STX

Hubspot User Guide

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7/23/2025

Feedback & Questions

We value your input!

Click here

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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

- X Hubspot is not a trading system
- X Replacement for ETRM or bid-offer tool
- X 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…

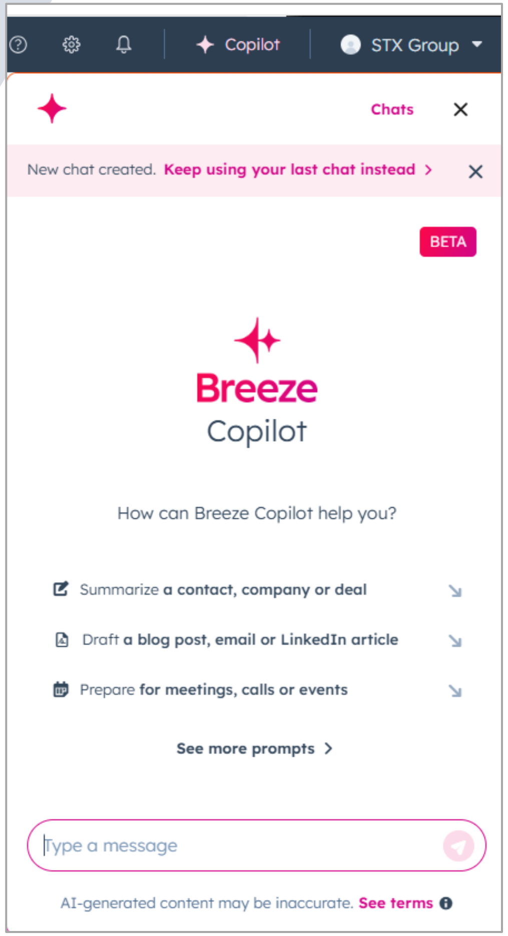
Important resources

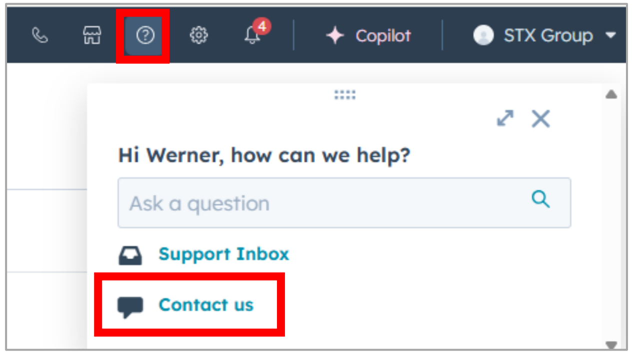
The Hubspot Academy is your friend!

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

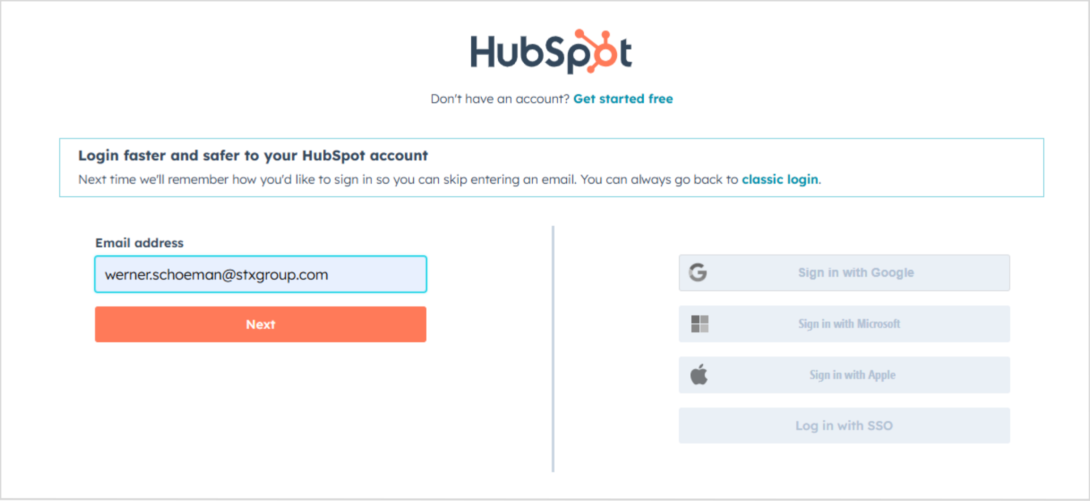
Configuration settings

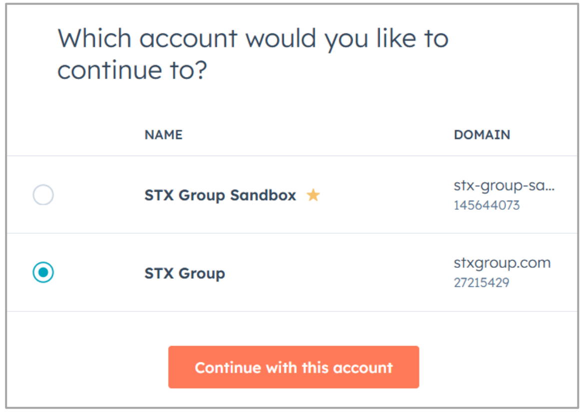
Logging in

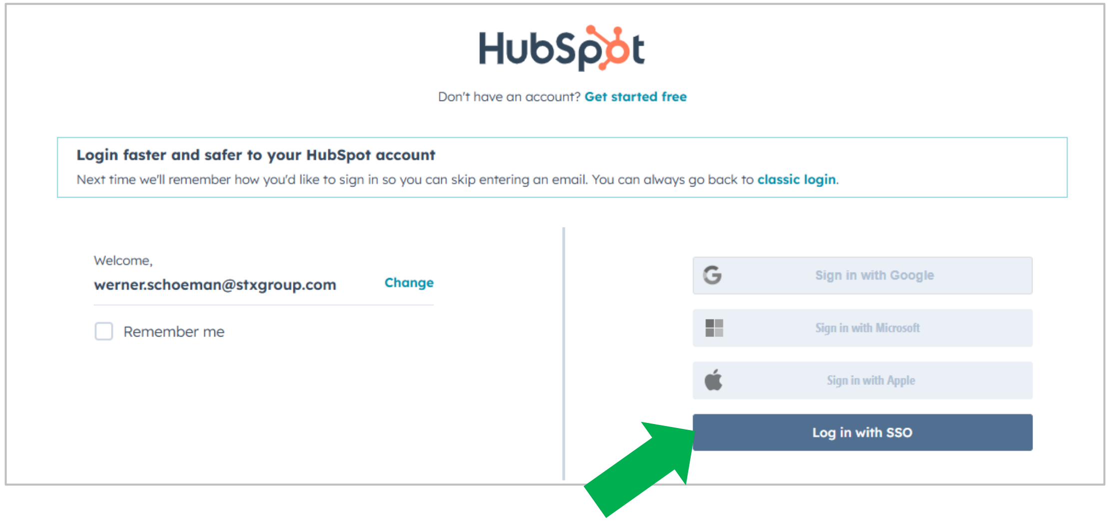
Hubspot is single-sign-on (SSO) using your Microsoft account and password

Remember to use the long form!
✓ Werner.schoeman@stxgroup.com
X wschoeman@stxgroup.com

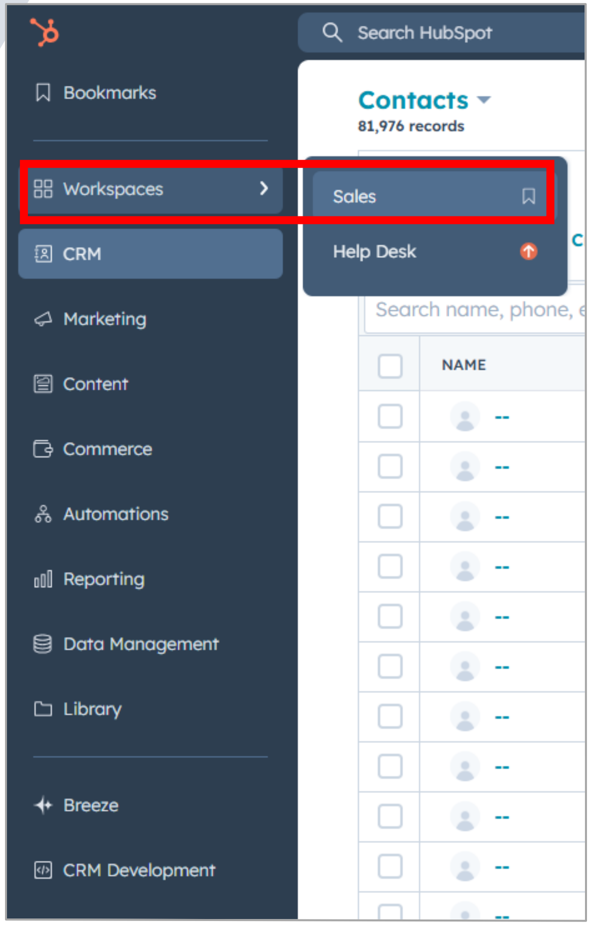
If prompted, select:
✓ STX Group
X Sandbox

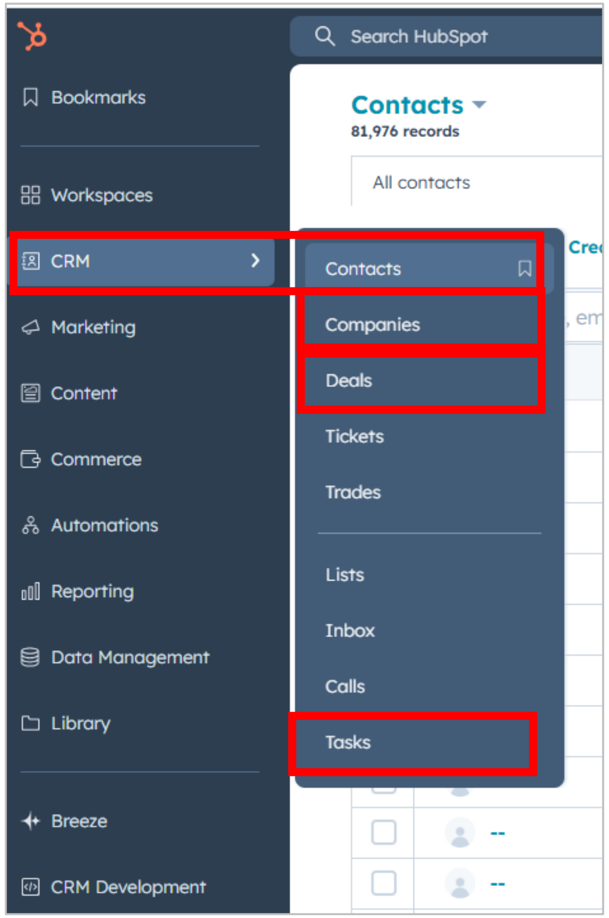


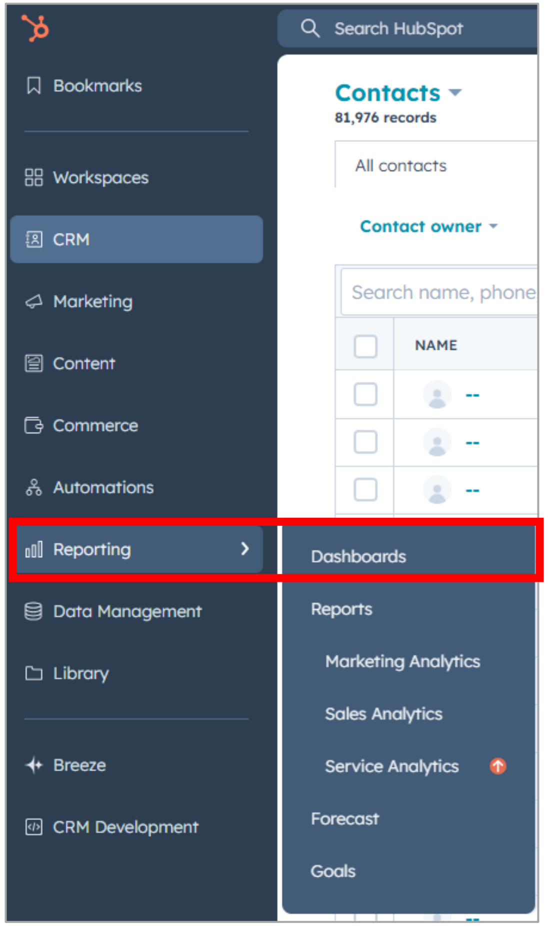


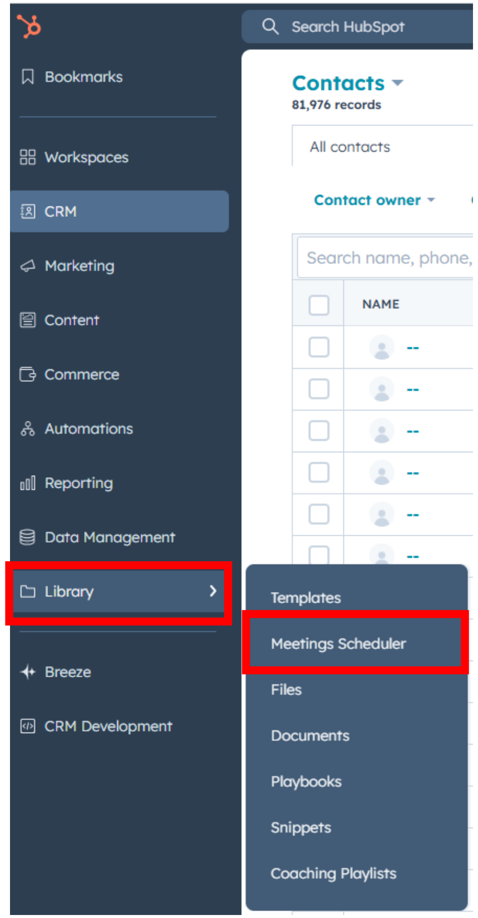


Navigating Hubspot: Which areas you will use as part of the MVP



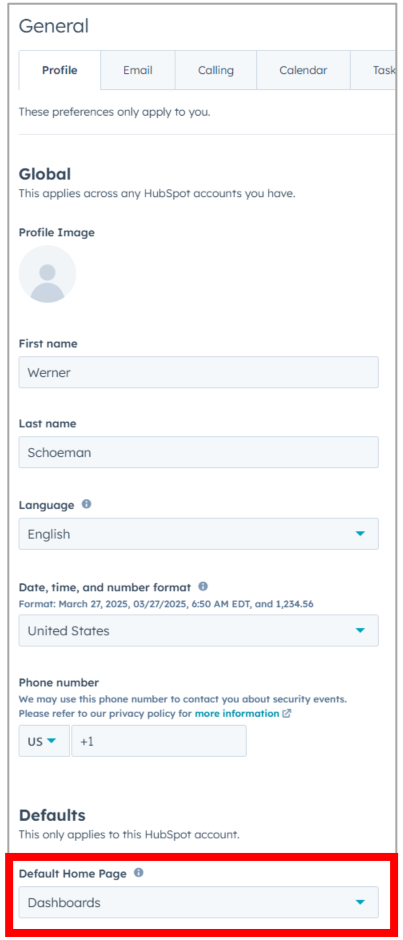




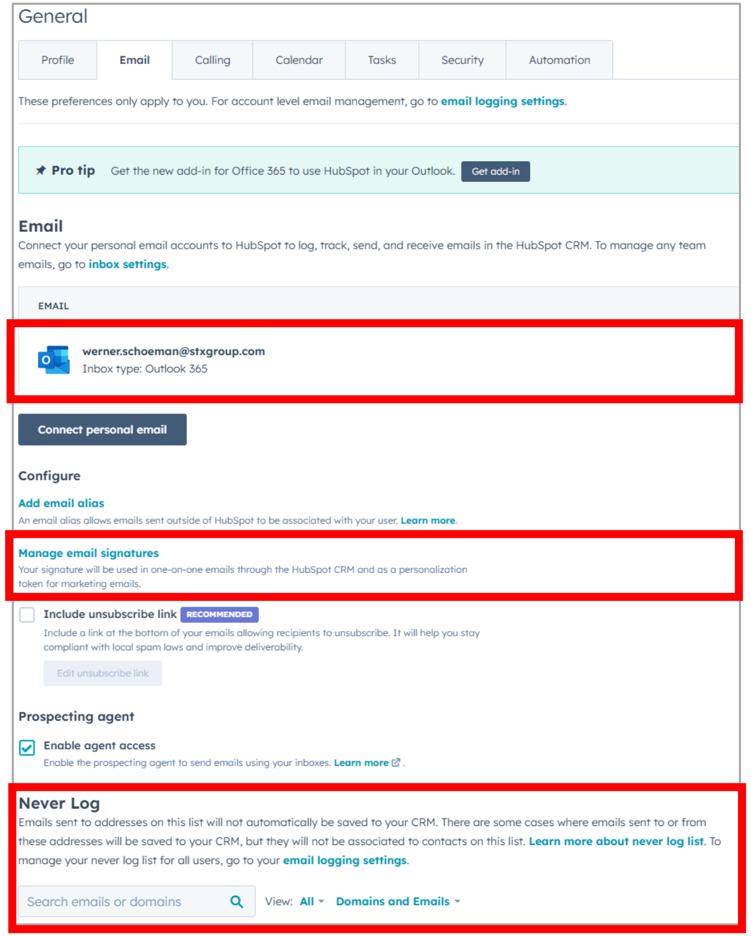


Your profile and the most important settings

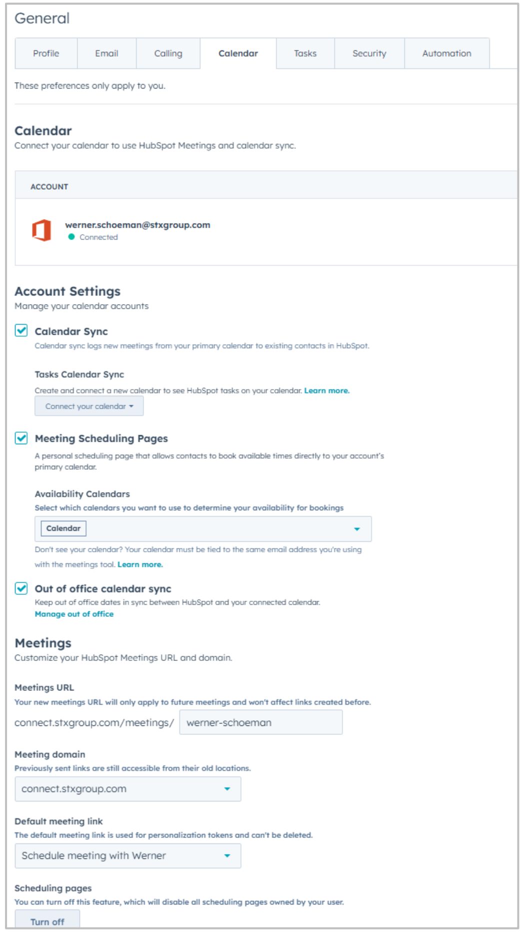
Basic info
Default homepage



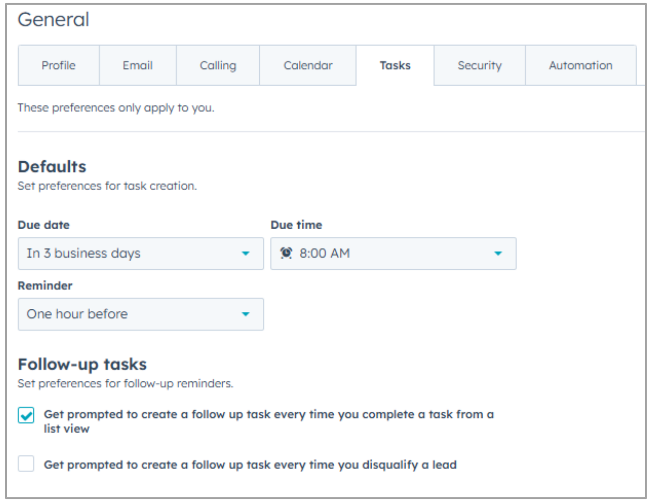
Email (Sales users only!)
Connect Outlook, add email signature, never log



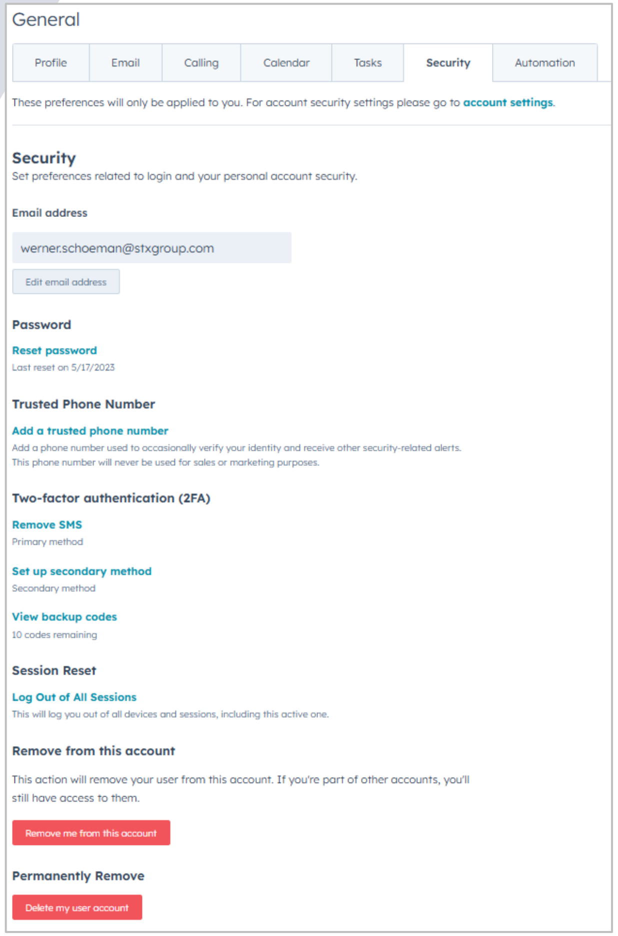
Calendar (Sales users only!)
Connect Outlook, sync calendar, enable meeting scheduling pages & OoO, customize domain



Task
Set default preferences



Security settings & email logging



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

Email logging

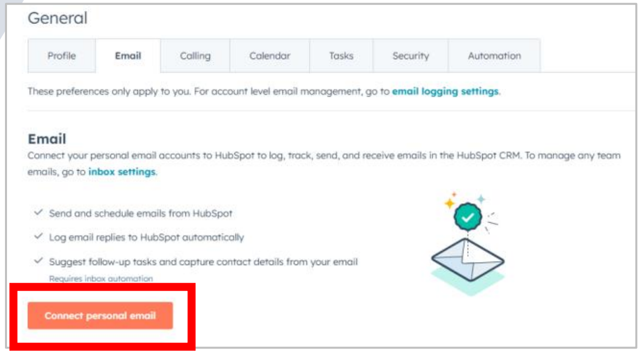
When you log an email, it becomes visible to your entire team. Logging sensitive or inappropriate emails can have serious consequences. **Never log emails that include confidential information**—such as correspondence with Legal, Tax, HR, or Finance providers, or messages containing personal details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

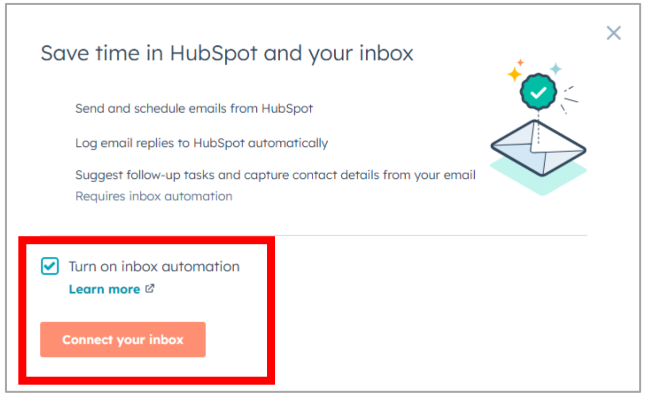
To prevent accidental email logging we have taken the following precautions:

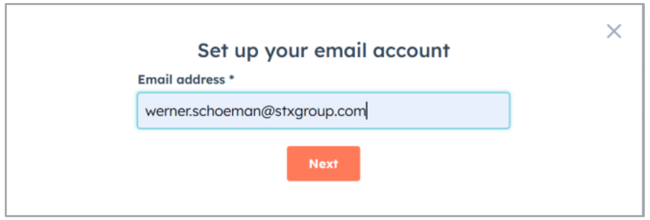
- We blacklisted internal domains so correspondence with colleagues cannot be logged,
- We blacklisted all our HR, Legal, and Tax advisors,
- We made email logging opt addition, so you need to use your own discretion when logging an email.

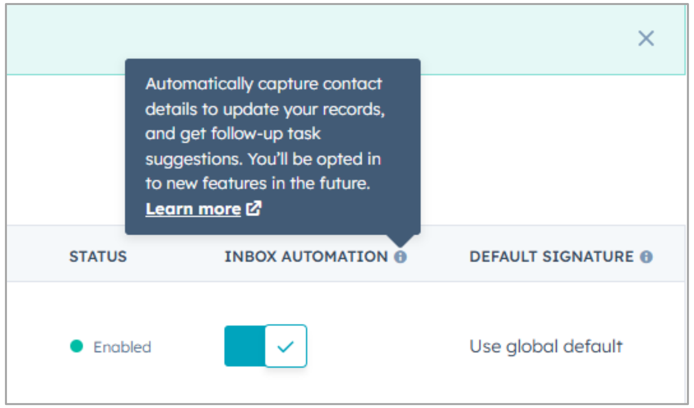
Additionally, please update your personal “never log” list (see previous slide for instructions). Use this to block specific domains—such as personal email addresses you might use when contacting family or partners from your work account, or domains of providers involved in sensitive discussions like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

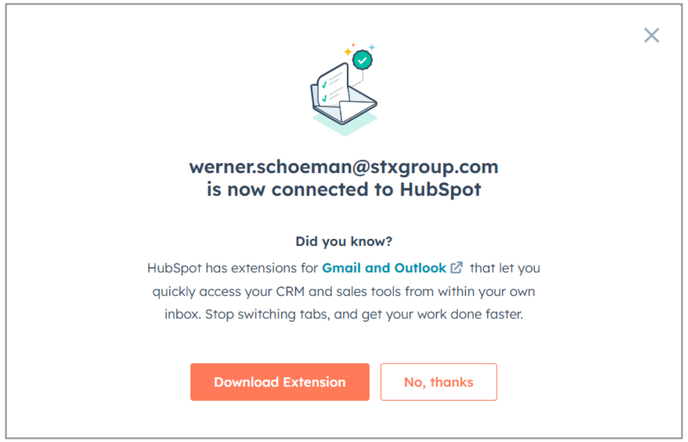
Connecting Outlook 365





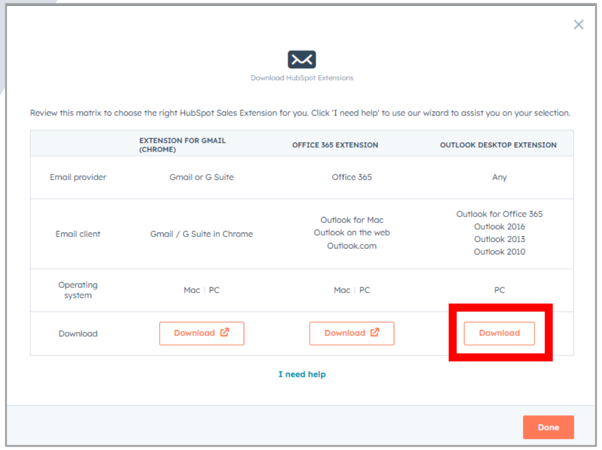


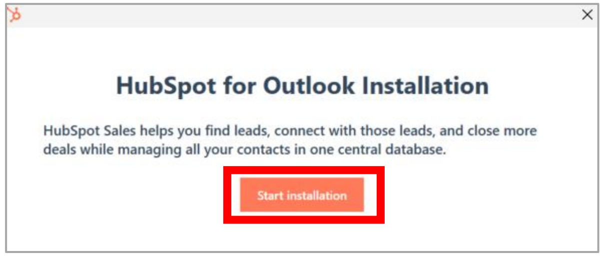


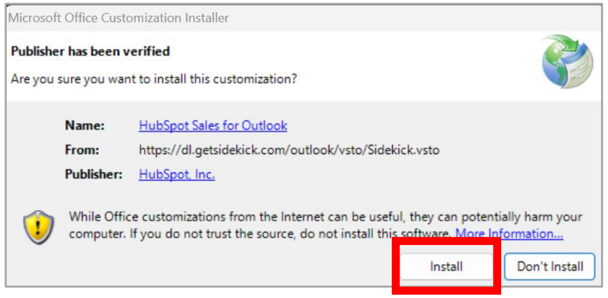


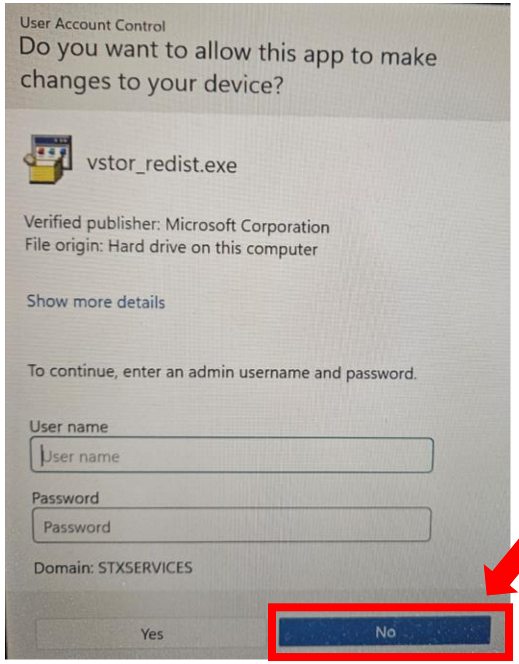
- **Navigate to:** Profile & Preferences > Email > Connect personal email
- Select "turn on inbox automation"> connect your inbox
- Enter your email > next
- Select > Connect Outlook 365
- A pop-up should appear asking you to download the extension for Outlook, select "download extensions"
- Afterwards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

Outlook extension



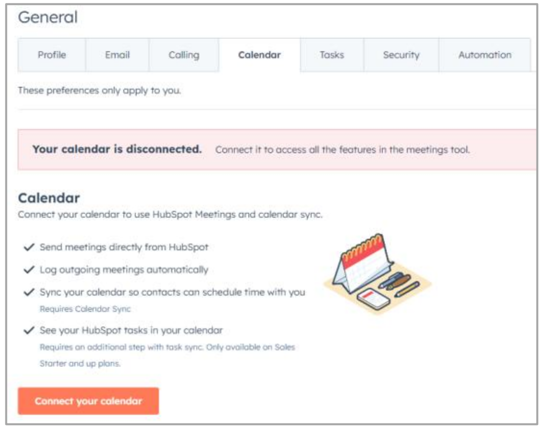


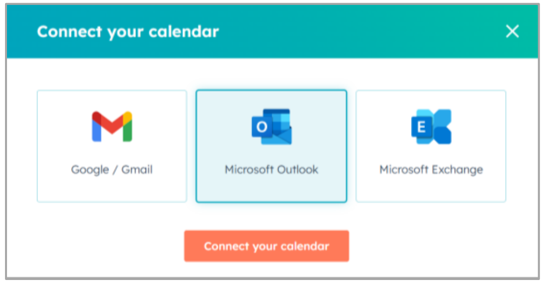


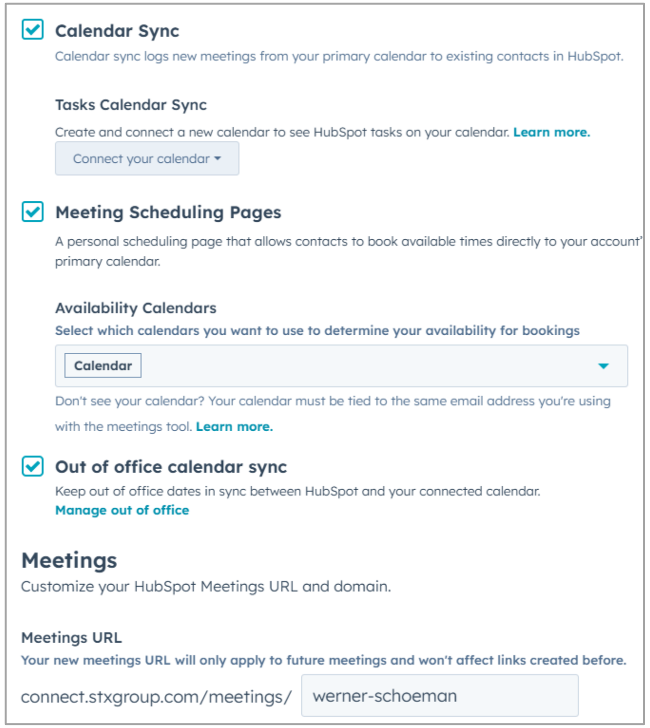


- Select download **Outlook desktop extension**
- Click through to continue installation
- You will be asked if you want to let vstor_redist.exe make changes to your device. Just click "no" and the installation will continue

Connect your Calendar



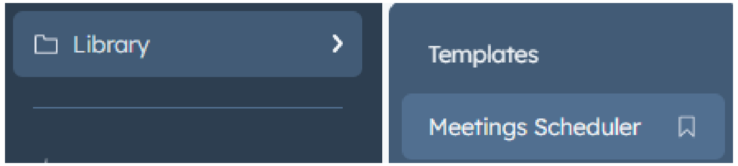


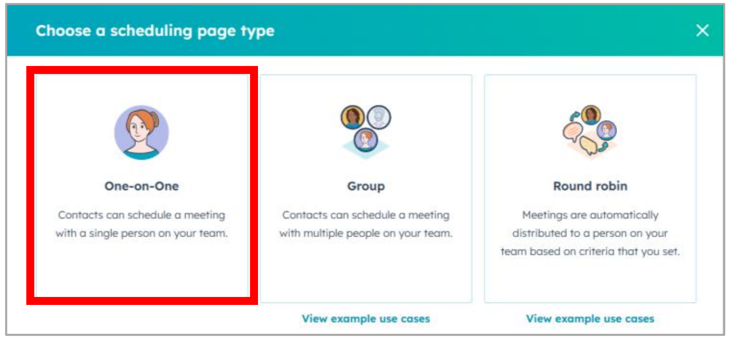


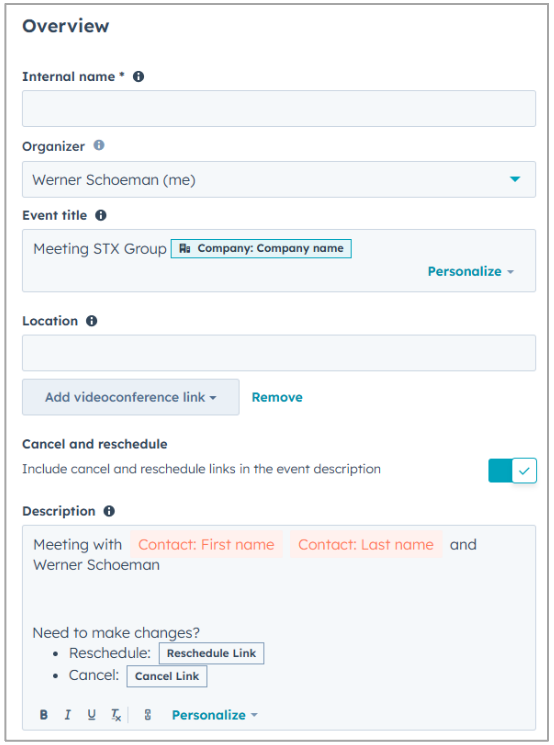
- **Navigate to:** Profile & Preferences > Calendar > Connect your calendar
- Select Microsoft Outlook > Connect your calendar
- Accept terms and log into Microsoft account to approve
- Make sure “calendar sync”, “meeting scheduling pages” and “out of office calendar sync” is turned ON
- Update your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

Set up a Meeting Scheduling page

Learn more



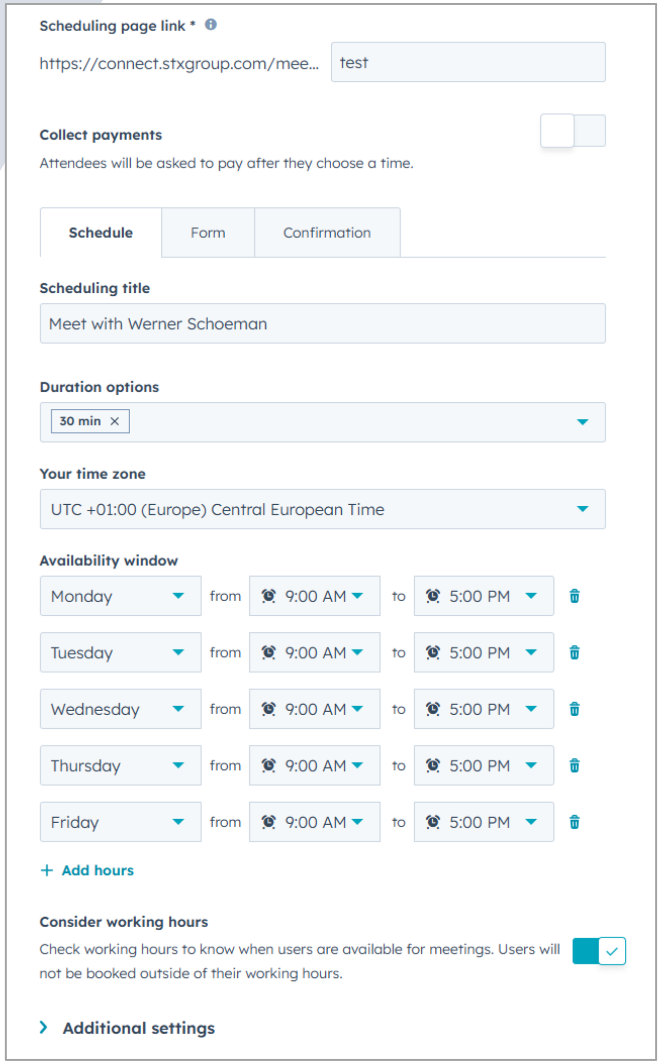


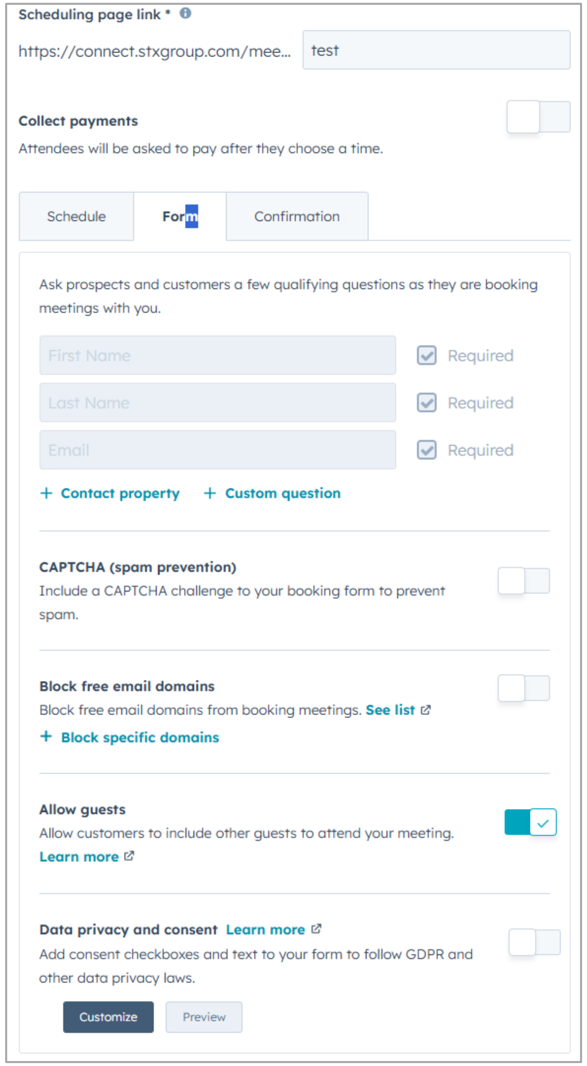


- **Navigate to:** Library > Meeting scheduler
- Select one-on-one (you can set up group meetings if you meet together with another team member often)
- Fill in your preferences:
  - **Internal name**: This is not seen externally. Be descriptive so you know which setup it refers to, e.g. 30 min or 60 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

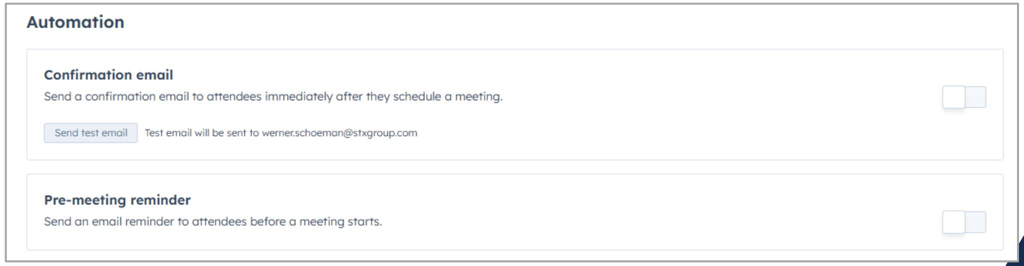
Learn more





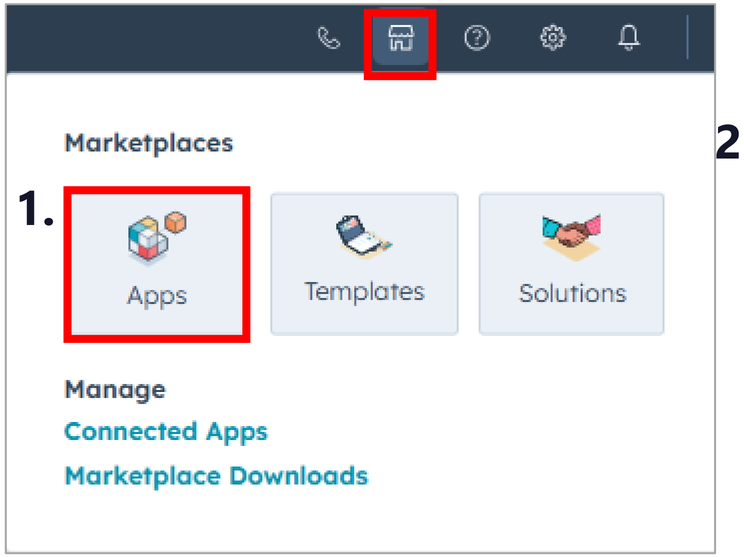
Pay attention to the following fields when configuring your meeting preferences

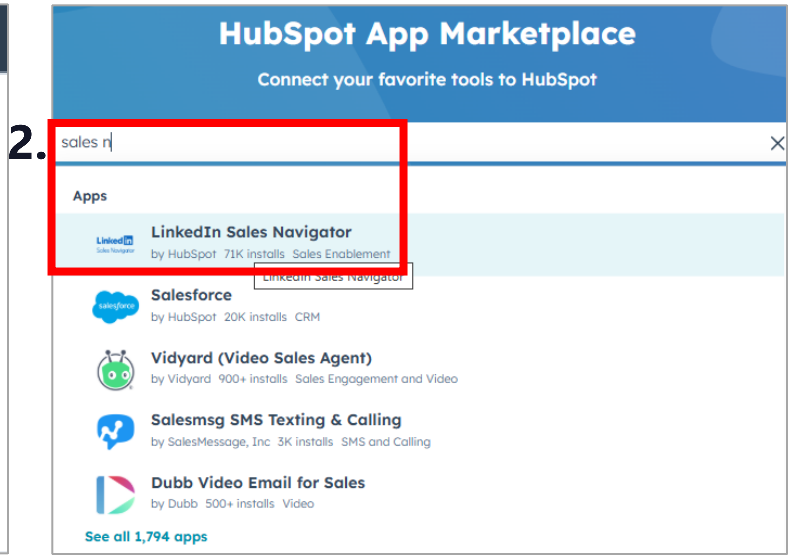
- Scheduling page link title
- Meeting duration options (how long the meeting will last)
- Available window for when the meeting can be scheduled (the system will detect if you are free during this window)
- Enable working hours
- Under form:
  - Allow guests
  - Disable data privacy and consent checkbox (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"

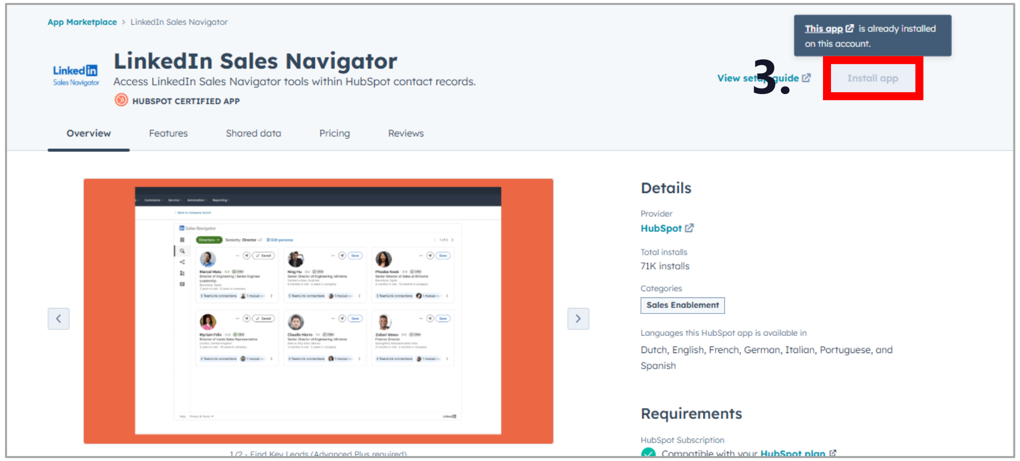


Installing the Sales Navigator App
(Only available to users with a sales license & Sales Navigator license)

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







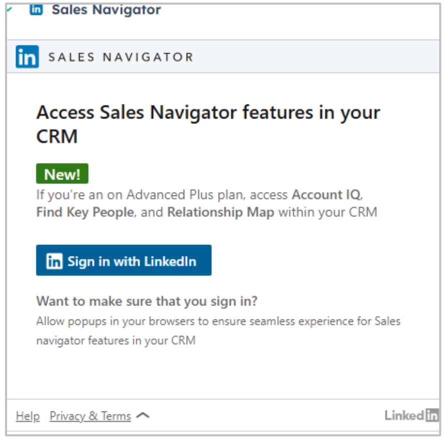
Activating LinkedIn Sales Navigator
(Only available to users with a sales license & Sales Navigator license)

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.

1.



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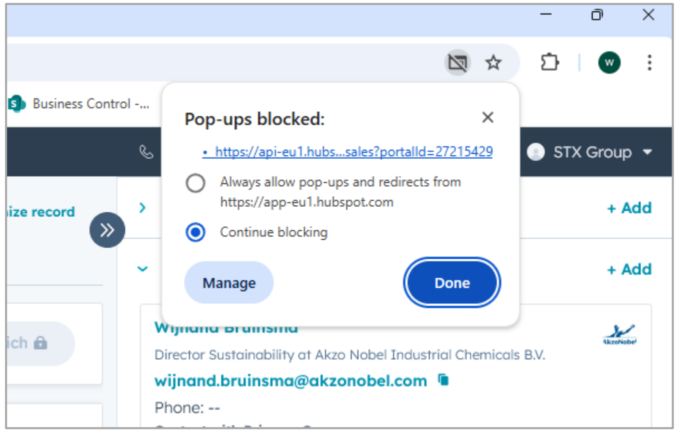

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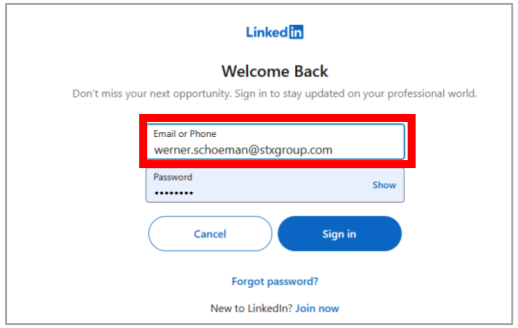

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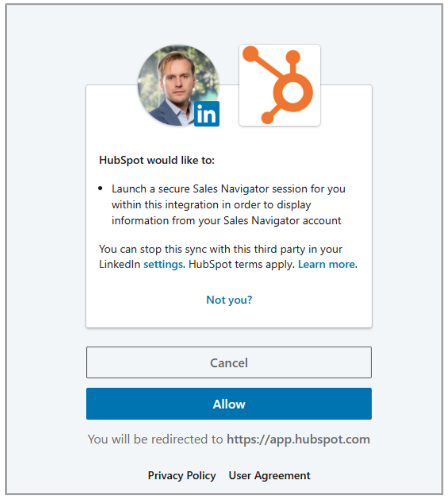
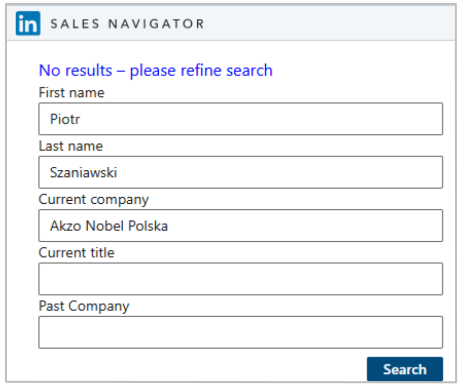


Using LinkedIn Sales Navigator

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.



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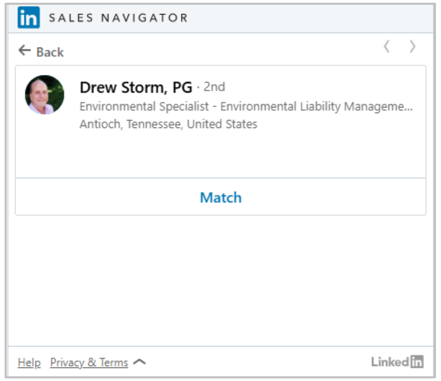

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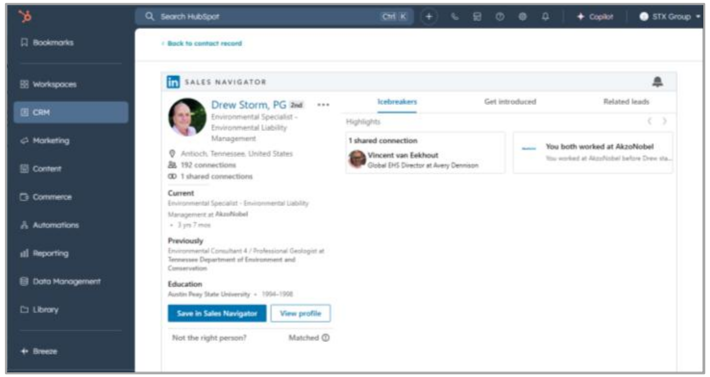

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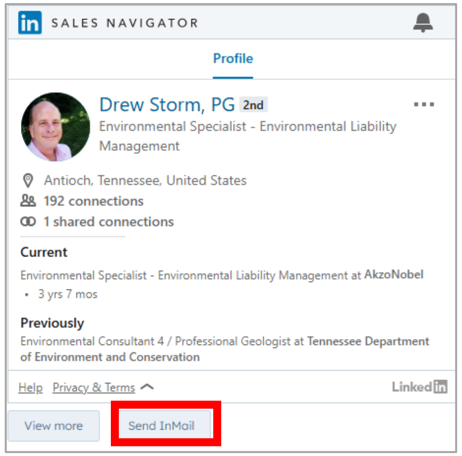
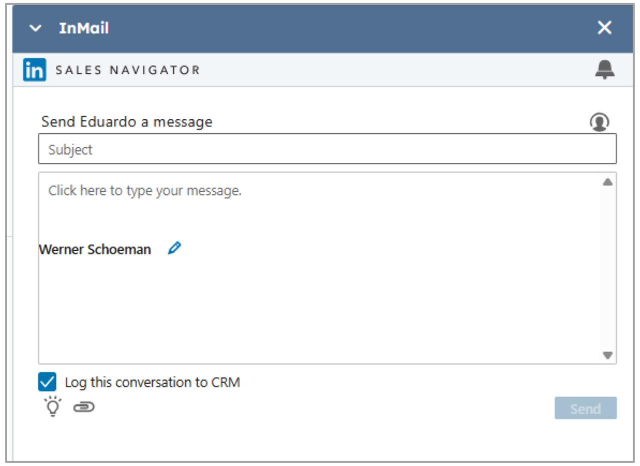
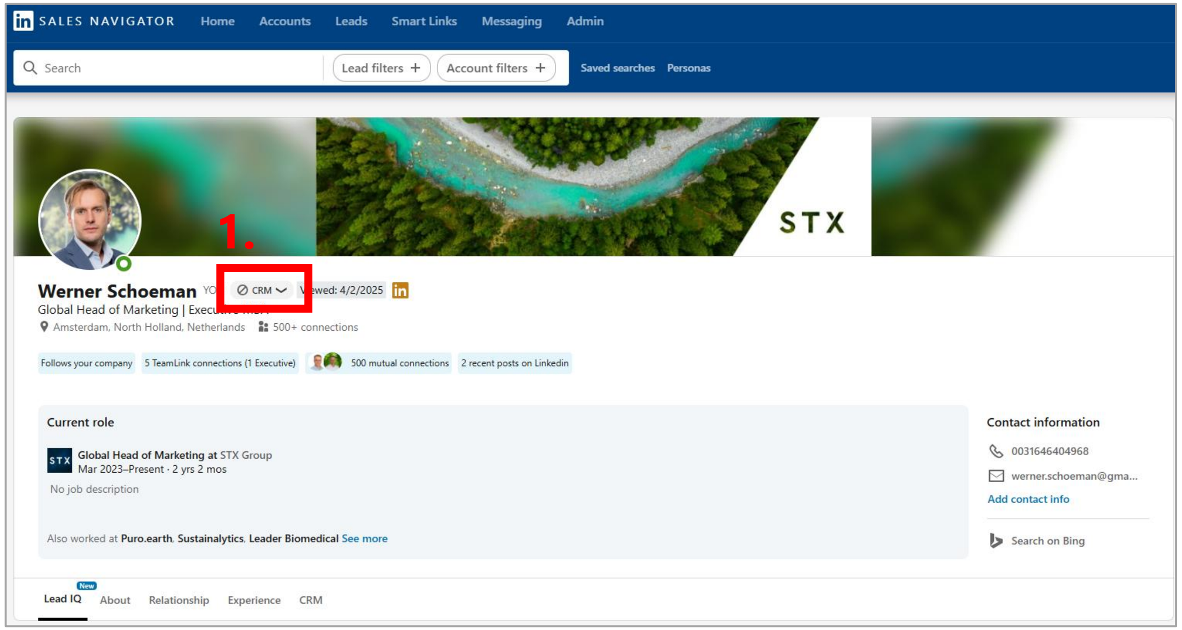




Create or match CRM contact records directly in Sales Navigator

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



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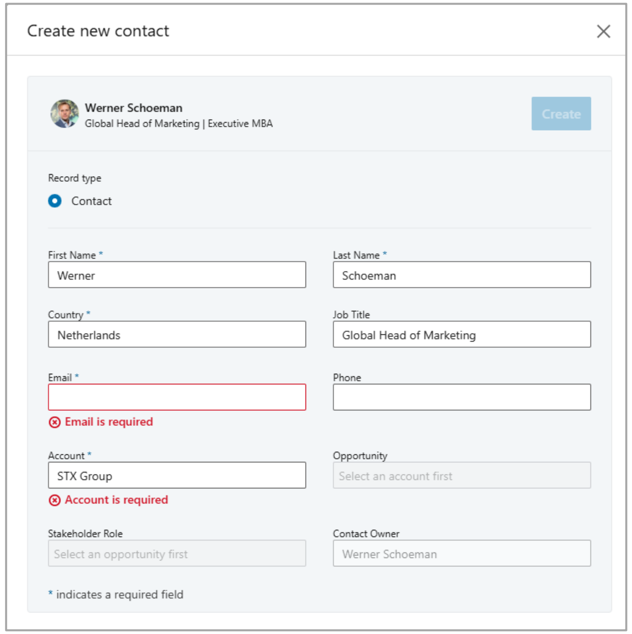

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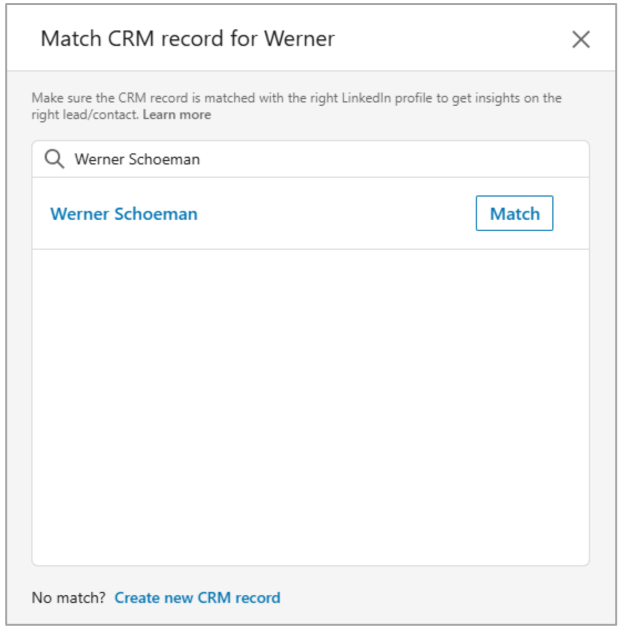
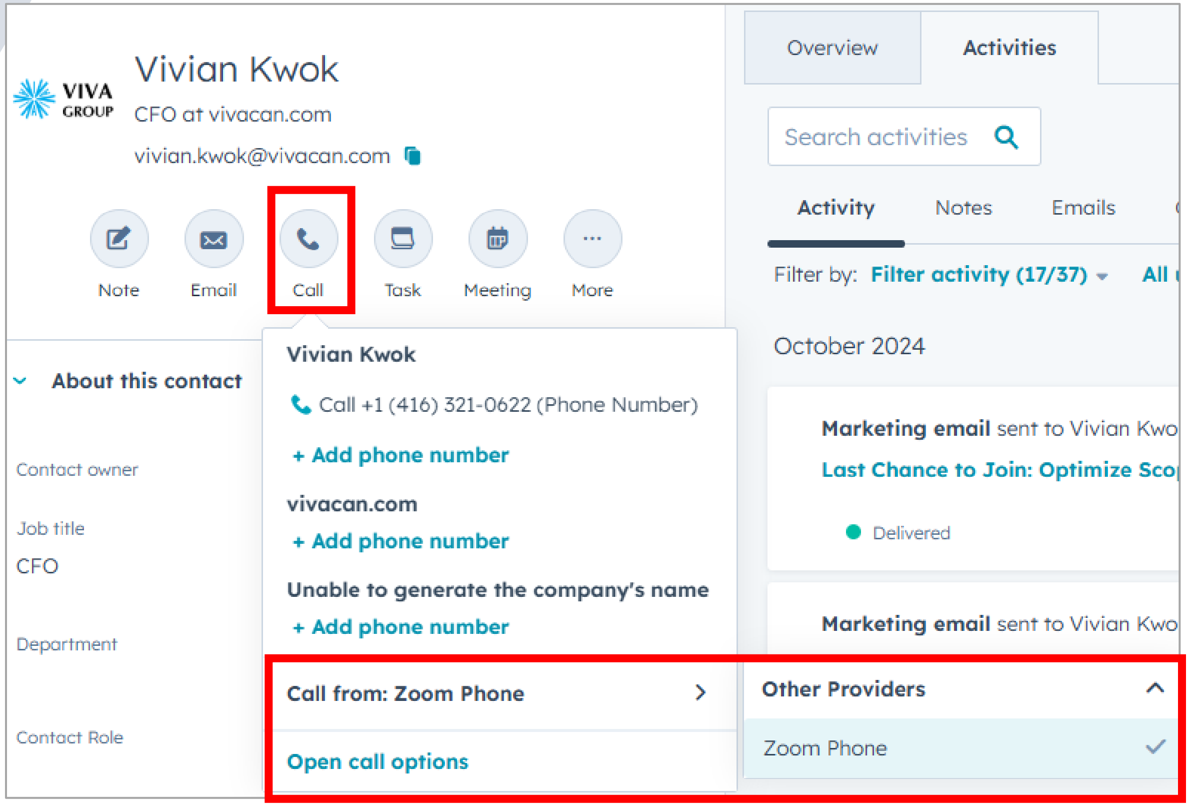
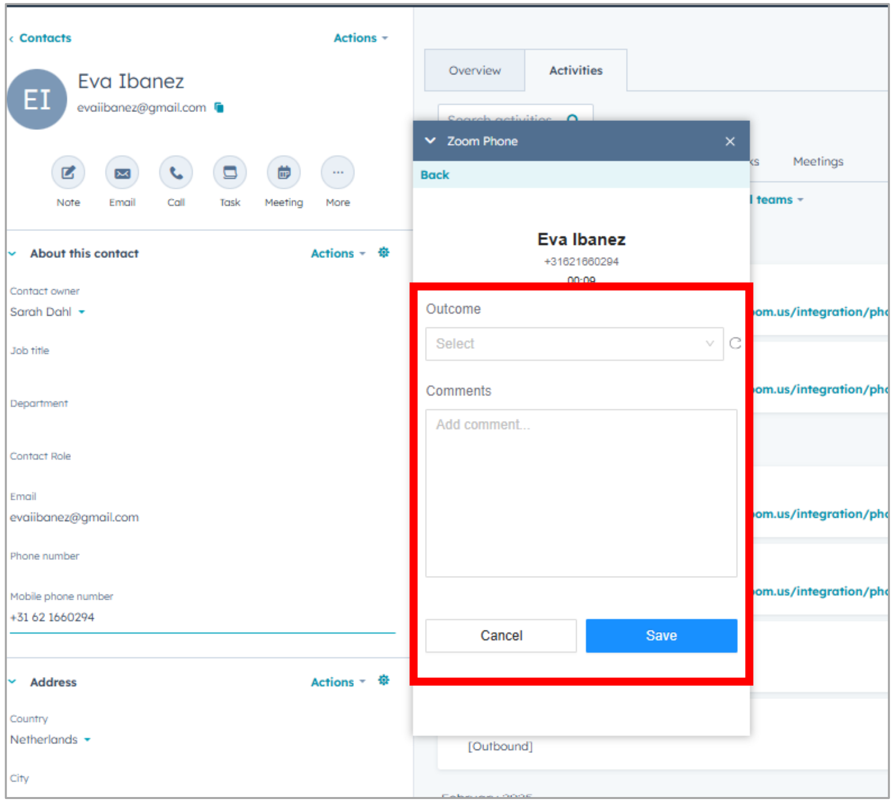


Activating Zoom Phone

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.

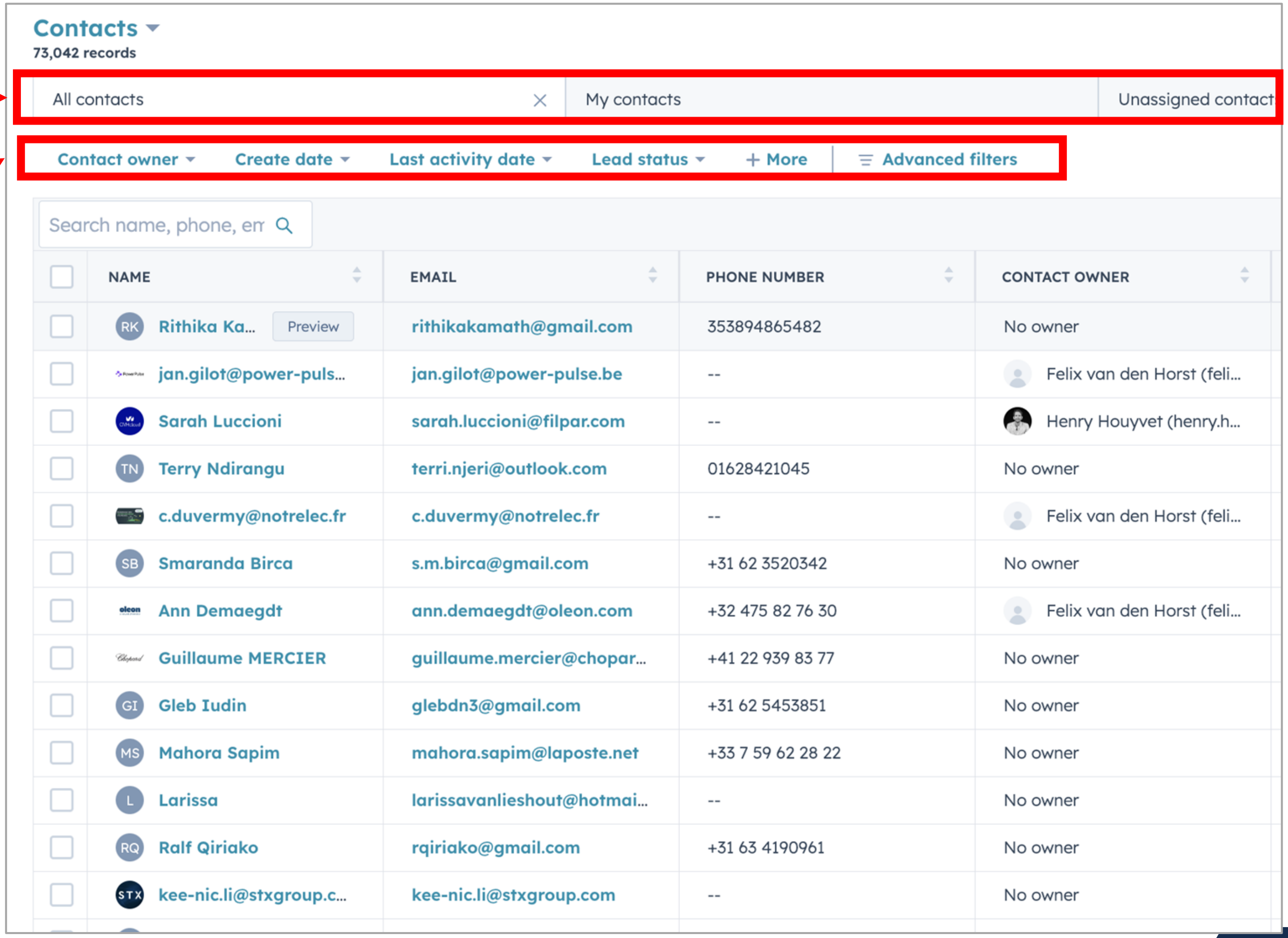
Navigating Hubspot (views & filters)

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.



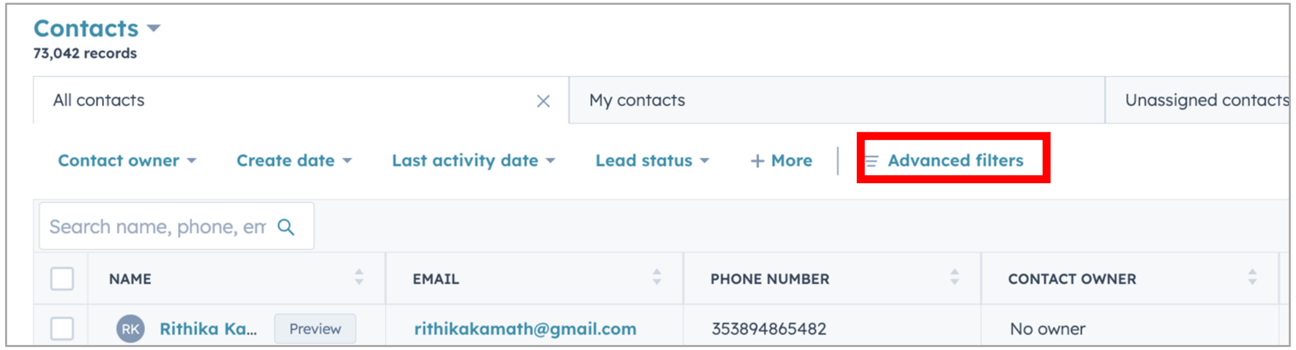
Select filter criteria

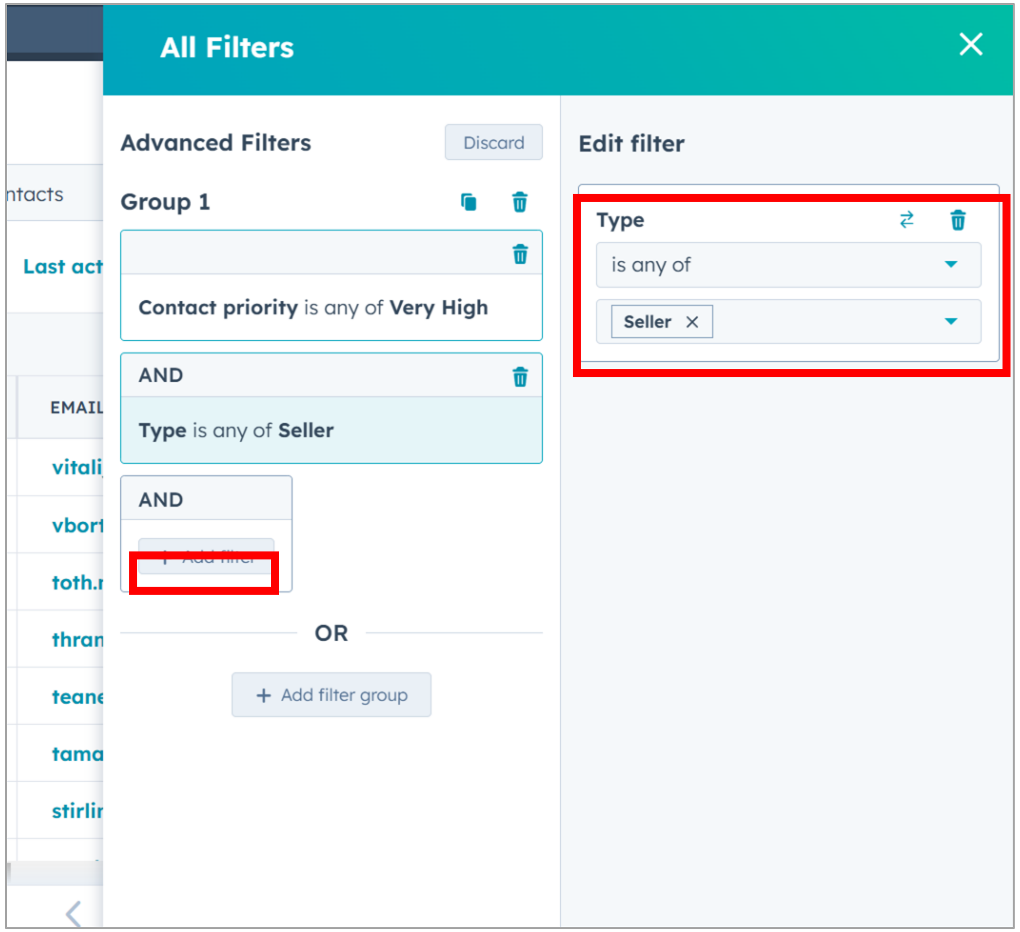
Customize quick filters

Using advanced filters

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

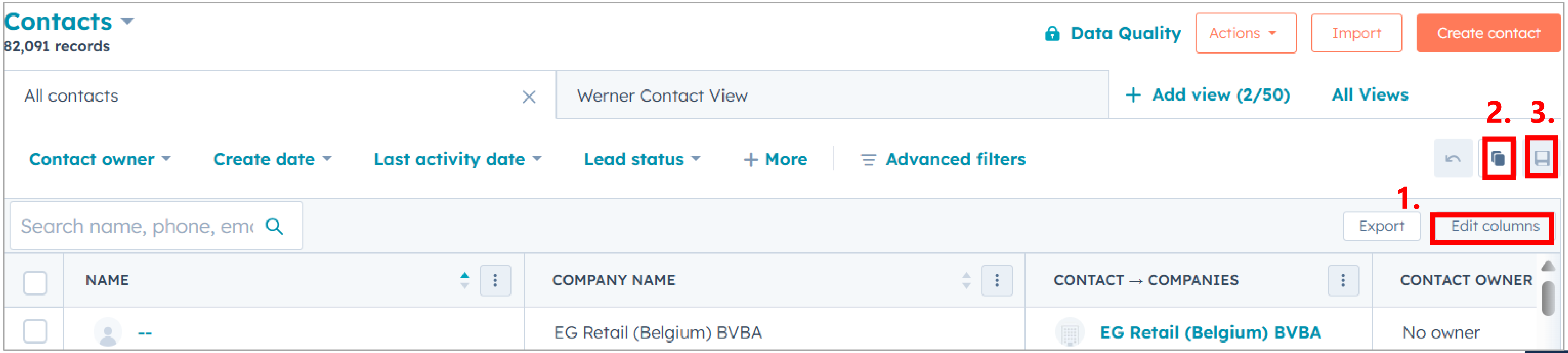
Select filter criteria



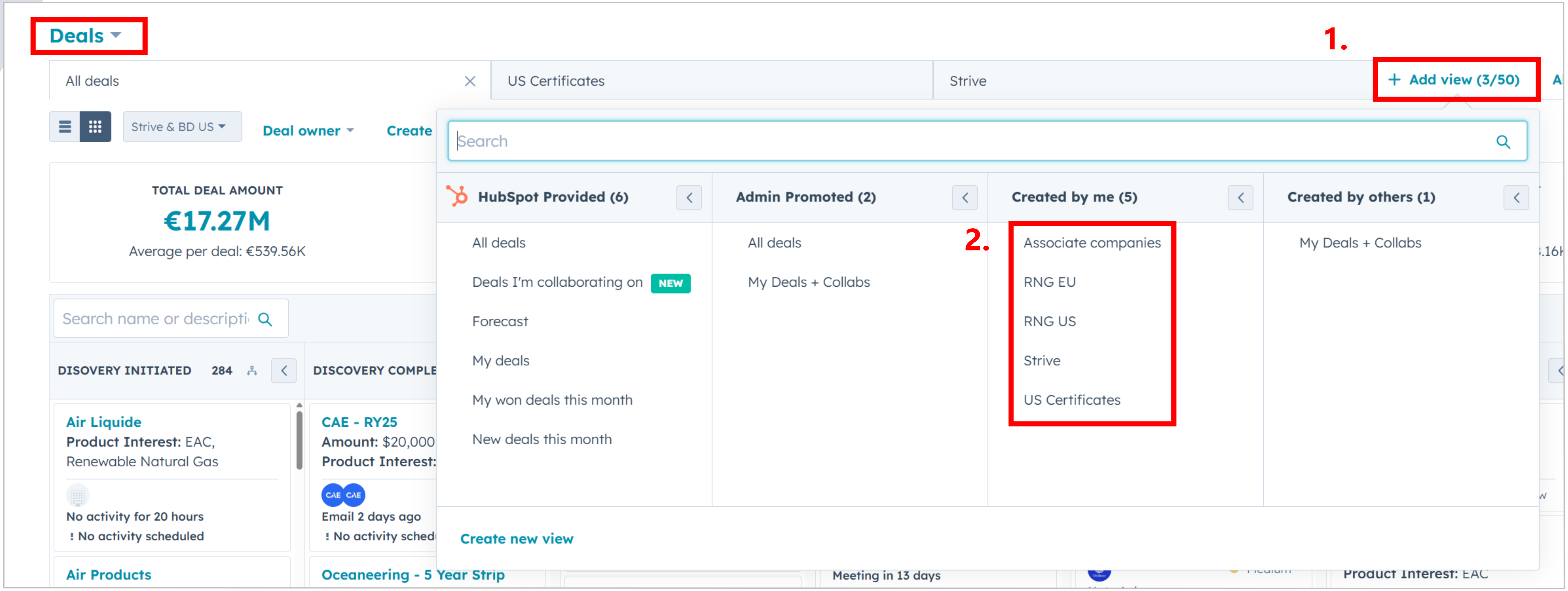


Tailor your contact, company and deal views

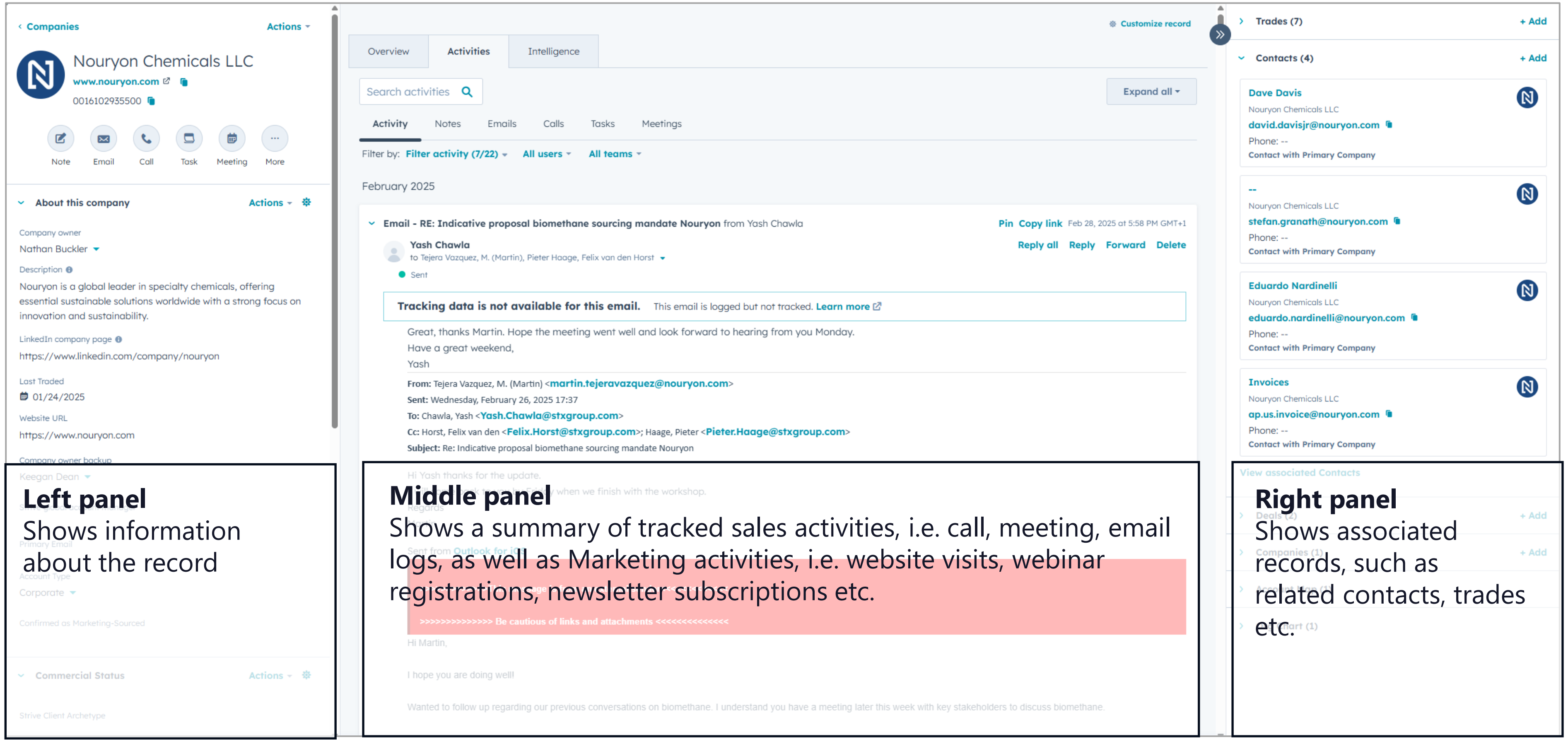
1. Edit the columns you want to see
2. Make a copy of the newly created view
3. Save the new view



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



Company, contact and deal records follow the same design logic

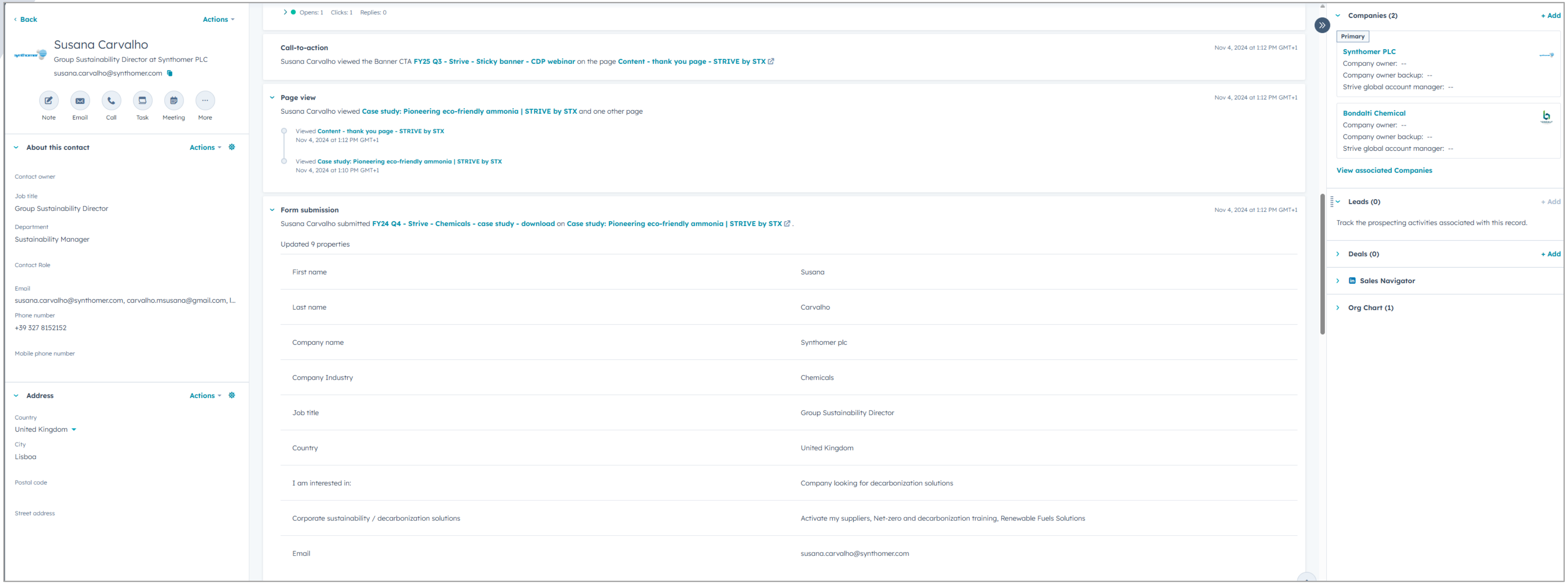


Left panel
Shows information about the record

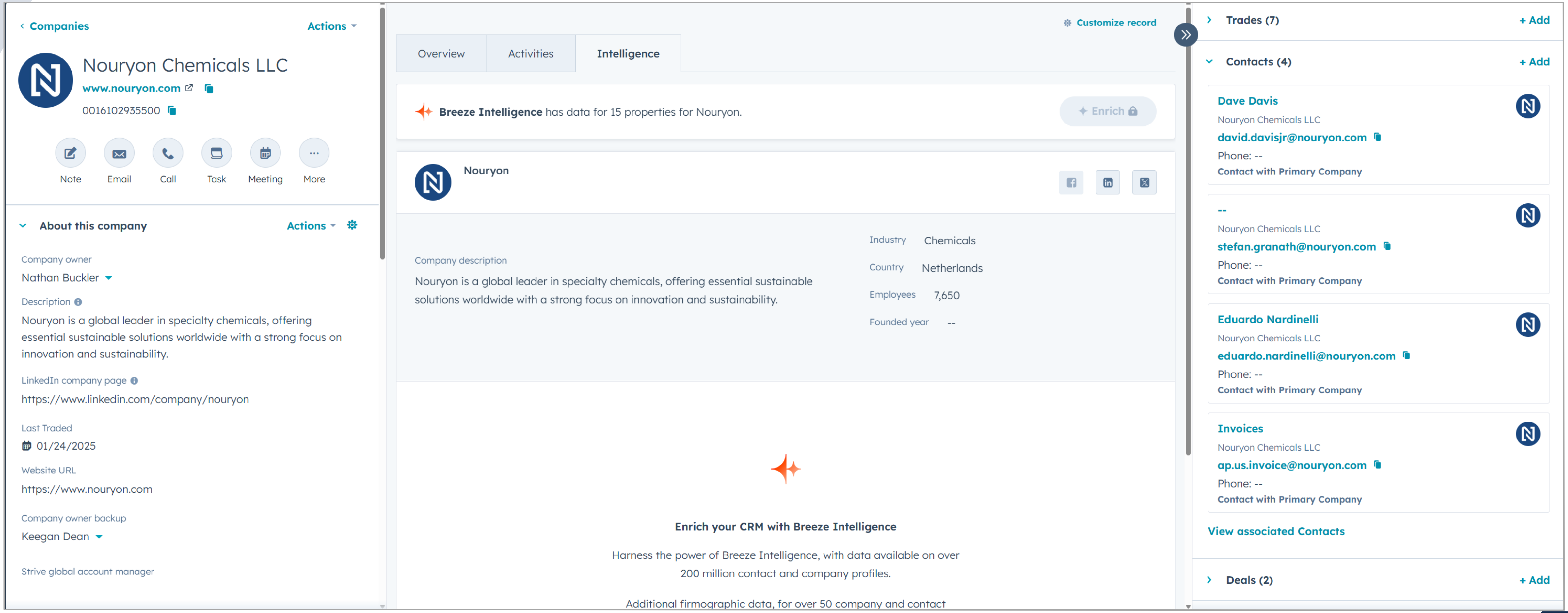
Middle panel
Shows a summary of tracked sales activities, i.e. call, meeting, email logs, as well as Marketing activities, i.e. website visits, webinar registrations, newsletter subscriptions etc.

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

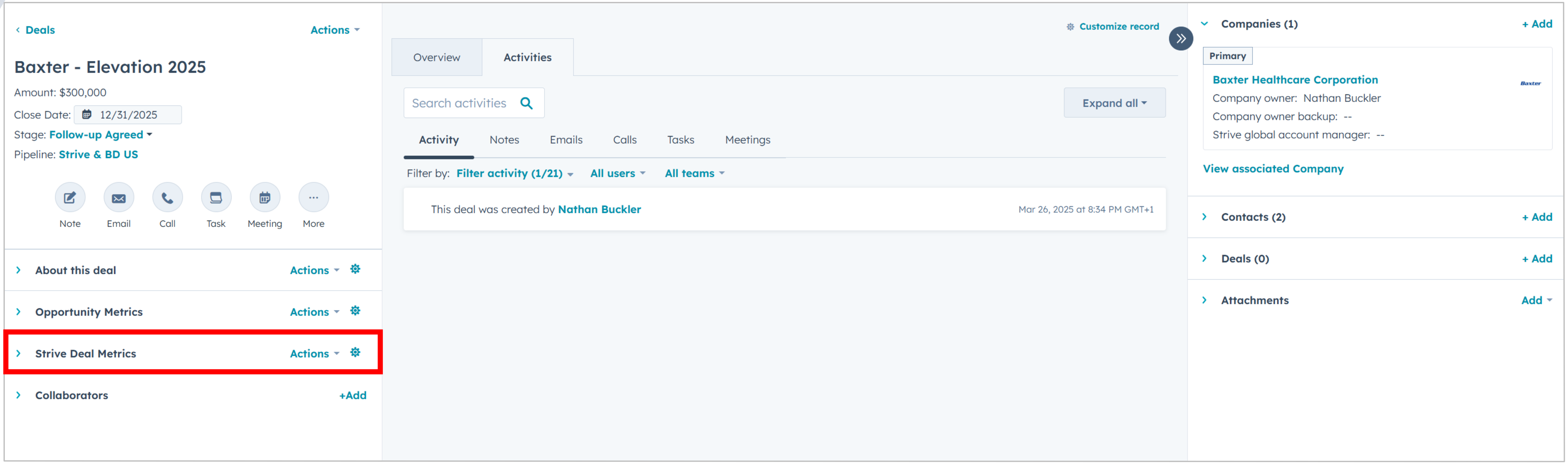
With HubSpot, cookied marketing actions—like page views, form submissions, newsletters and downloads—are now also visible



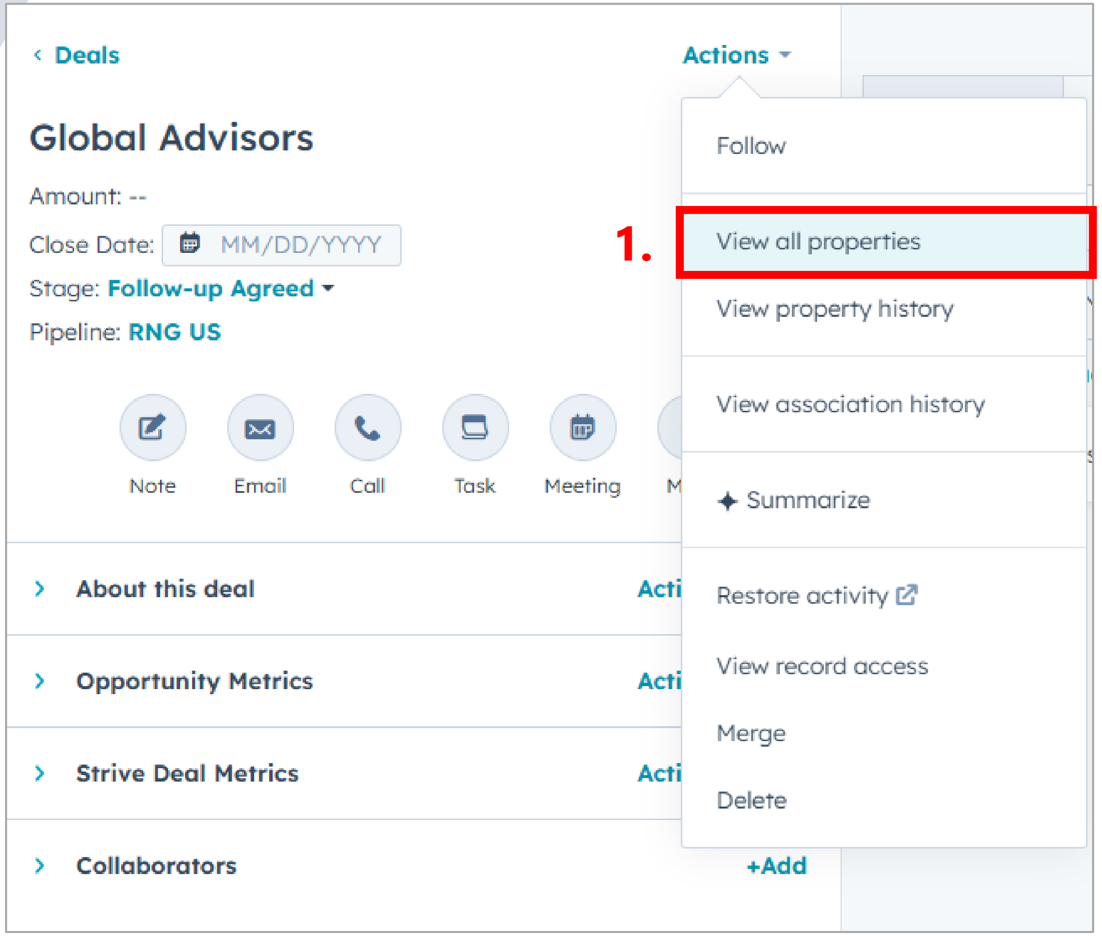
Company enrichment - industry



Deal views are tailored to each team

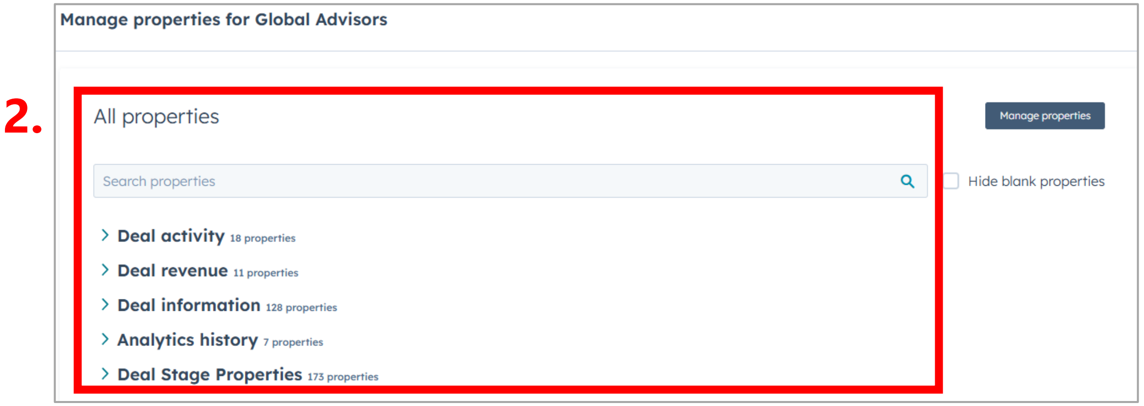


Viewing all record properties (contact, company & deals)

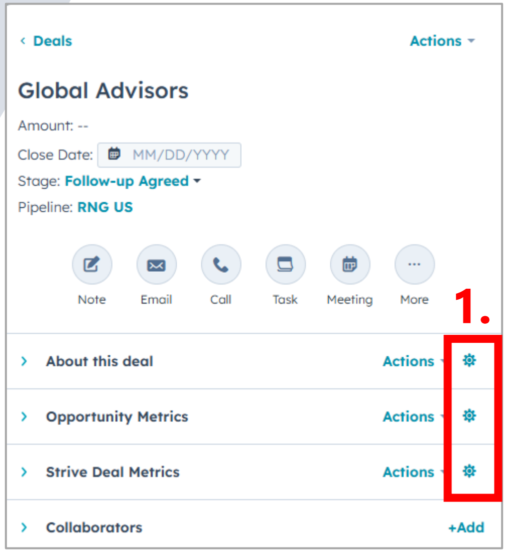


1. To view all record properties, click on actions > "View all properties".
2. Search for the relevant property by property category or using the search bar. You can edit properties directly from this view.

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.

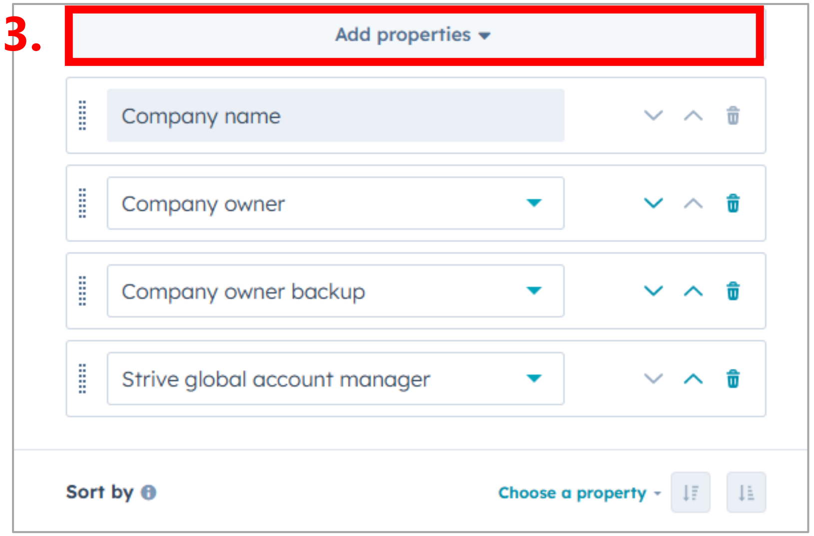


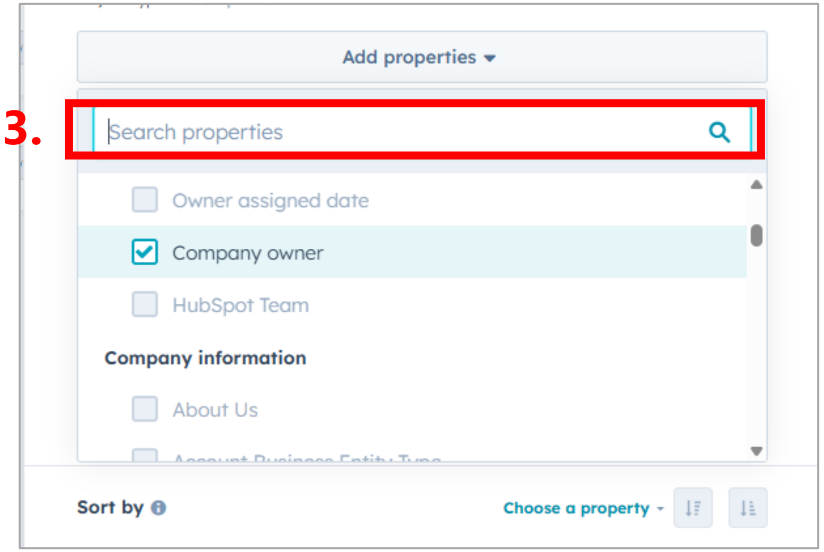
Customizing record views (contact, company & deals)



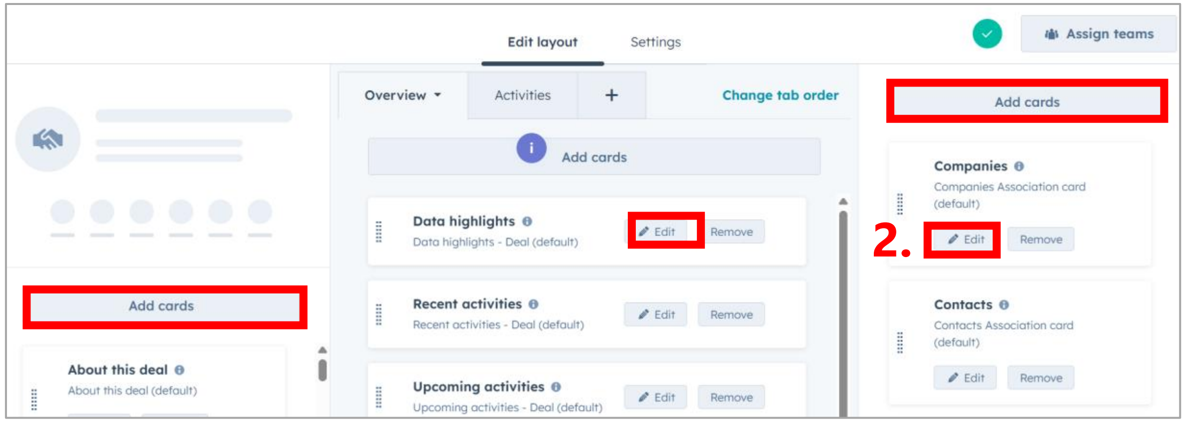
1. All record views (contact, company and deals) are fully customizable by selecting the gear icon on the record you want to customize
2. You can add new "cards" with different properties or edit the properties or on existing cards
3. To add property, select edit > add property and add the property you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

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



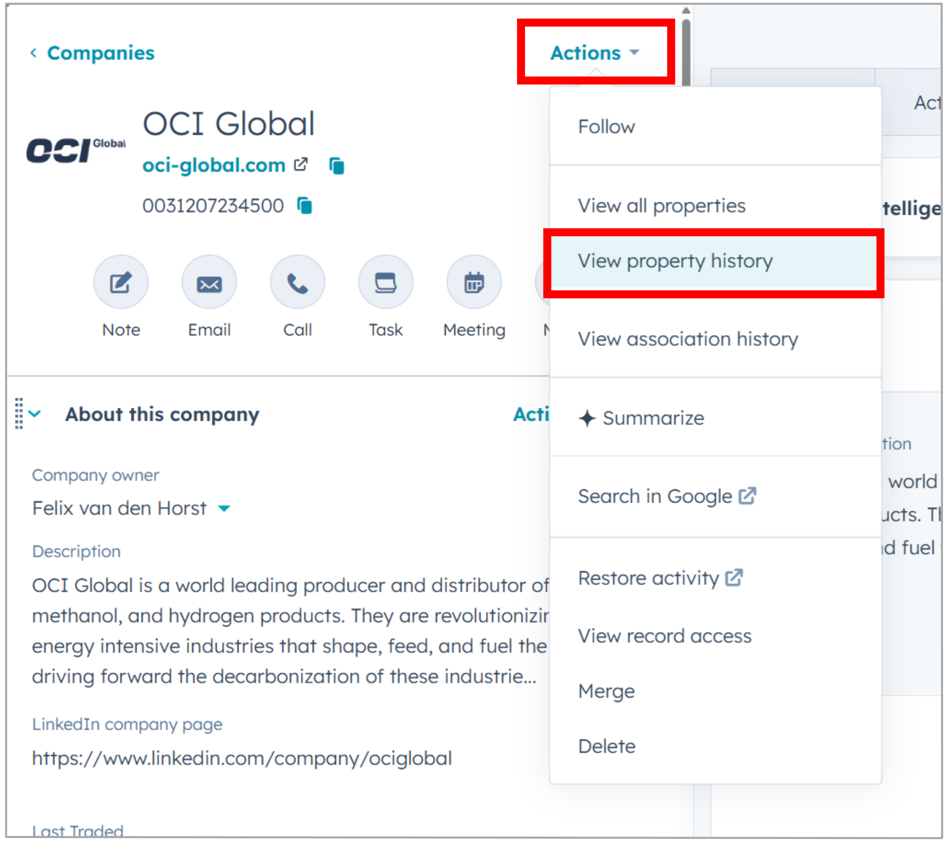


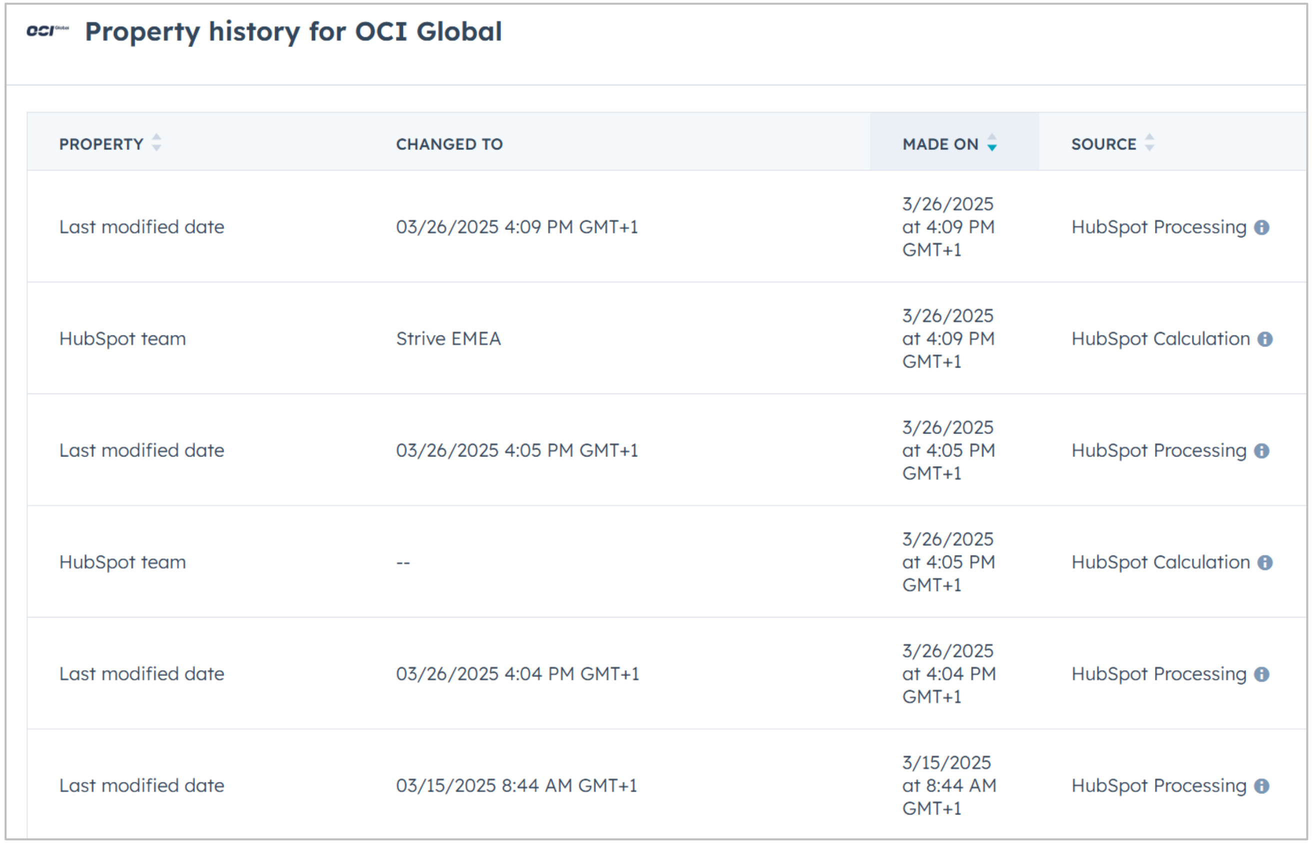
2.



Data hygiene

Data Hygiene – record history





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

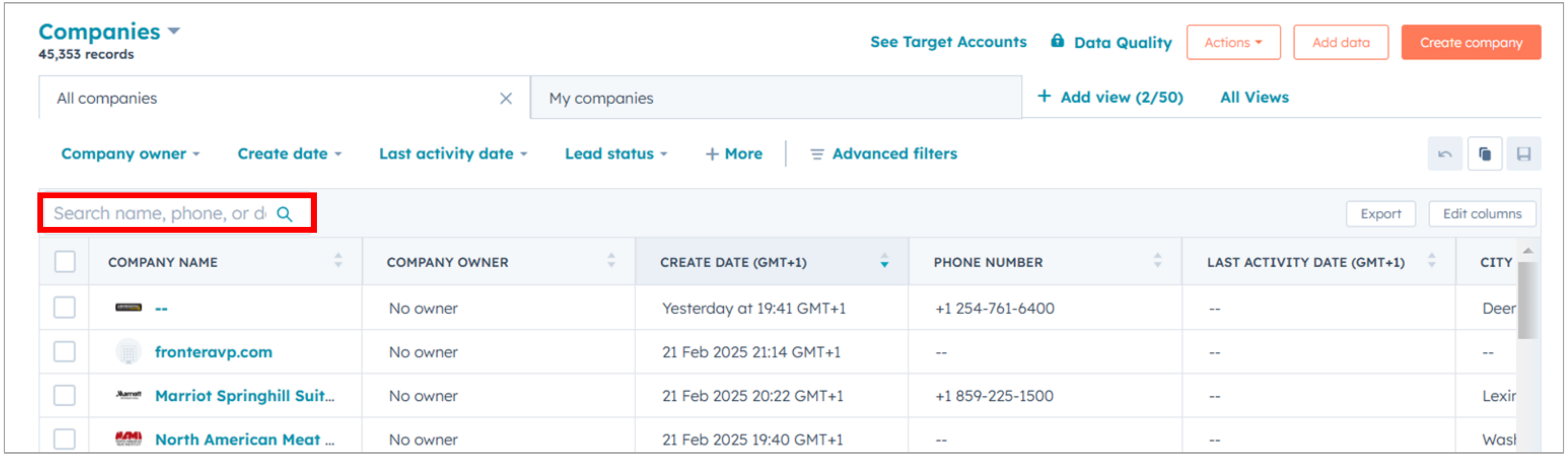
UUID + No UniqueID = merged records in DataHive

nouryon

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

Creating new records

First check whether the records already exists or not

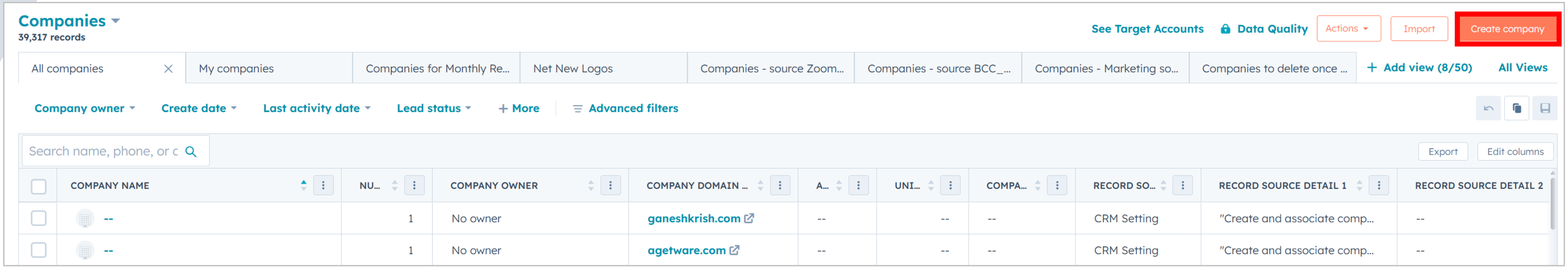


Make sure to first create the company before creating new contacts

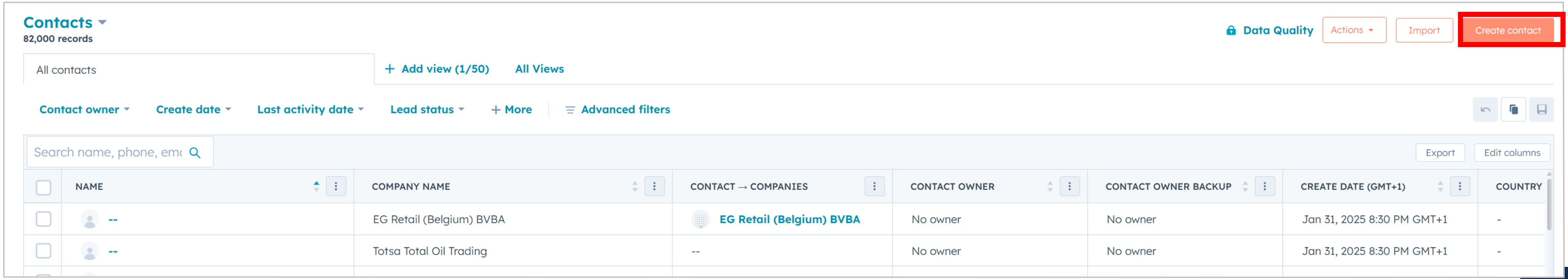
Contact demo

Company demo

First create the company



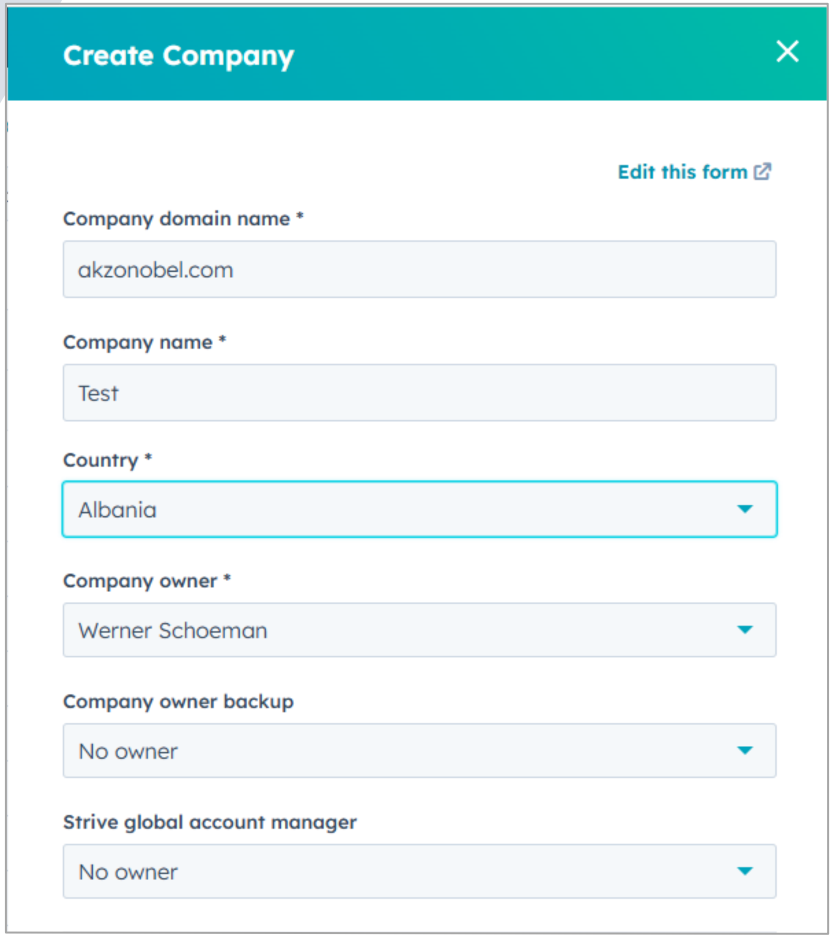
Then the contact, since you always need to associated a contact with a company

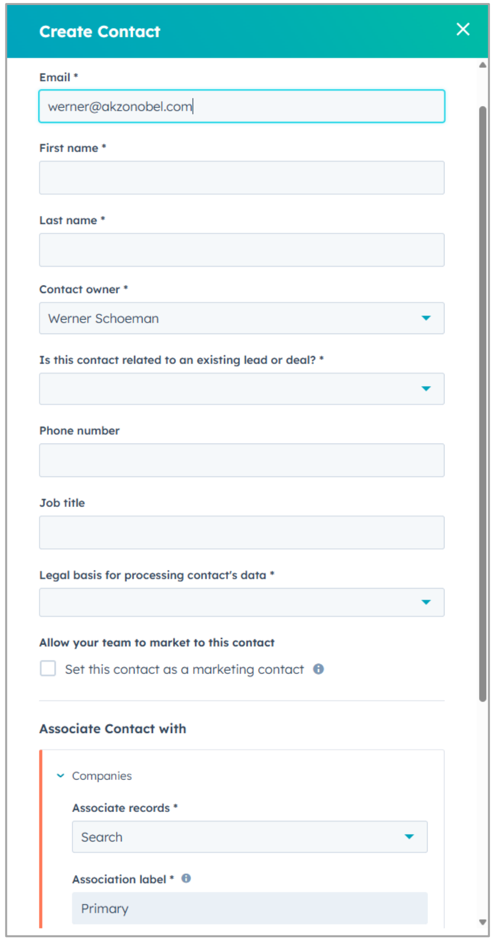


Creating records through the Hubspot interface

Contact demo

Company demo





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.

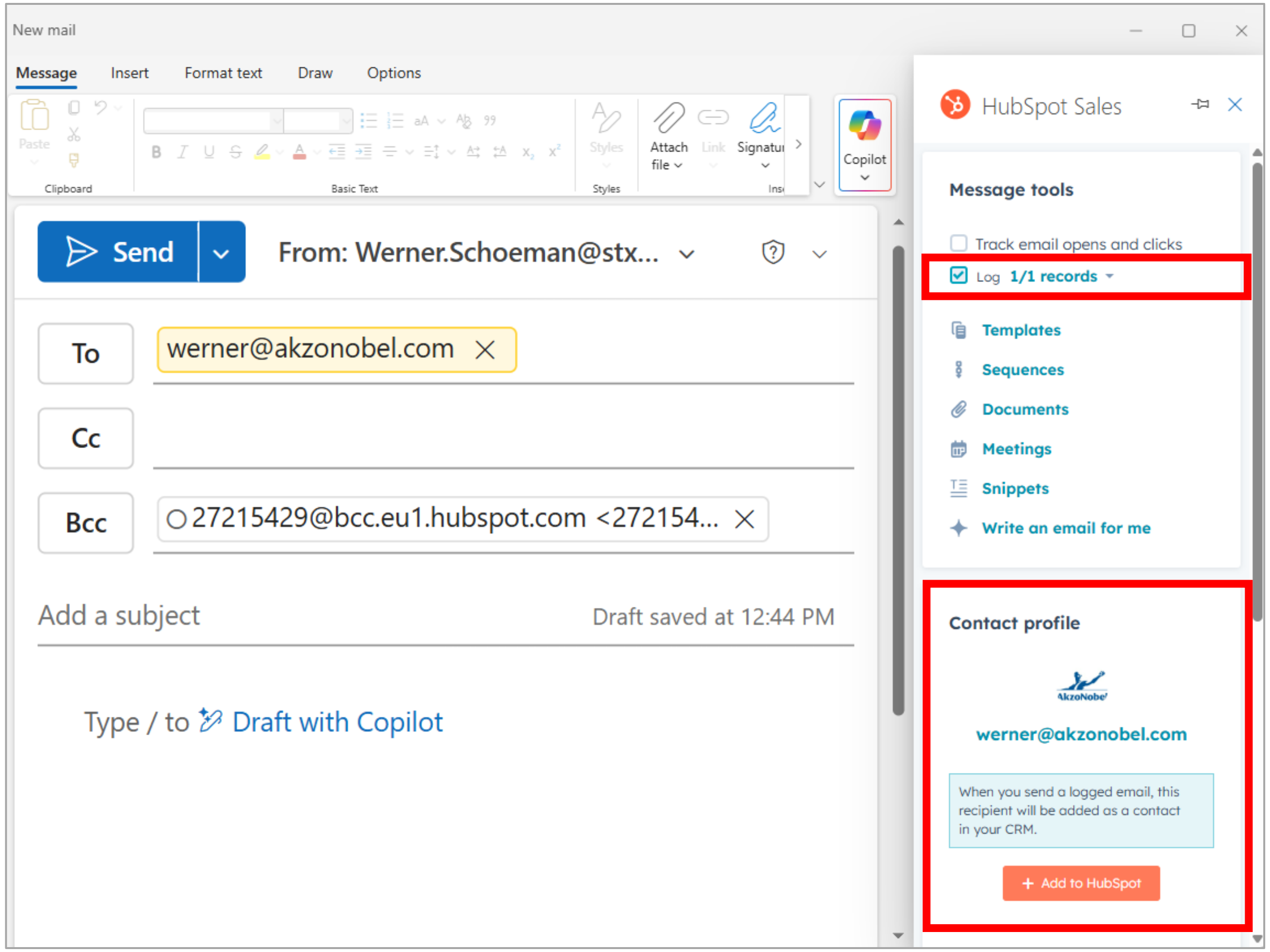
Automated ways of creating new contacts

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

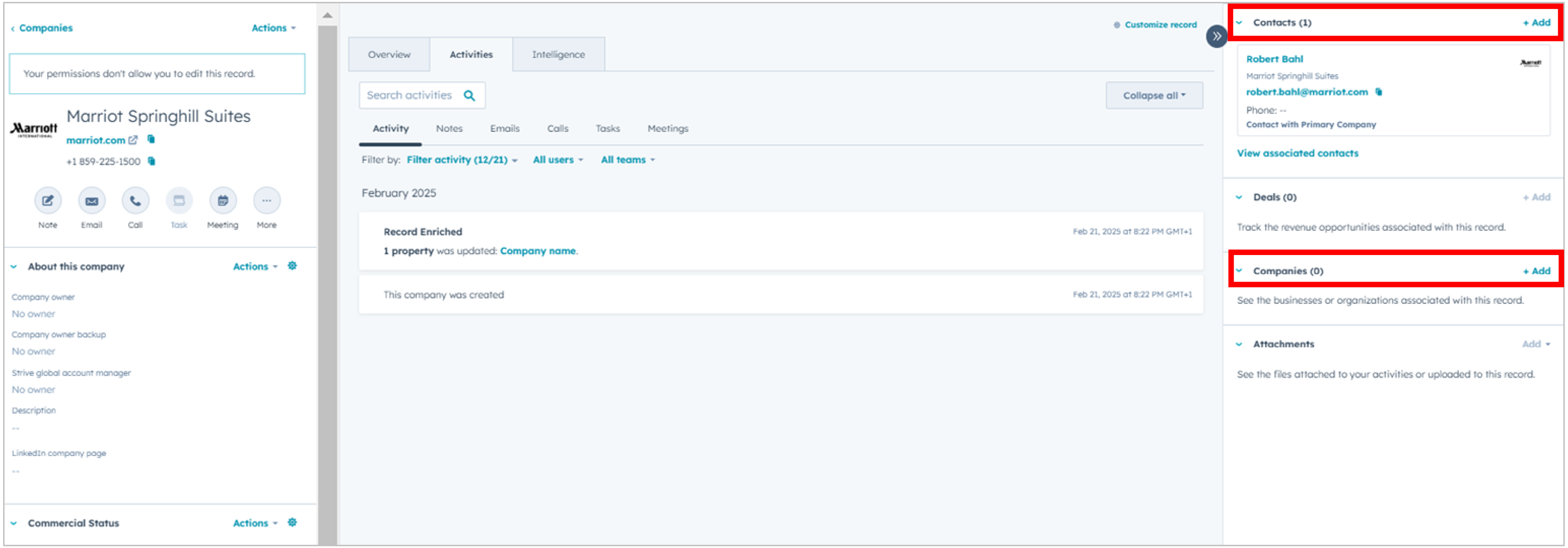
1. Business card scanner
2. Excel leads list imports (ask Marketing for help!)
3. From Marketing campaigns
4. LinkedIn Sales Navigator

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.



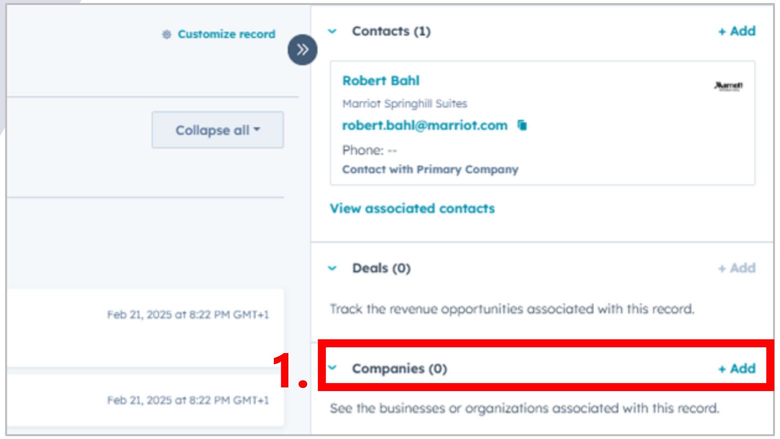
Account & contact mapping

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



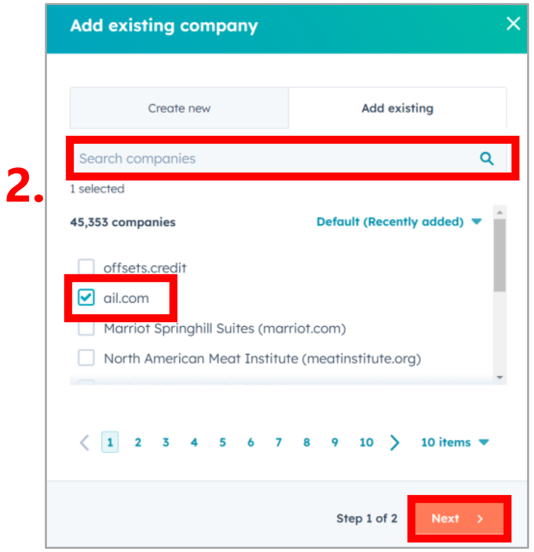
Creating relationships between company records (parent > daughter > assets)

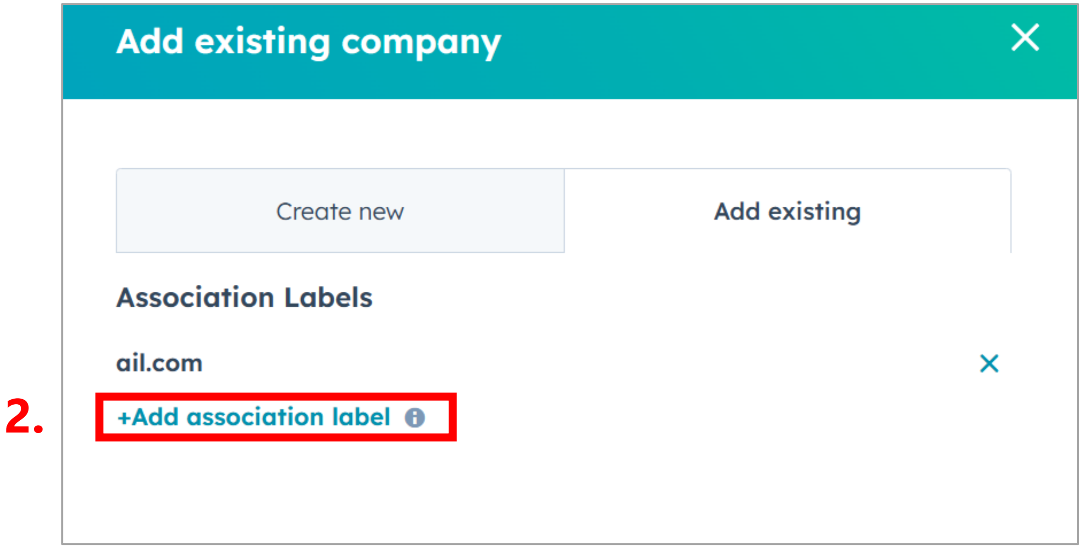
Read more



On the company record:

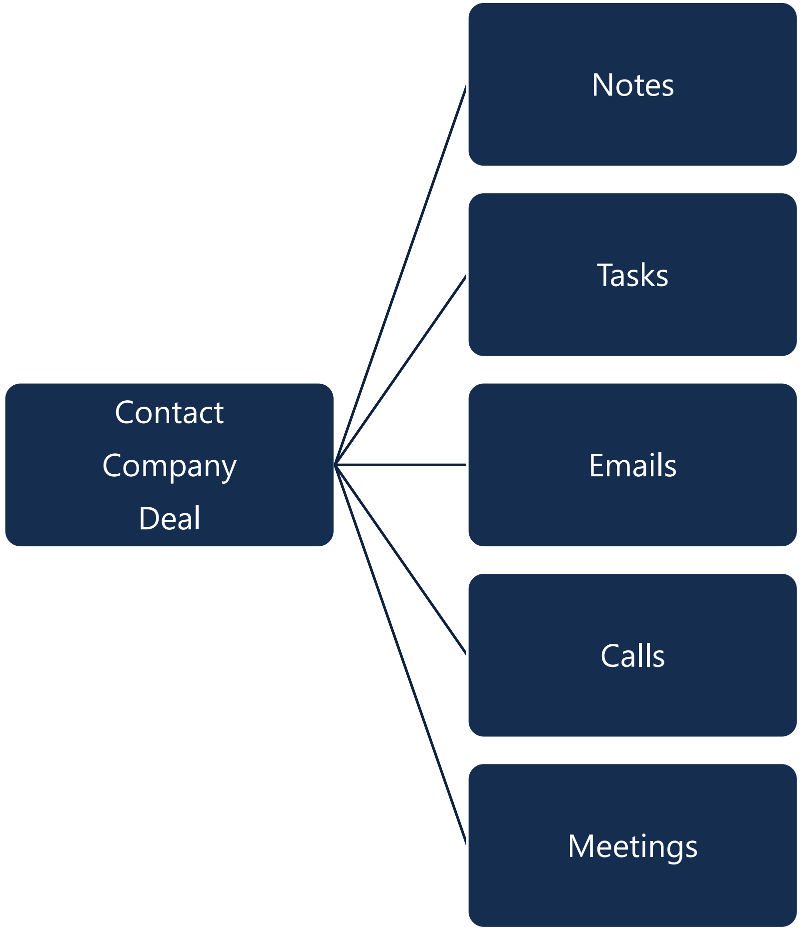
1. Select "+Add"
2. Search for the company and select "next"
3. Choose the correct association label:
   - **Parent:** overarching entity or group, e.g. Tesla or Unilever
   - **Child:** Regional legal entity, e.g. Tesla France or Dove (a sub-brand of Unilever)
   - **Asset:** The assets associated with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





Tracking Marketing & Sales Activities

Marketing & Sales activity tracking and logging



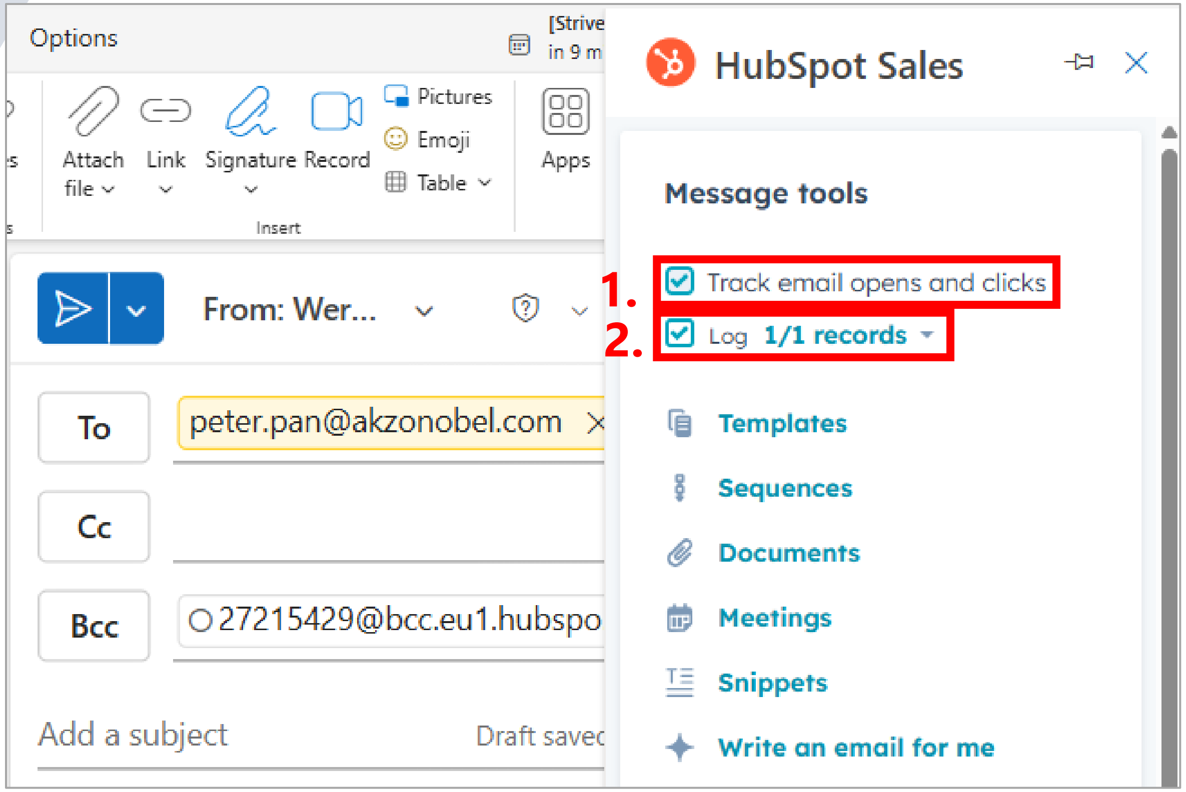
Activities consists of tracked actions in Hubspot:

- **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.

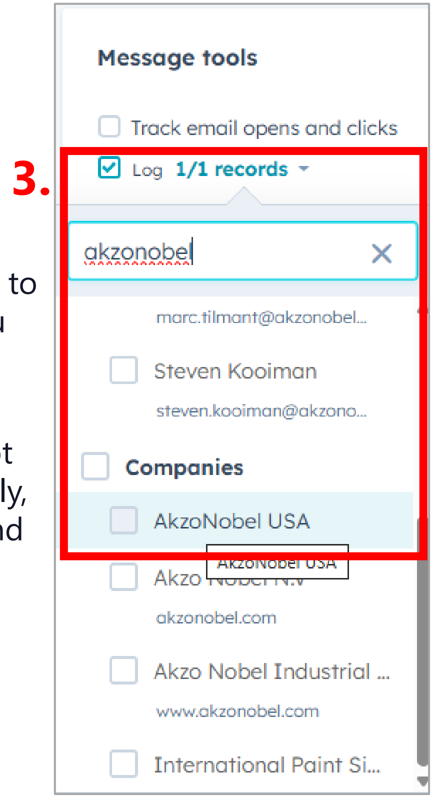
Marketing activities are tracked automatically. Sales activities are tracked under these conditions:

- 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

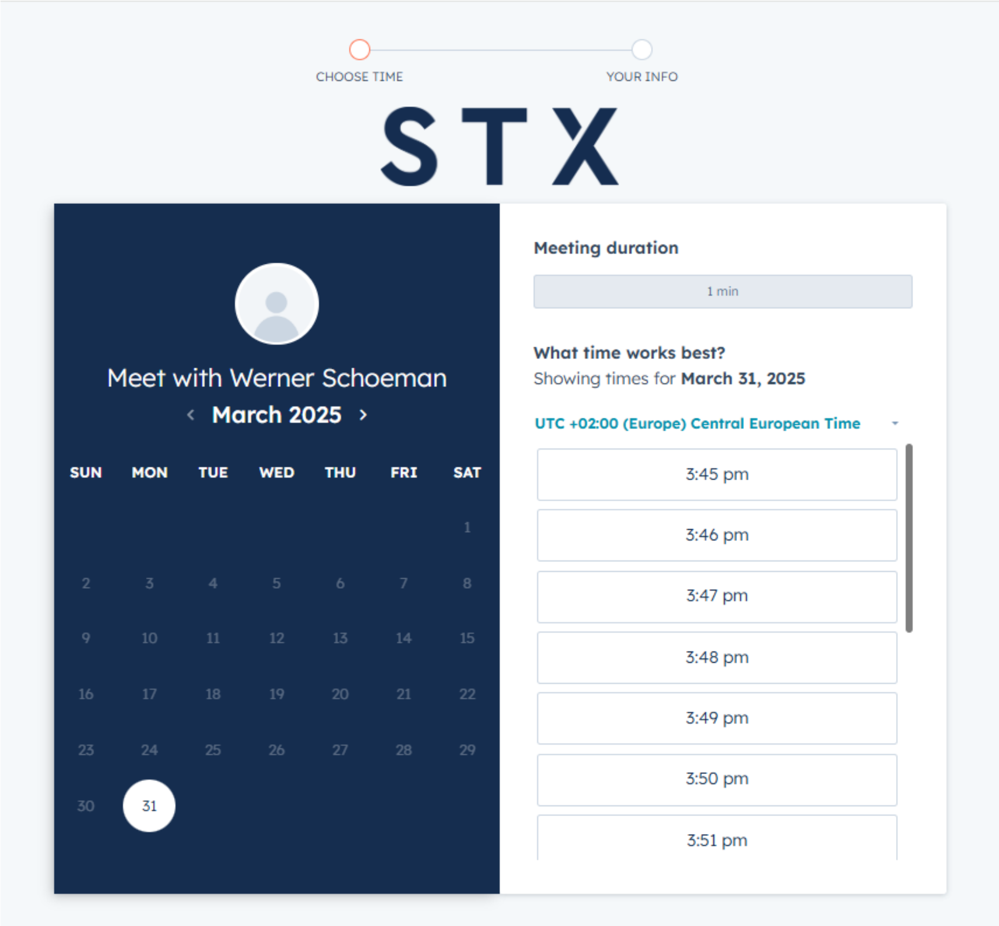
Automatically track and log email with the Hubspot plugin



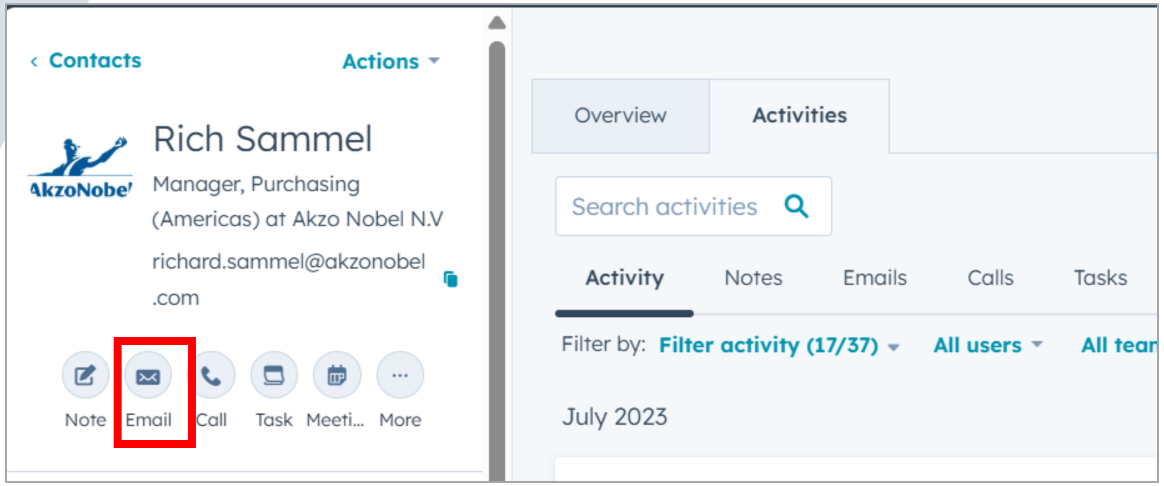
1. Track email opens and clicks
2. Log emails in Hubspot to make them visible to the rest of the team (be mindful of what you log!)
3. You can choose to log the email to related contact, company and deal records. Hubspot should identify relevant records automatically, but if you don't see them, you can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



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



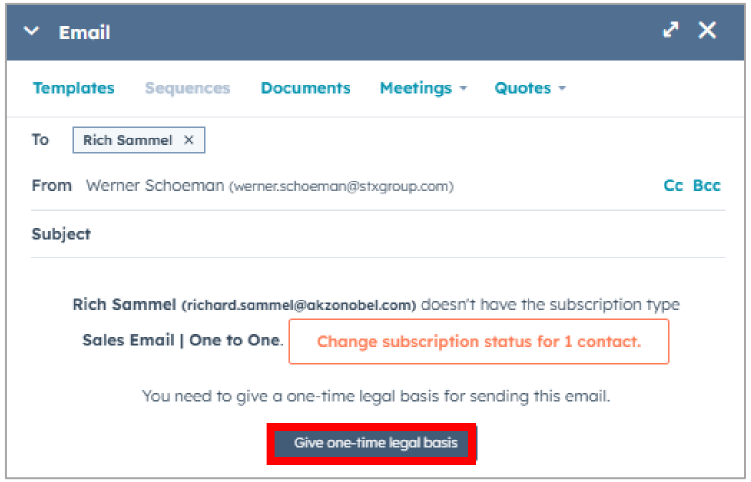
Emails and meetings executed through Hubspot will also be tracked

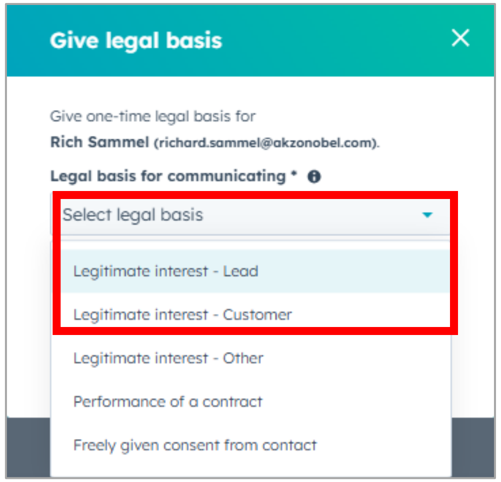


To email a contact, navigate to the envelope icon on the top left of the contact record.

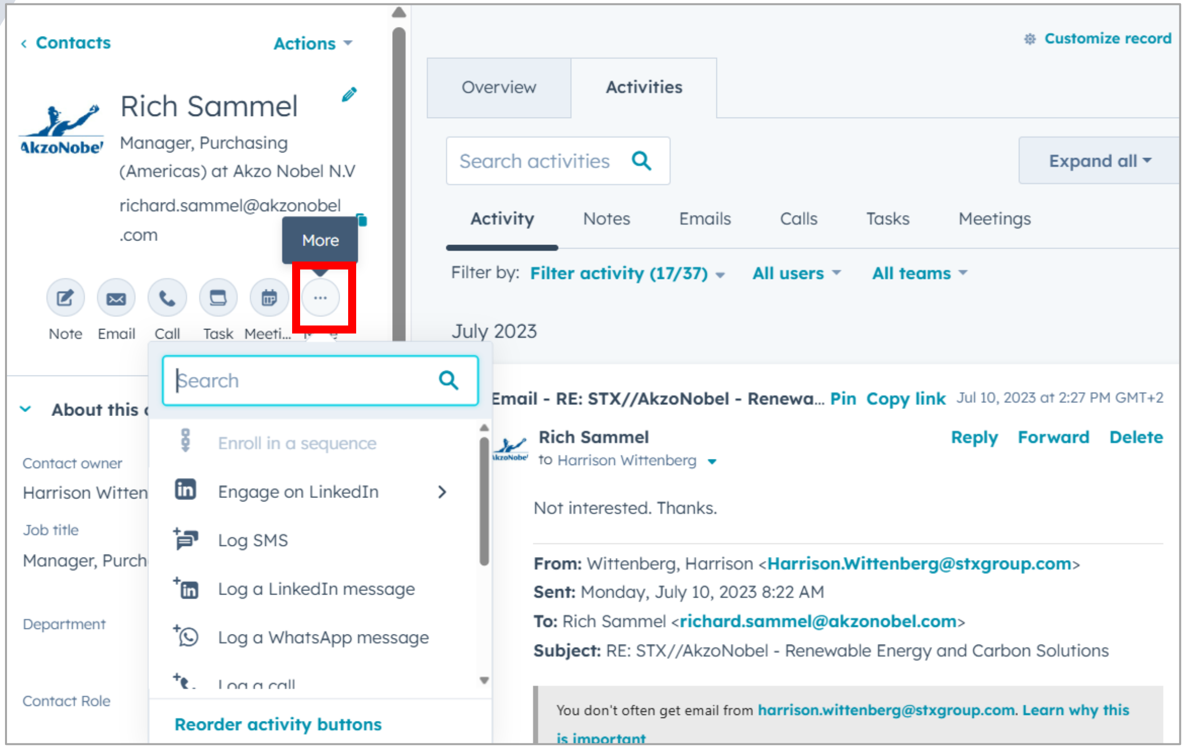
The first time you email someone through Hubspot, you need to specify the bases for consent, which is either:

- Legitimate interest – Lead
- Legitimate interest – Customer





It is also possible to manually create or log activities



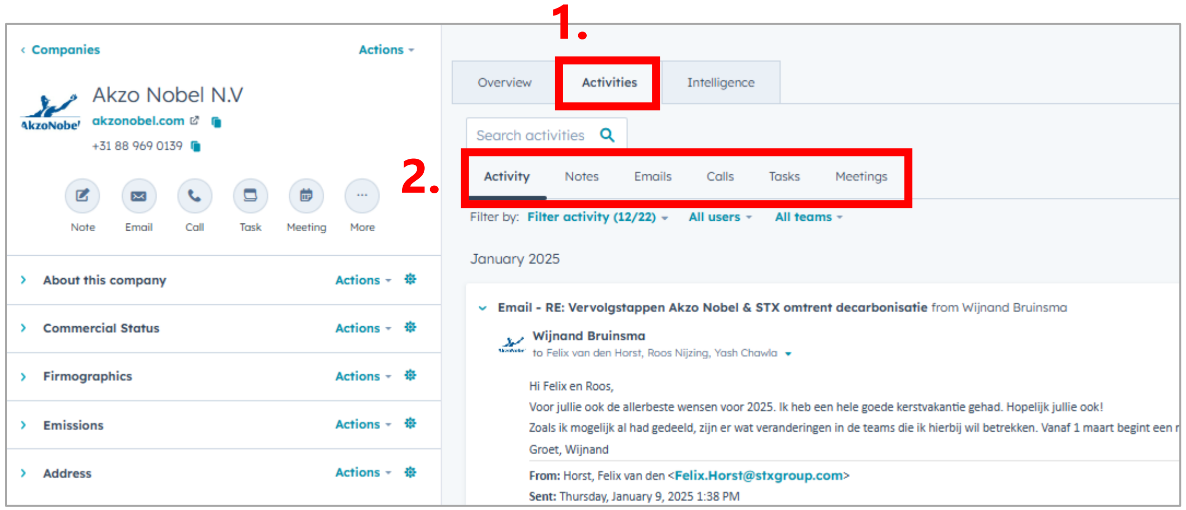
Activities can be created or logged for contact, company and deal records:

- 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

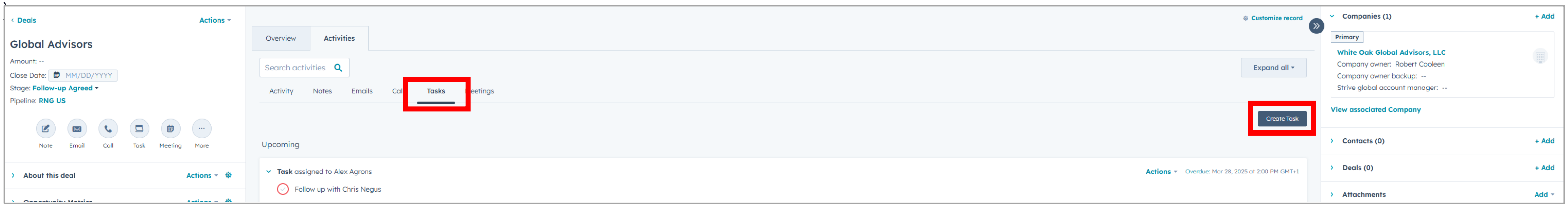
Colleagues can be tagged in notes and they can be pinned to the top

Productivity tools: Tasks

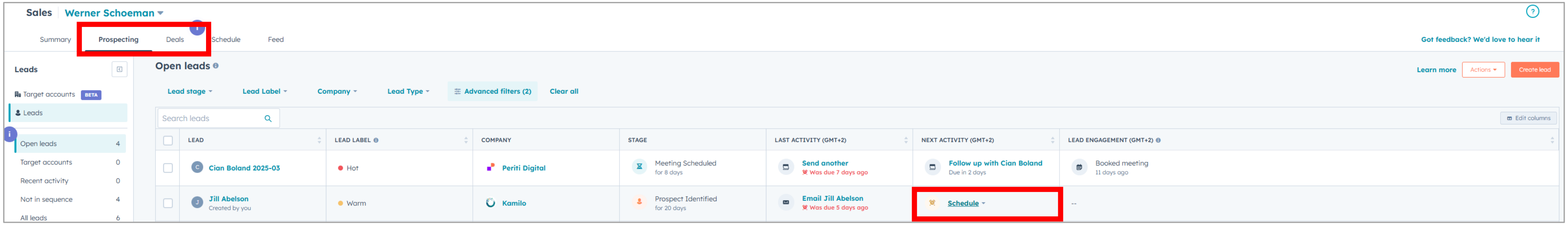
Where to create new tasks

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

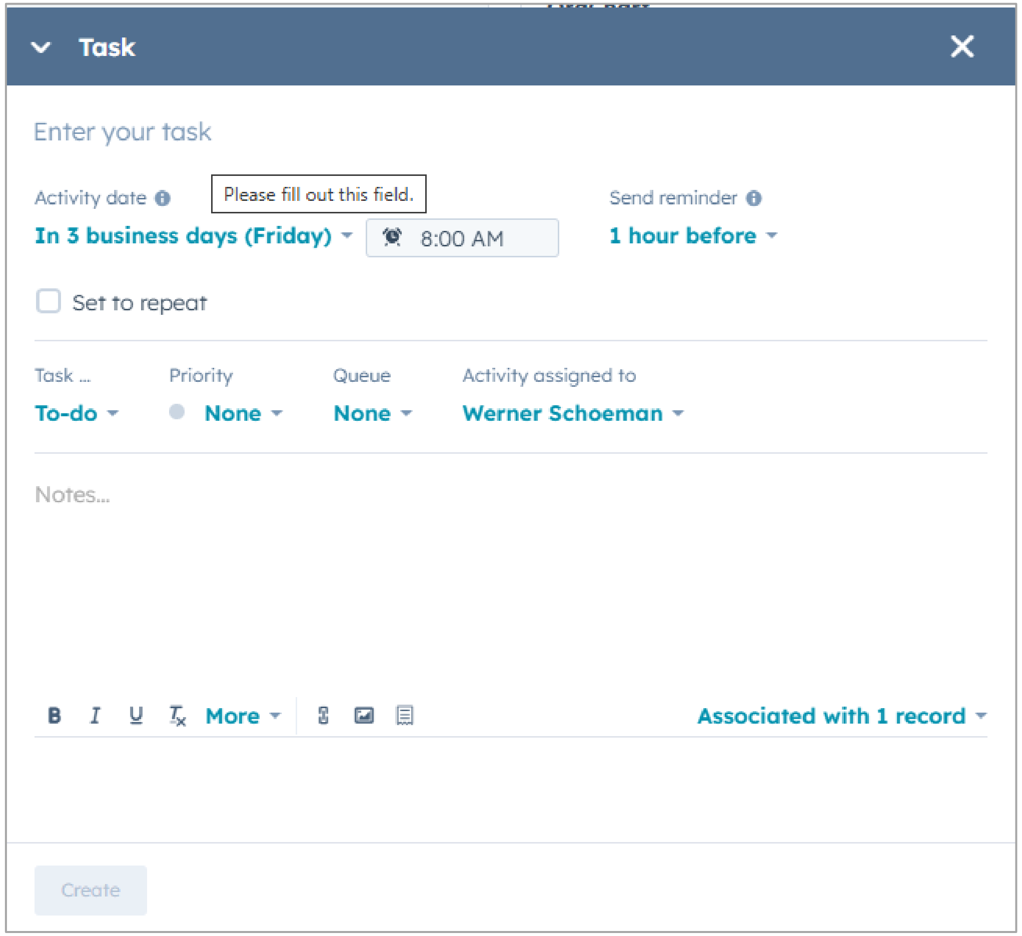
1. Creating new tasks from company, contact and deal records (see slide XX)



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



Creating new tasks from company, contact and deal records



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

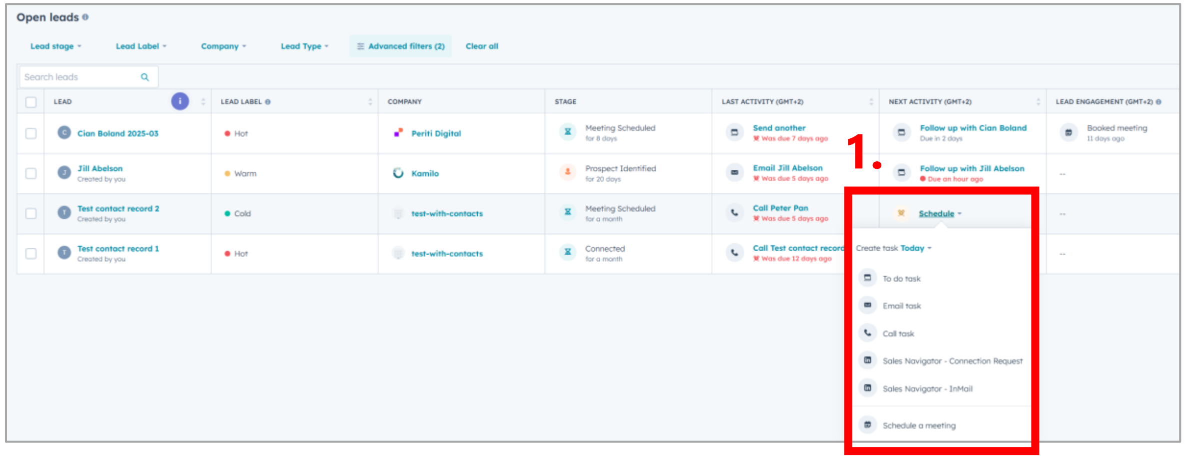
1. Set the due date,
2. Set a reminder,
3. Choose the type of task: To-do, call, email, connect / message via LinkedIn,
4. Priority, etc.

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

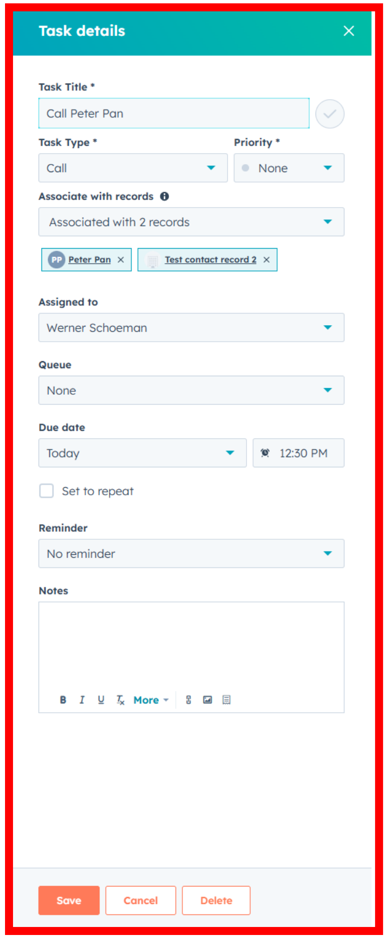
Creating a new task from the sales workspace

(Sales users only)

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

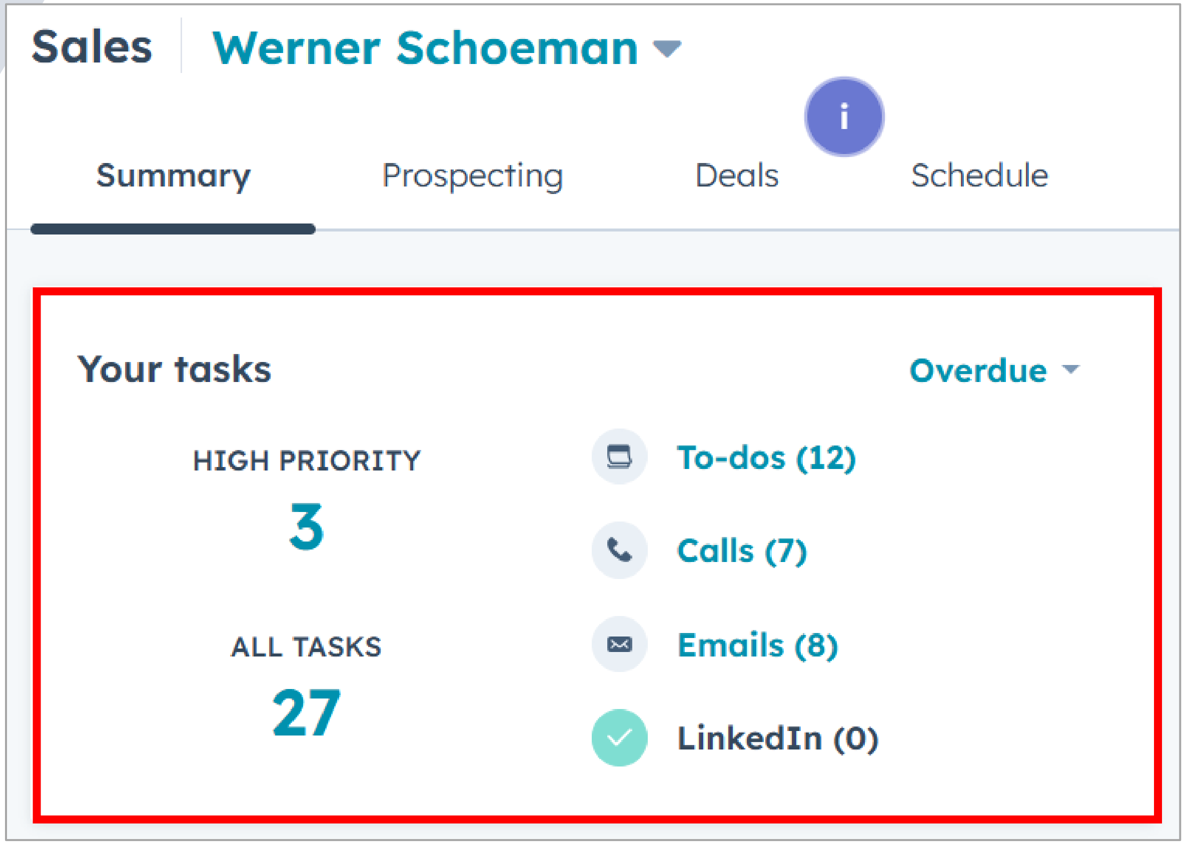


2.

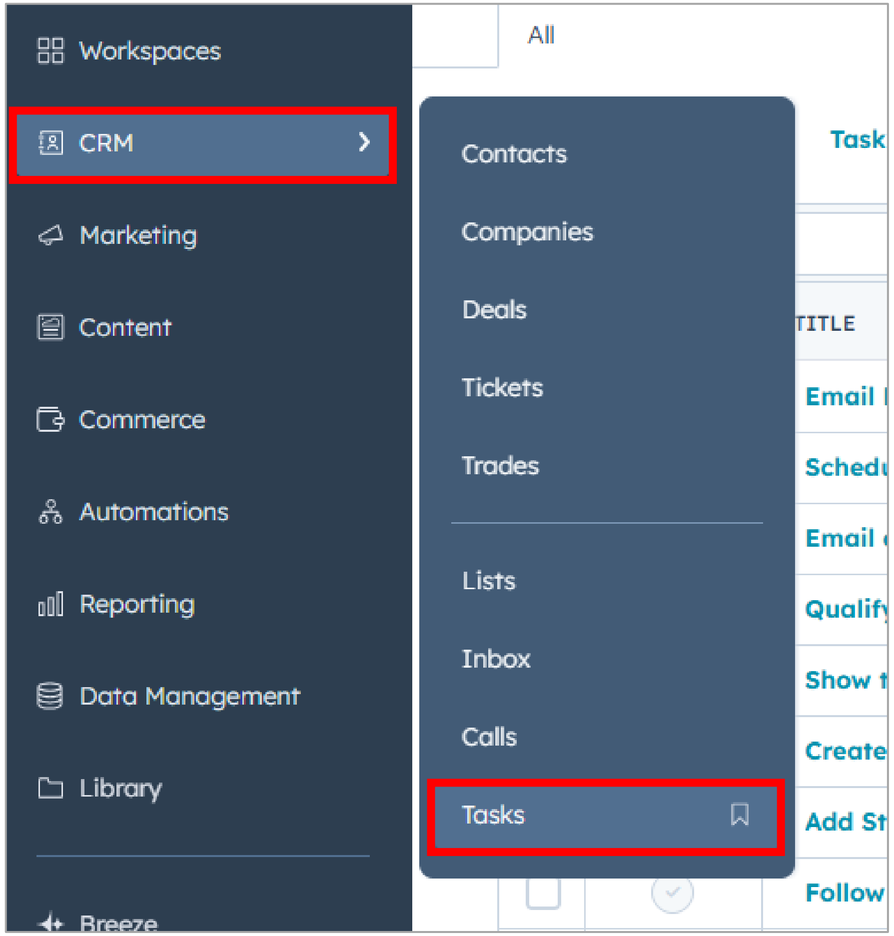


Access your list of tasks from the 1) sales workspace (sales users only) or the dedicated 2) Task dashboard

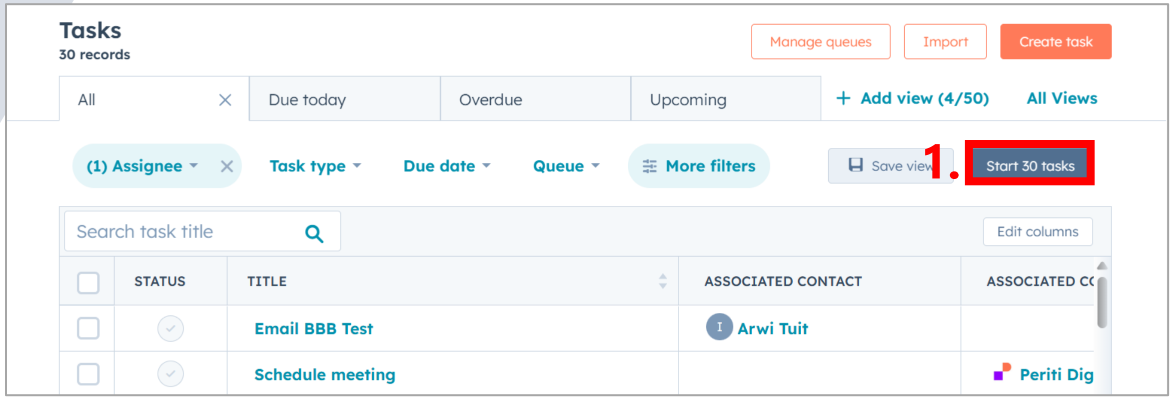
1.

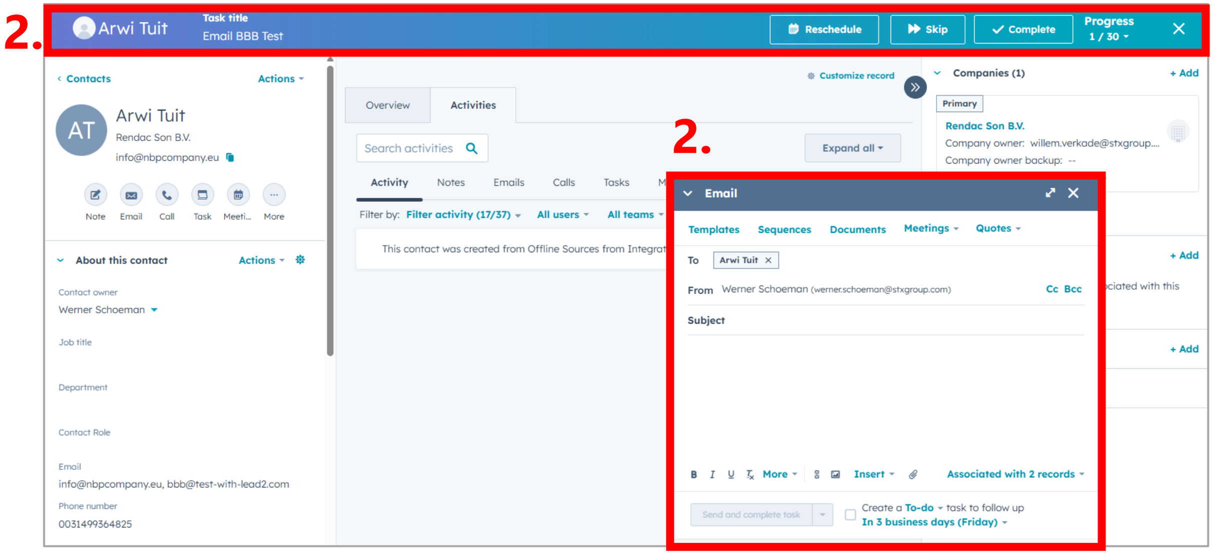


2.



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

Prospect identified → Outreach sent → Connected → Meeting scheduled → Qualified / Unqualified

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)

Discovery Initiated → Discovery completed → Follow-up agreed → Negotiations initiated → Contracting Initiated → Closed won / Closed lost

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

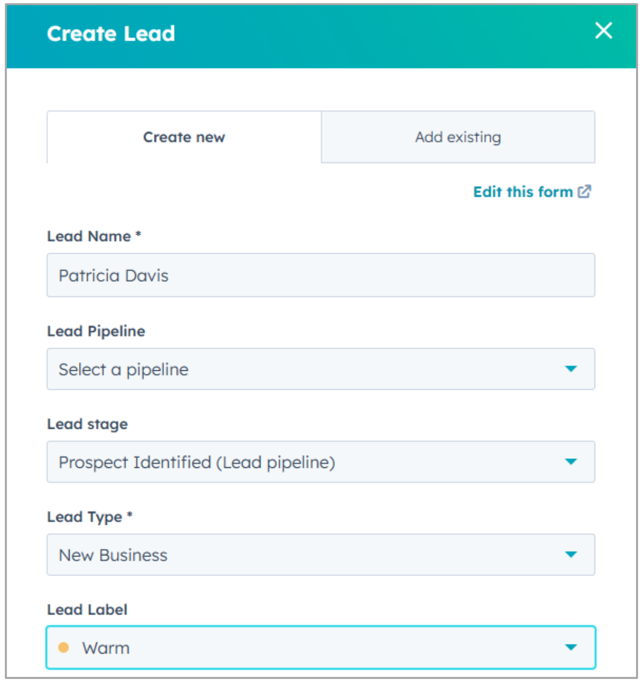
- Leads represent individuals that we want to connect with at a company.
- It is a dimension of contact records. Any information on the contact will transfer automatically to the lead, e.g. lead owner will be the same as contact owner.
- Leads are tracked automatically through 5 stages:
  - **Prospect 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".

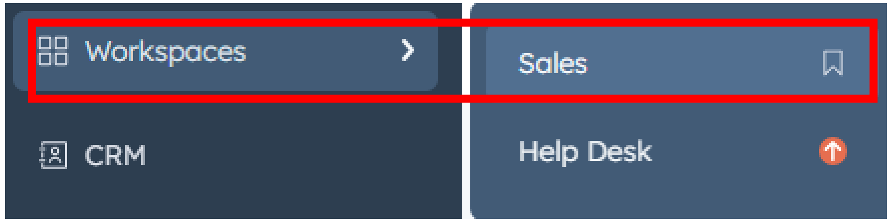


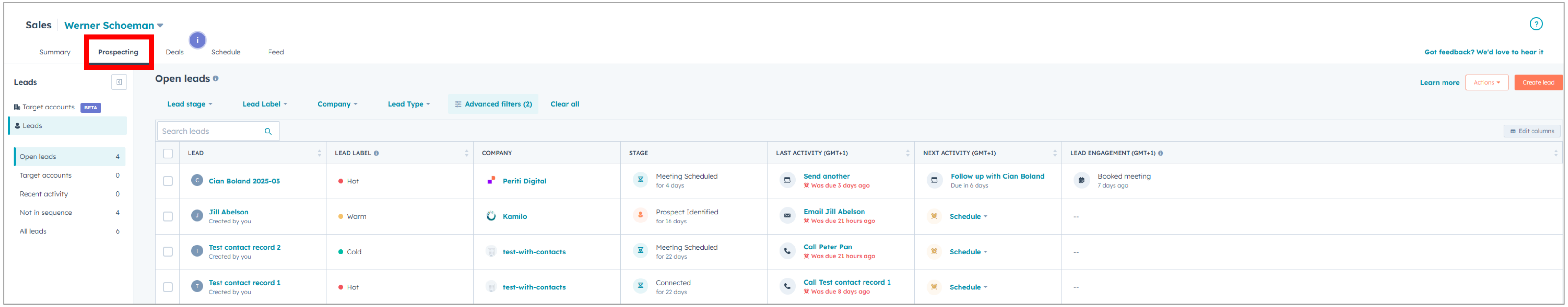
Navigating to the prospecting dashboard
(Sales licenses only)

Manage leads

Sales workspace

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



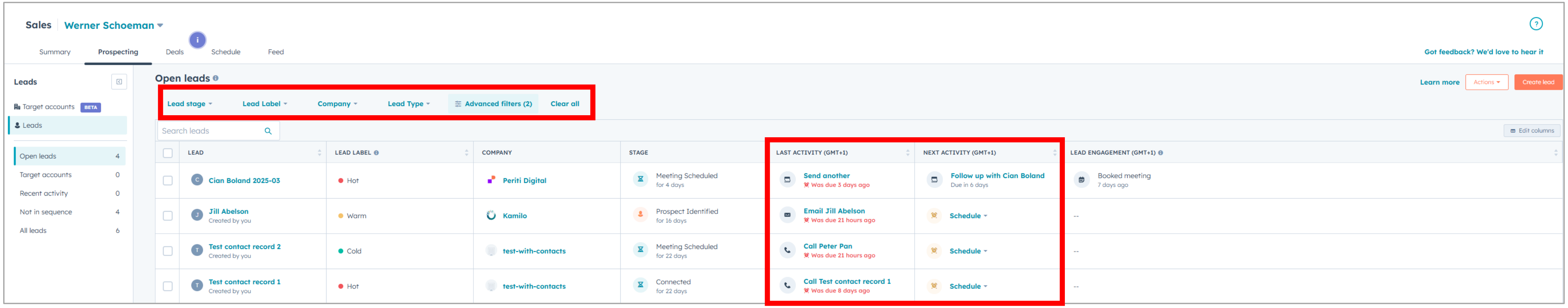


Managing leads
(Sales licenses only)

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



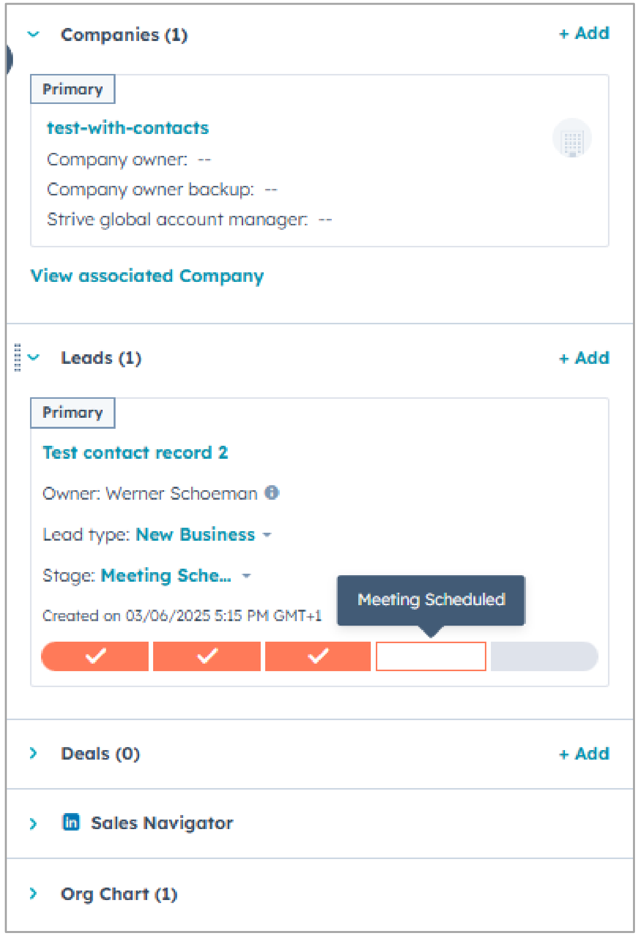
Lead stages are tracked automatically and qualified leads are converted into leads

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 a 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.



Pipelines: Deals

We track commercial interest in Hubspot with two objects

LEADS

Prospect identified → Outreach sent → Connected → Meeting scheduled → Qualified

Unqualified

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)

Discovery Initiated → Discovery completed → Follow-up agreed → Negotiations initiated → Contracting Initiated → Closed won

Closed lost

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:

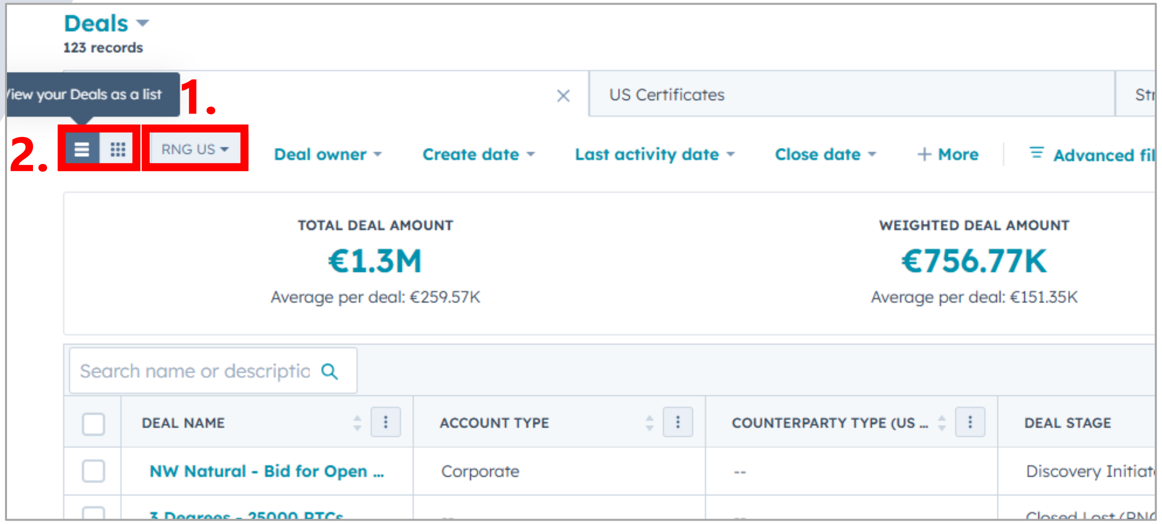
- The **deal becomes** visible to the Strive owner,
- **A clone is created** of the original deal in the Strive pipeline and the two deals become linked.

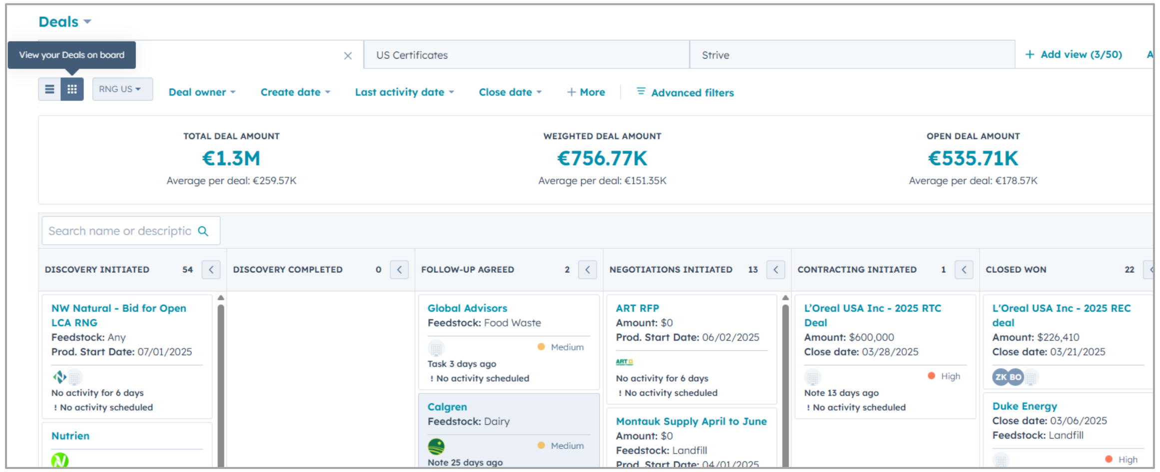
The standard deal stages for all pipelines

- 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



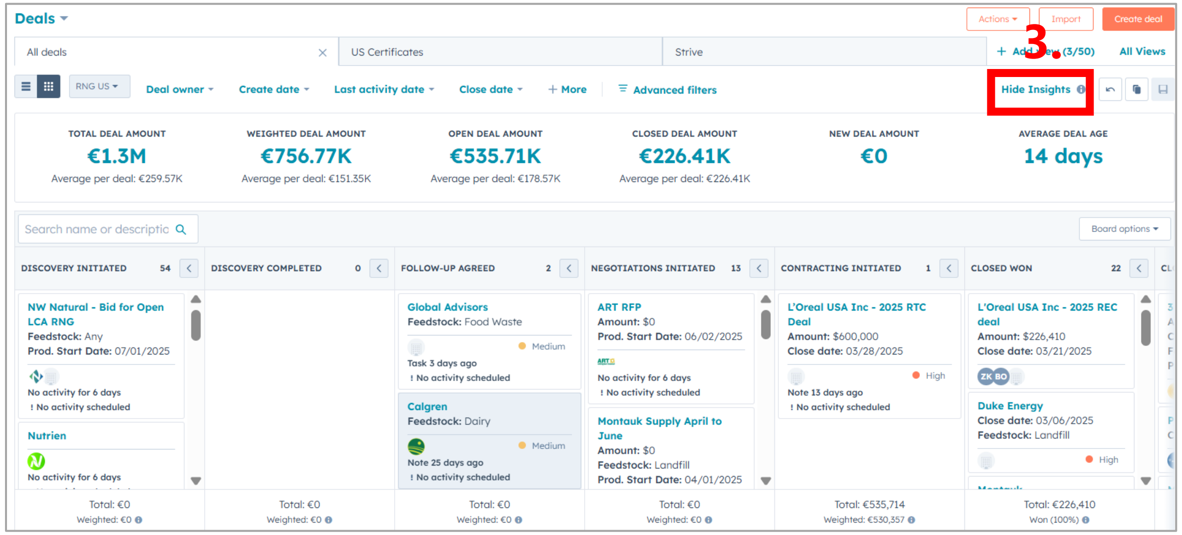


Navigate to CRM > Deals

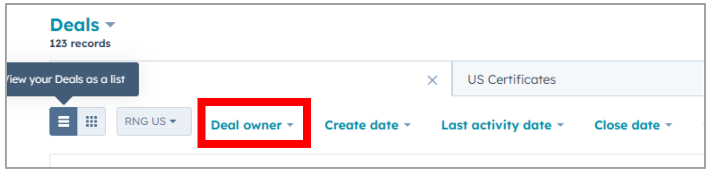
1. Make sure your team’s pipeline is selected, e.g. RNG US
2. Select to view your deals as a list or board

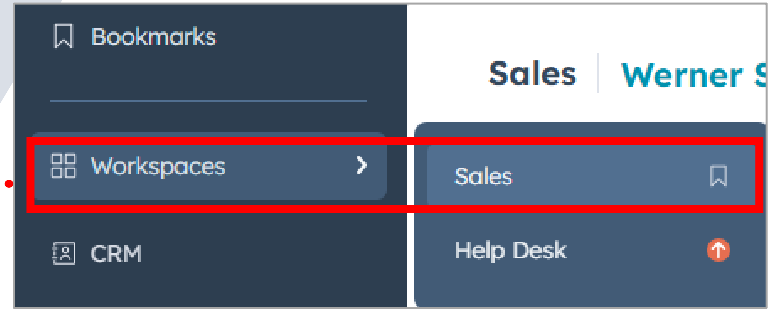
We have already created tailored list views for all the squares (click here to see how to add it)

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.

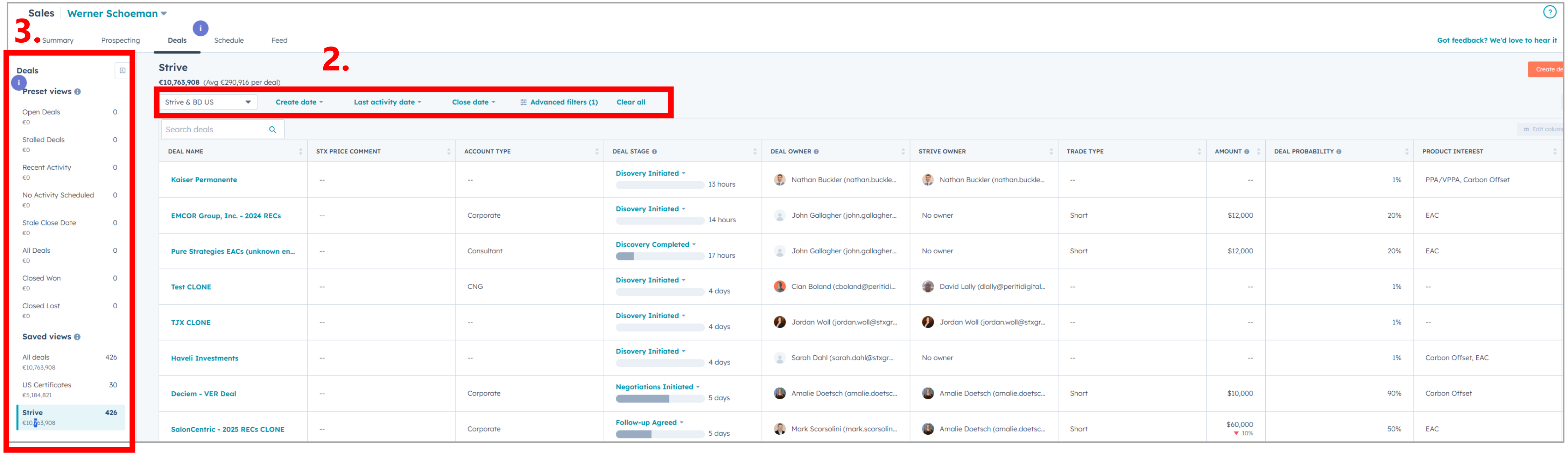


How do you see an overview of *your* deals

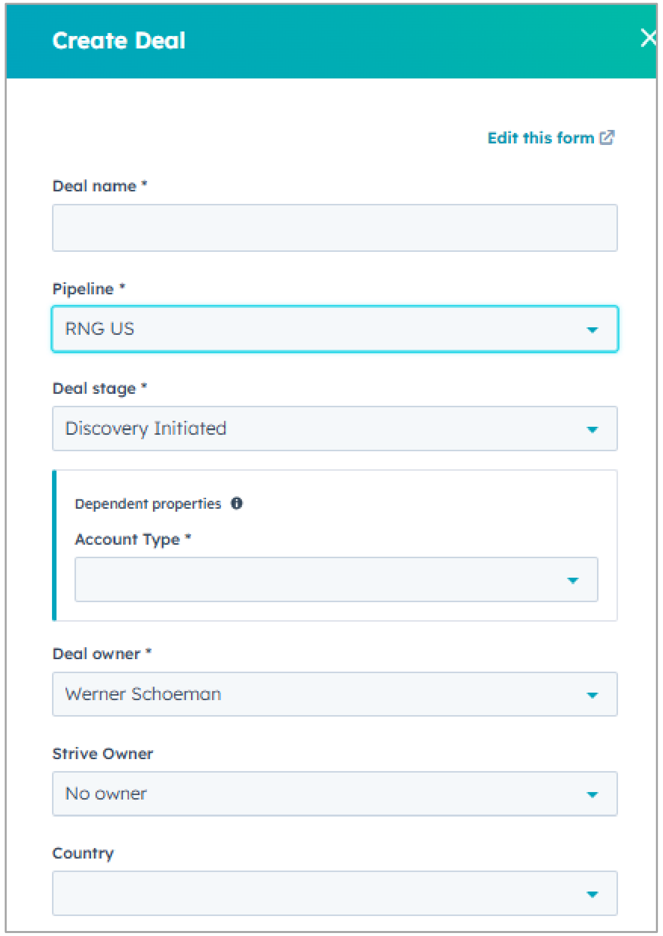
1.


2.


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 rhe 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.

3.
2.


Creating deals – deal information



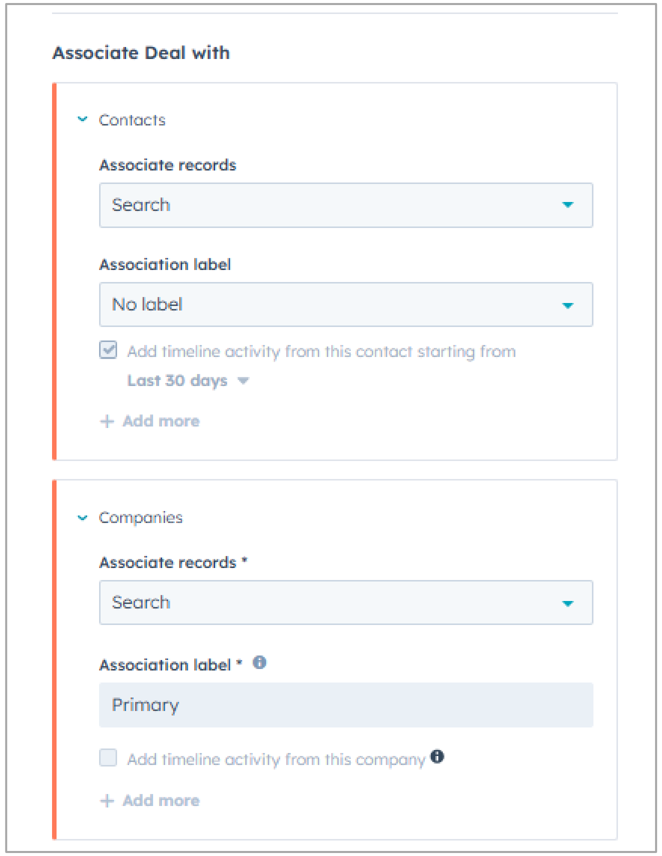
Creating deals consist of two components: deal information and associations (next slide).

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



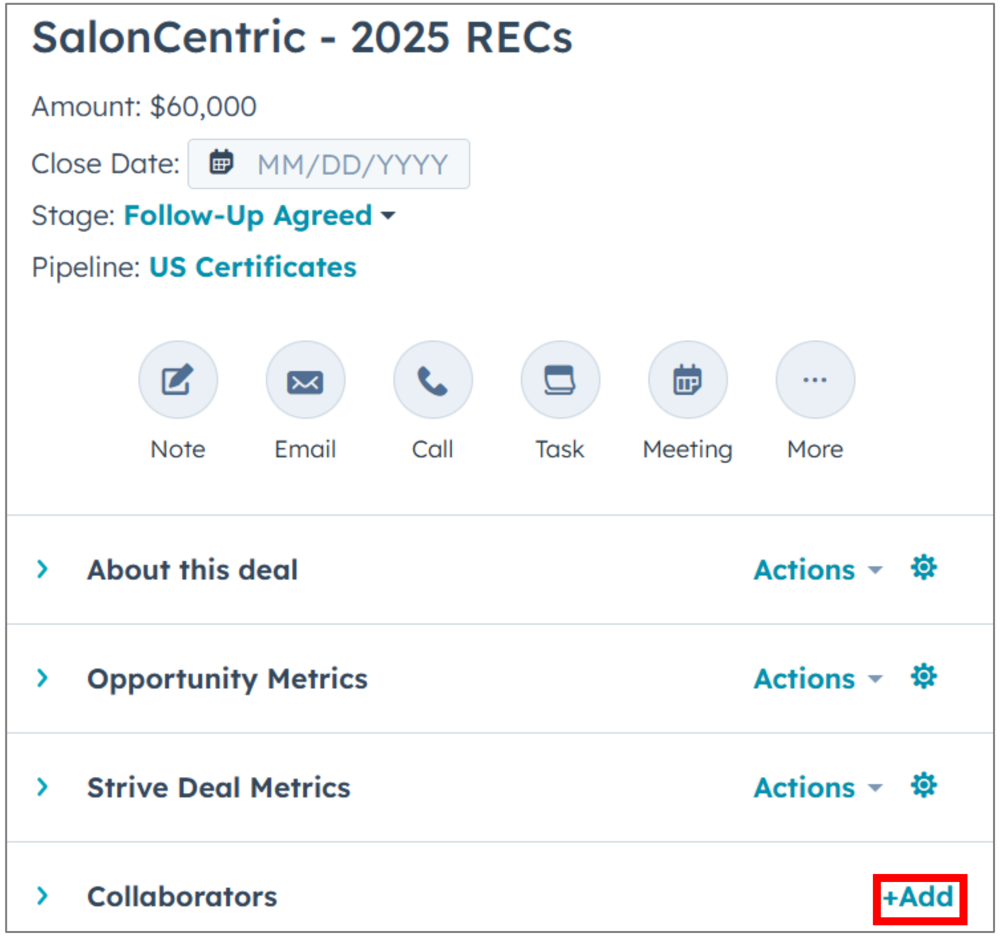
It is required to associate contacts and companies to deals:

- **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.

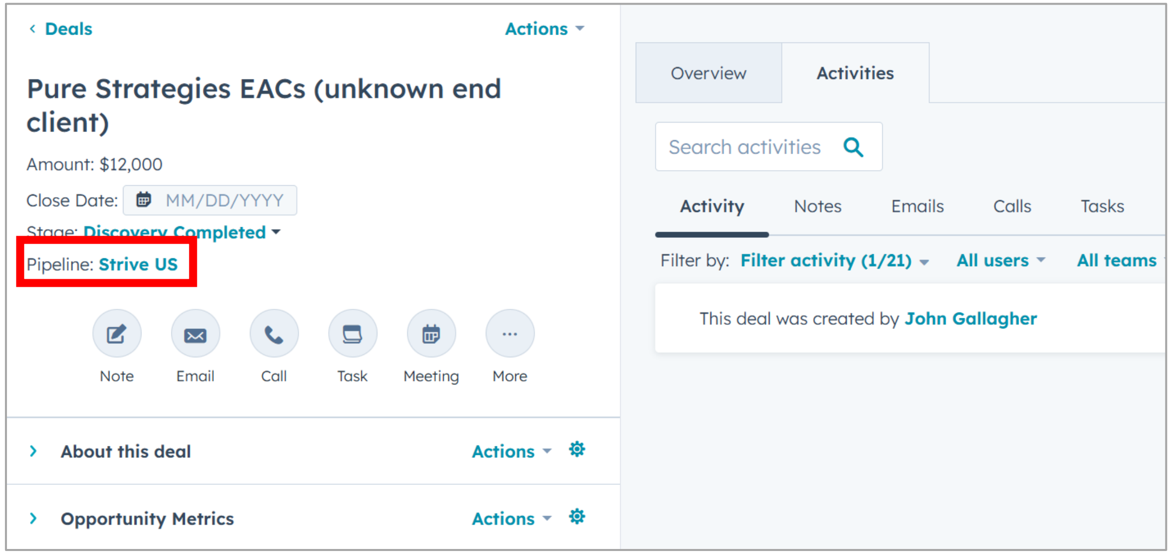
Add the activity timeline to make past correspondence visible on the deal record.

Adding collaborators to deals



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)



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

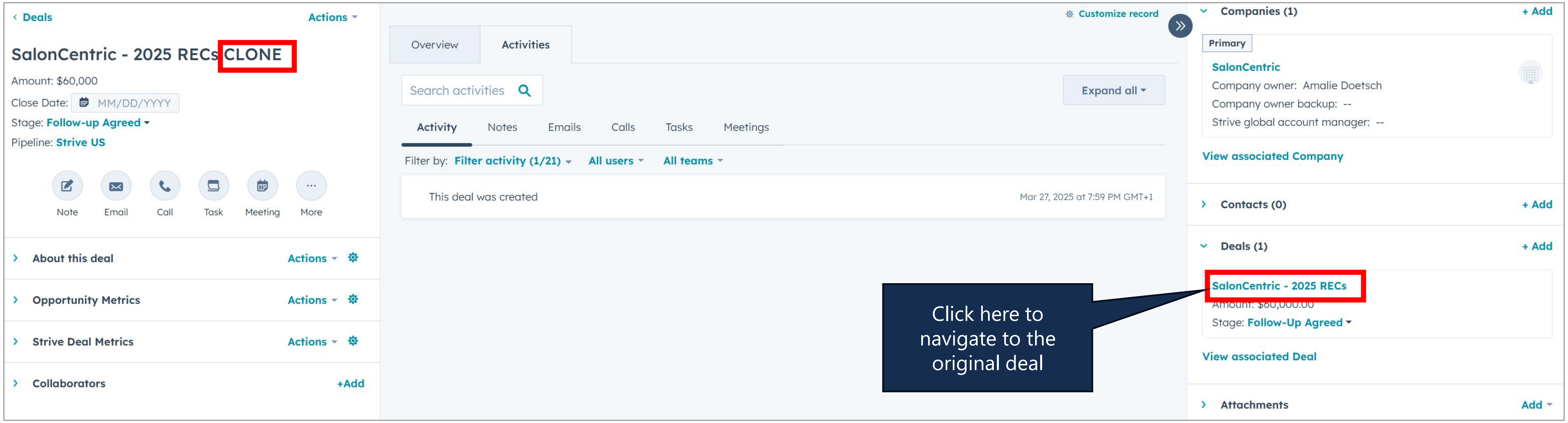
- Click the pipeline dropdown and select the new pipeline and deal stage. You will be asked to fill in the relevant dependent properties from that deal pipeline.
- After moving the deal, assign yourself as the Strive owner to trigger the workflow that creates a clone of the deal in the Strive pipeline.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

IMPORTANT:

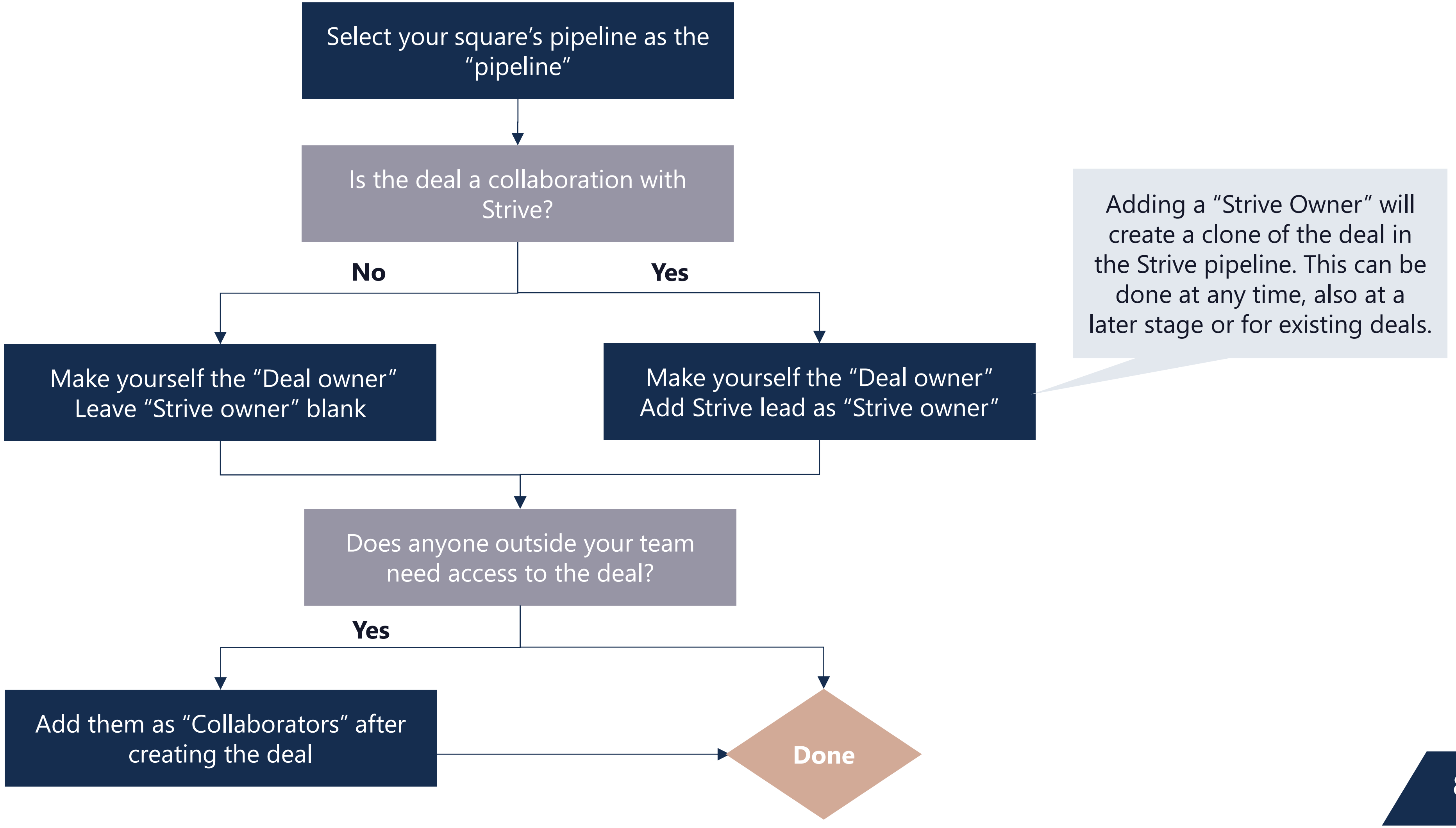
The sequence matters: adding a "Strive owner" before changing the pipeline won't trigger the cloning workflow. And if you change the "Deal owner" before assigning yourself as "Strive owner," you'll lose access to the deal.

Cloned deals
(Strive only)

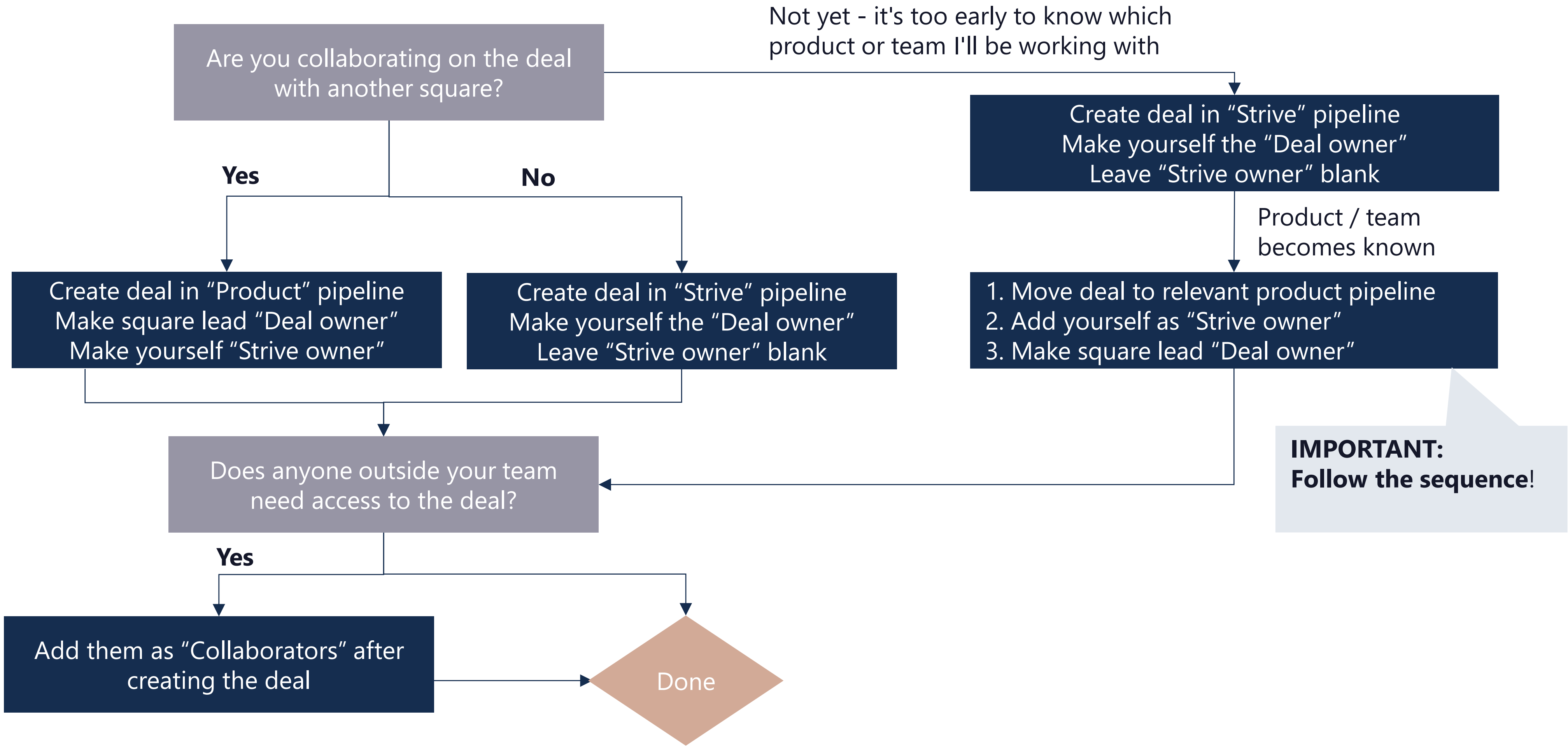
- Cloned deals allow Strive to track deals from other pipelines within the Strive pipeline.
- Cloned deals are labeled with “CLONE” in the title and are linked to the original deal.
- Never edit the cloned deal—always make changes in the original deal in the product pipeline.
- Updates to the original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



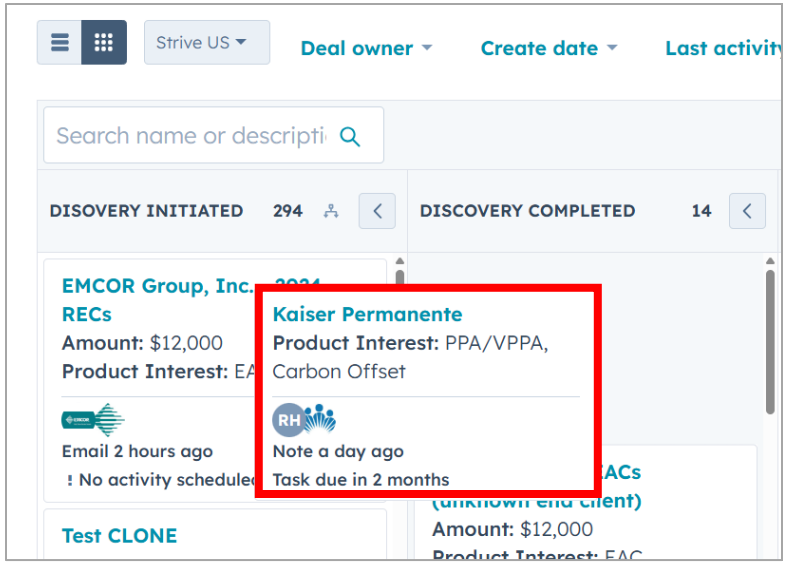
Deal creation workflow for all product squares, except Strive

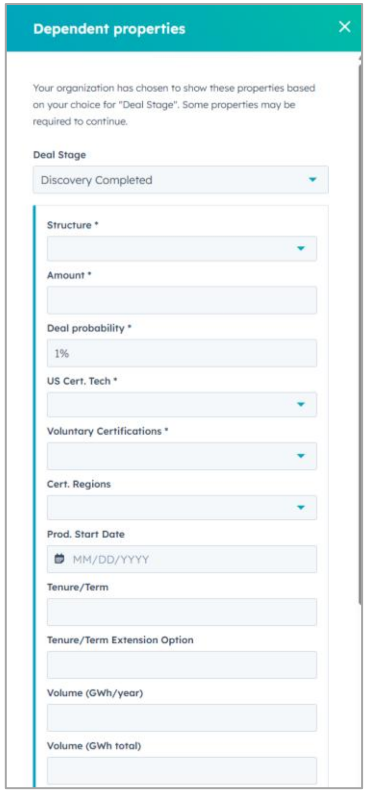


Deal creation workflow for Strive



Progressing deals through deal stages





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 relies to your email, they are **automatically unenrolled** from the sequence!!

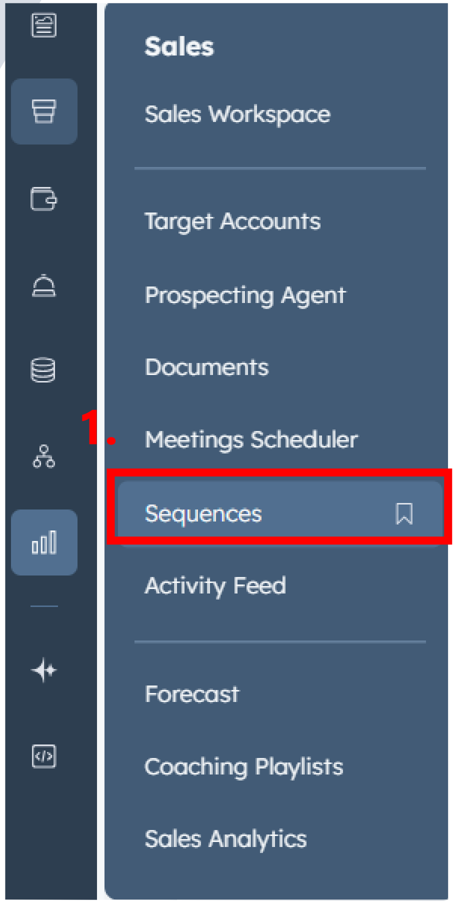
Example of a sequence

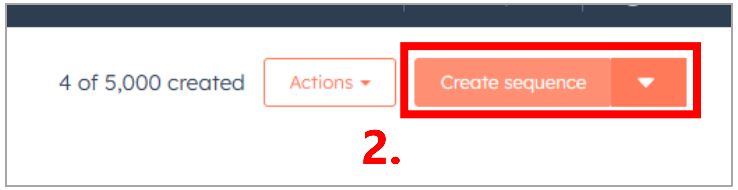
- Send a cold outreach email based on a pre-created template at 14:00 on the first coming Monday.
- Set a reminder to call the prospect two business days later (you can manually unenroll them if they answer!)
- Set a reminder to send an LinkedIn InMail one business day later.
- Send a follow-up second 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

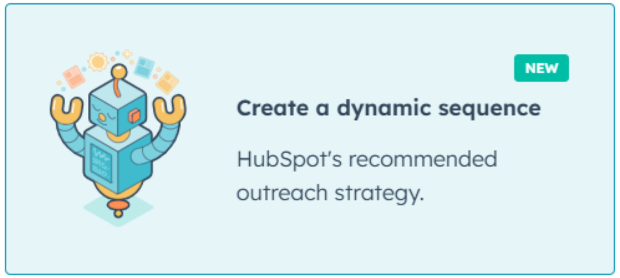
Step 1: Create a new sequence

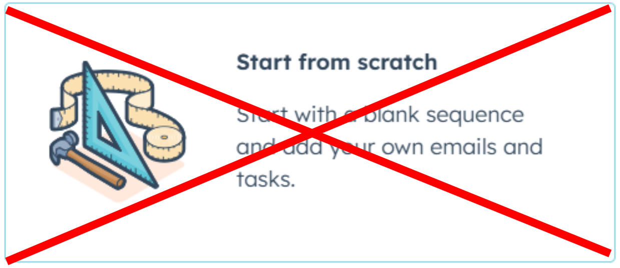




1. Select sequences
2. Select create sequence
3. Select Dynamic sequence OR a pre-made template

3.



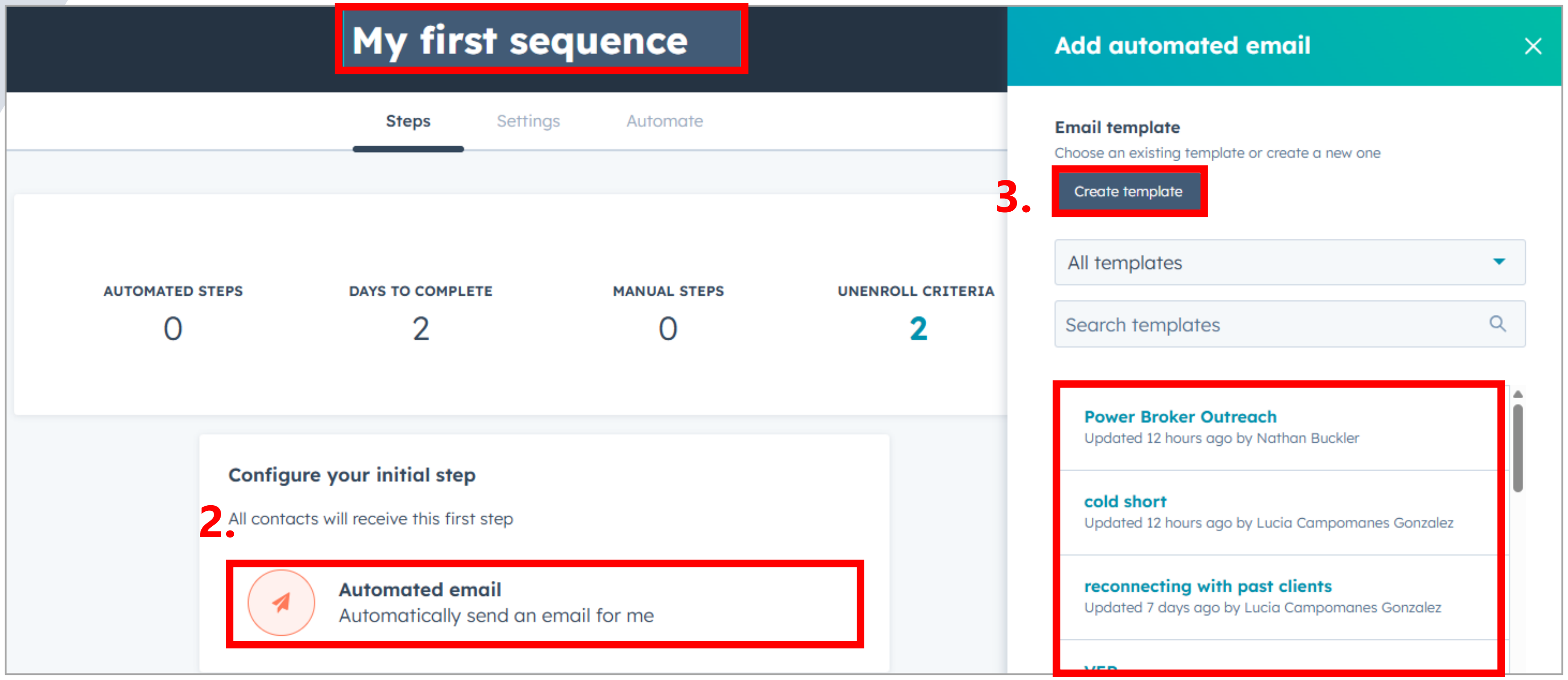


Why select dynamic sequences?

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

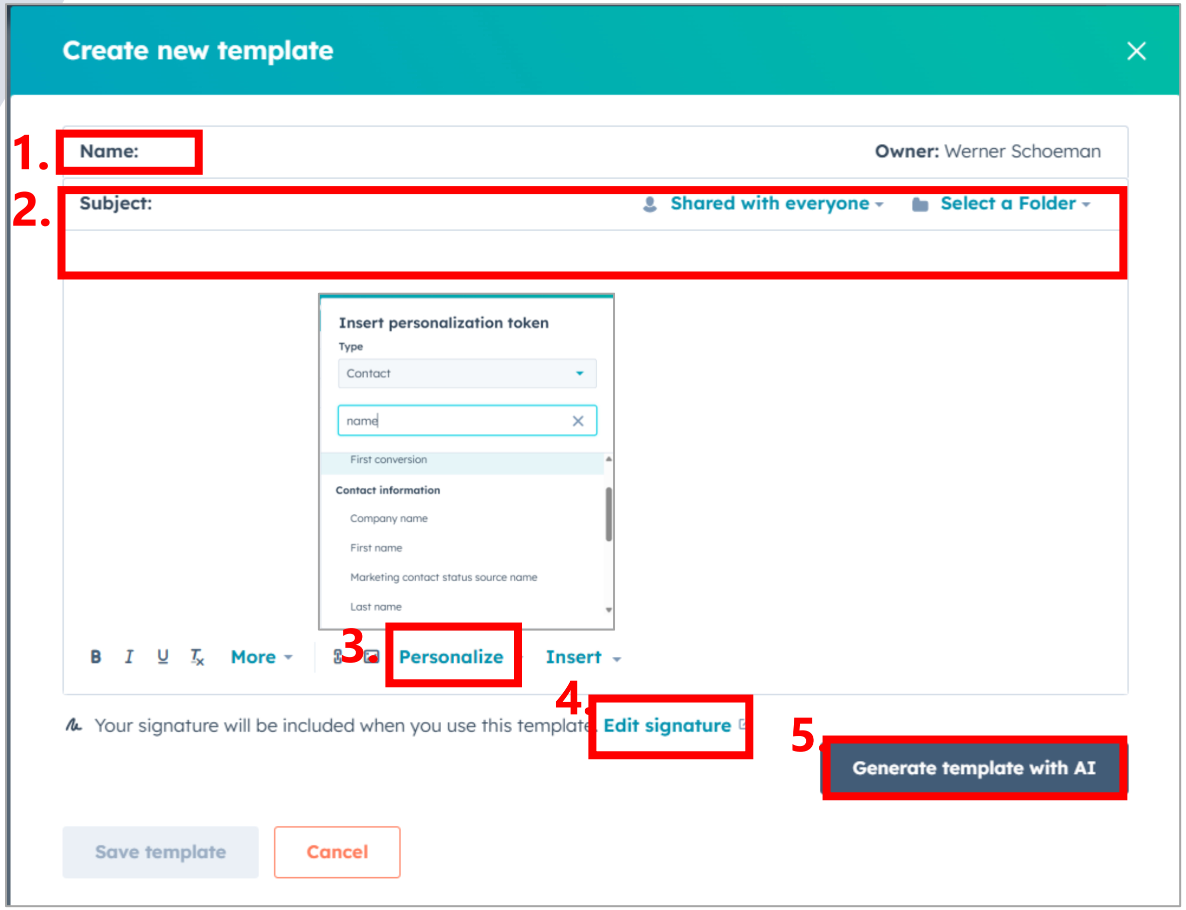
1.



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!)

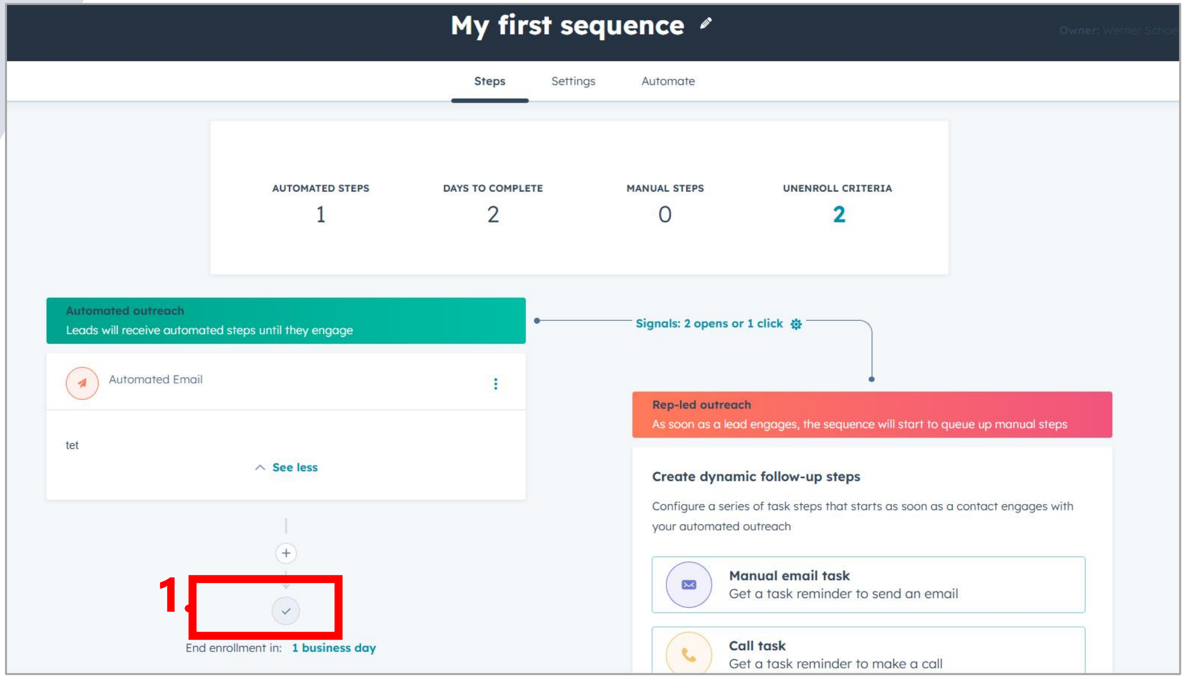
Creating you email template

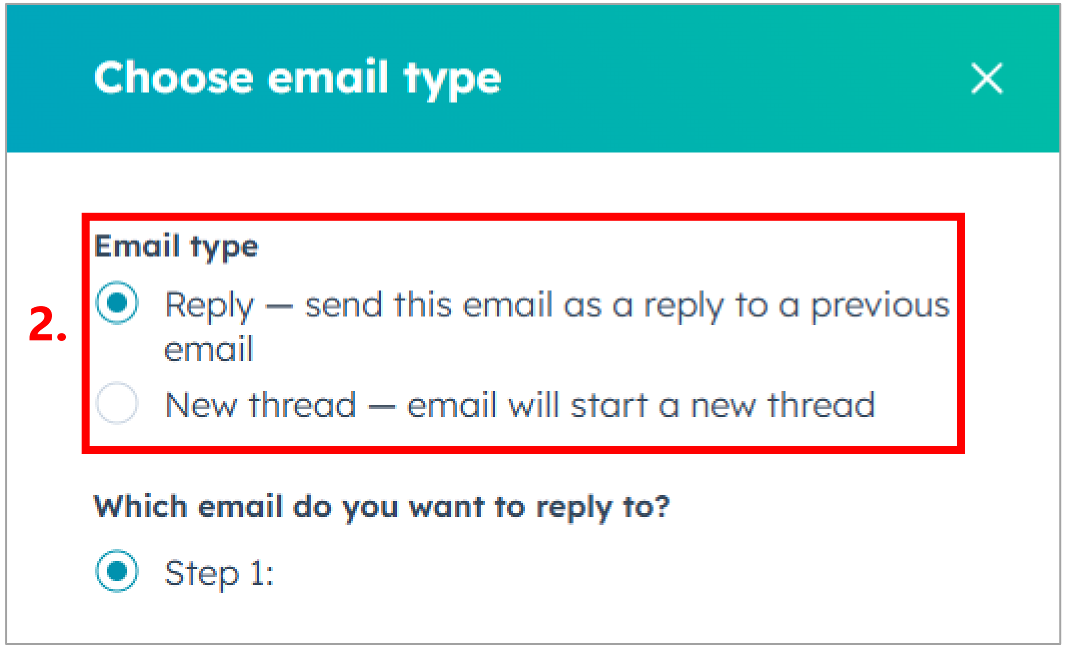


1. Name the template (this is internal use and to find it easil in your sequence)
2. Write the email subject and body, select who you want to share it with (choose your team!) and where to save it (create a folder for your team if it does not yet exist!).
3. Remember to personalize emails by inserting 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 important potential leads for you. Please reach out if you need support!

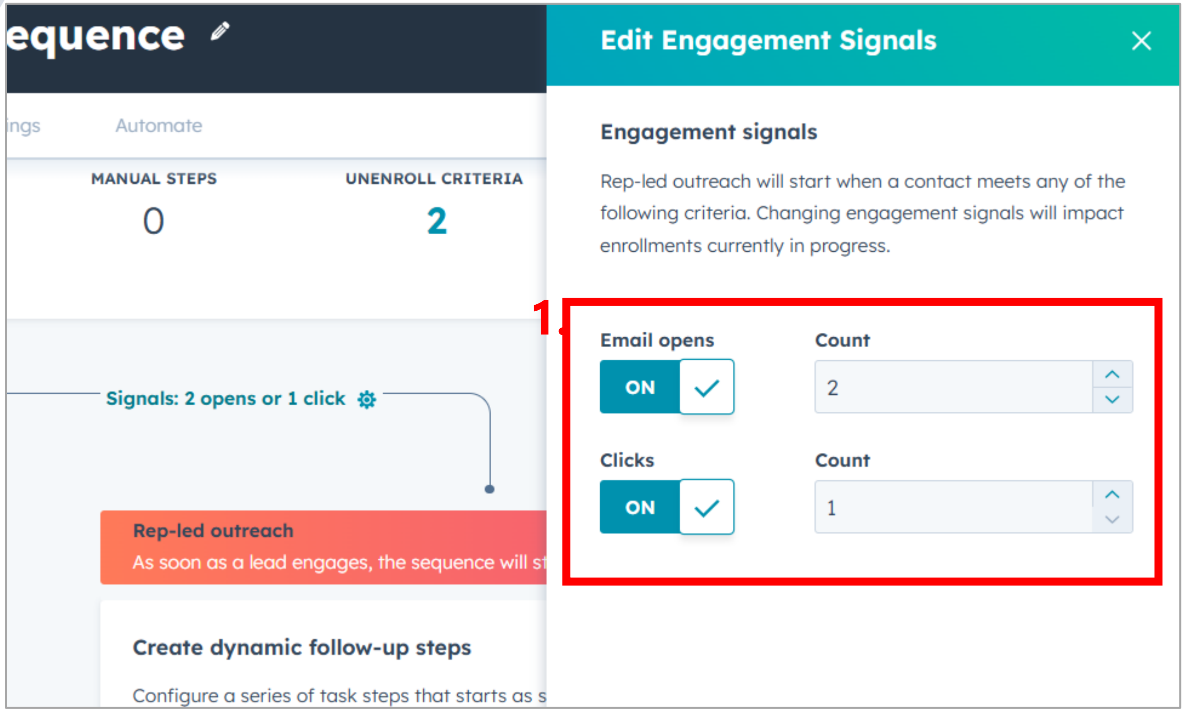
Add additional follow-up emails





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



- 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.

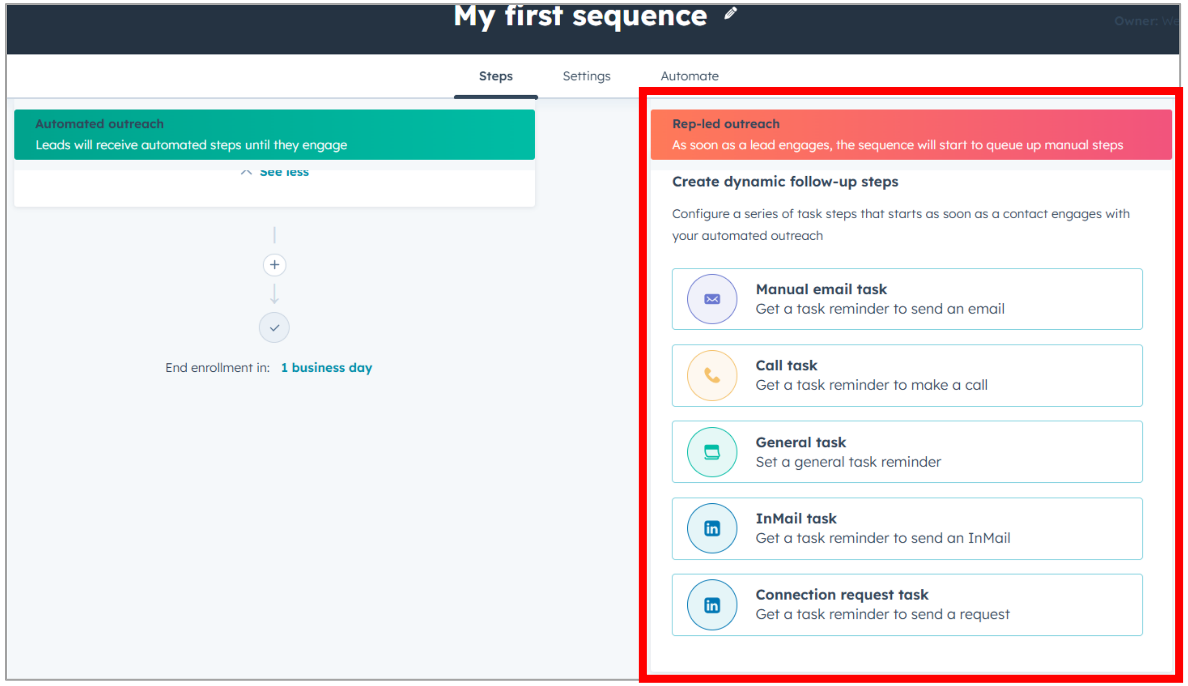
Engagement signals include:

- **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?

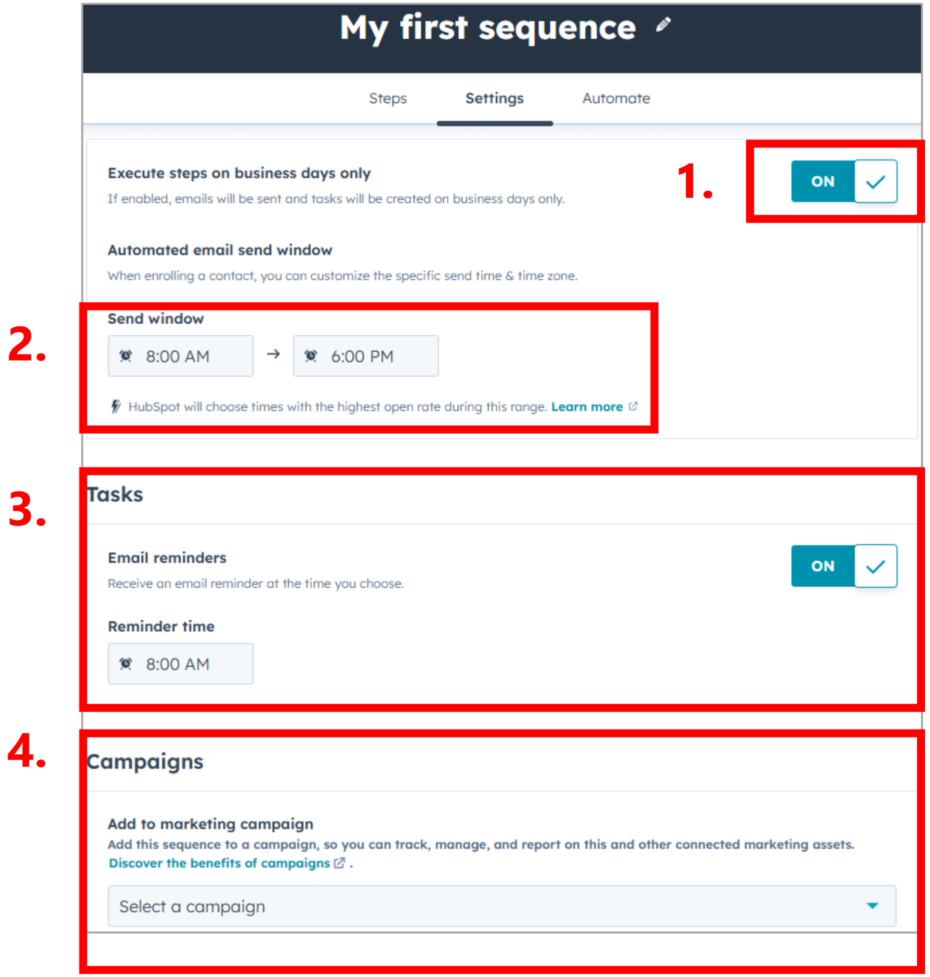
- These engagement signals suggest they may be more open to outreach. Unenrolling them allows for more personalized contact, like cold calling, helping you focus on prospects most likely to respond.

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 Huspot 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

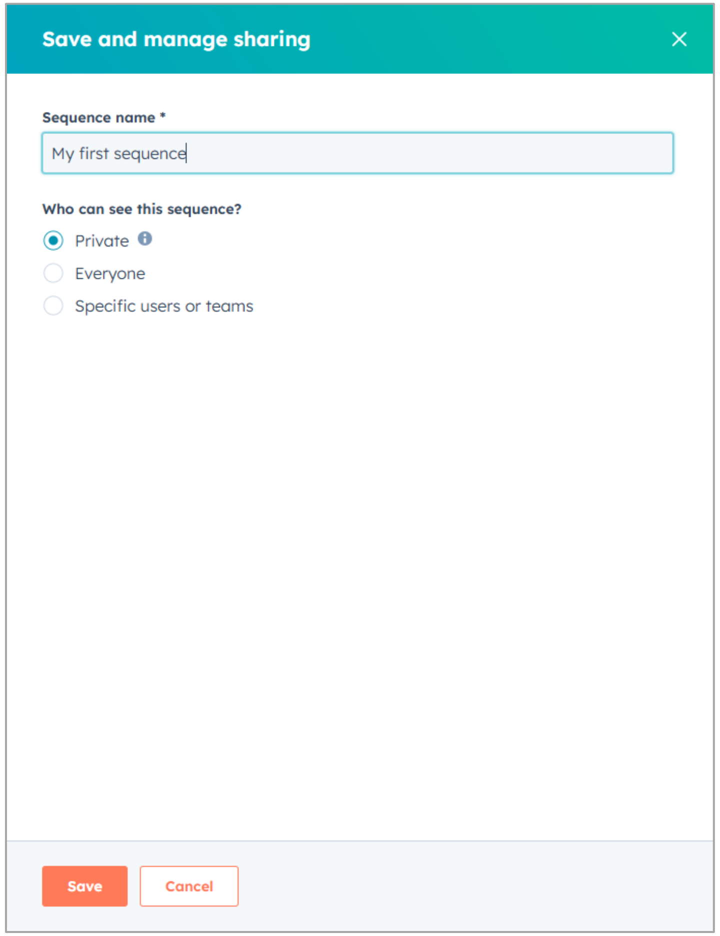


1. Make sure to only send automated emails during week days.
2. Hubspot will send the emails during the "recipients" time zone. If it does not know the recipients time zone, it will default to Eastern Daylight Time. The system will know this if the person has interacted with any of our Marketing or Sales 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

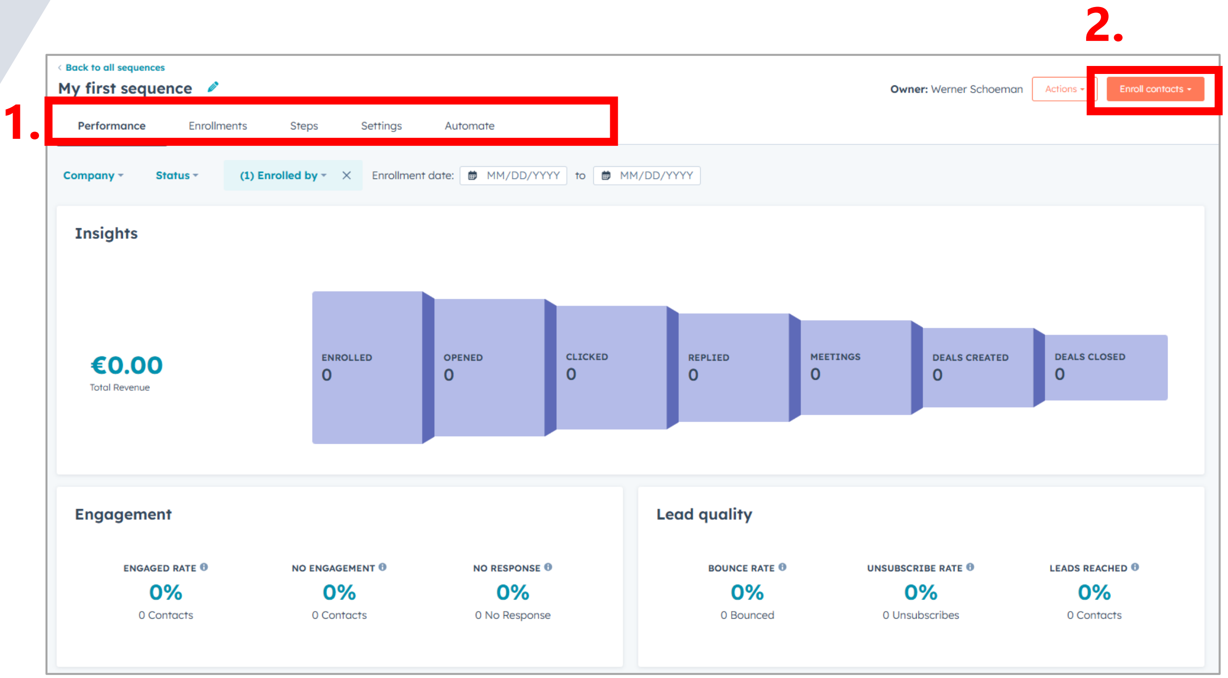
1. Contacts will automatically be unenrolled if they reply to an email or book a meeting with you using the meeting scheduling link (which you can add to the automated emails).
2. If you are reaching out to multiple people at the same company, make sure this is switched on so you unenroll everyone if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

Save the sequence



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

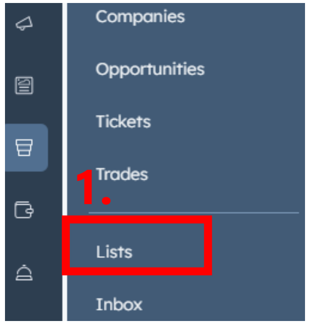


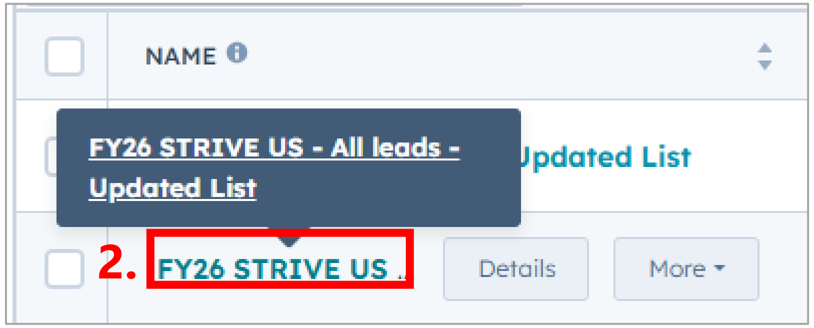
1. Click on the top menu bar to edit the sequence.
2. Manually enroll contacts

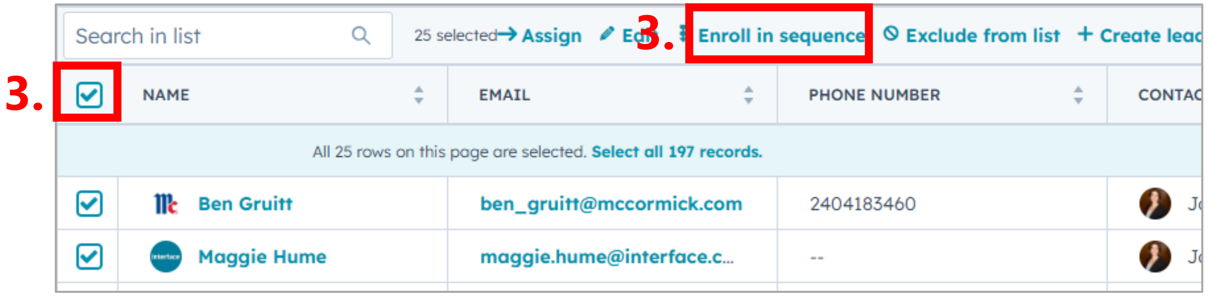
Other ways to enroll contacts in a sequence

Adding contacts on a list to a sequence

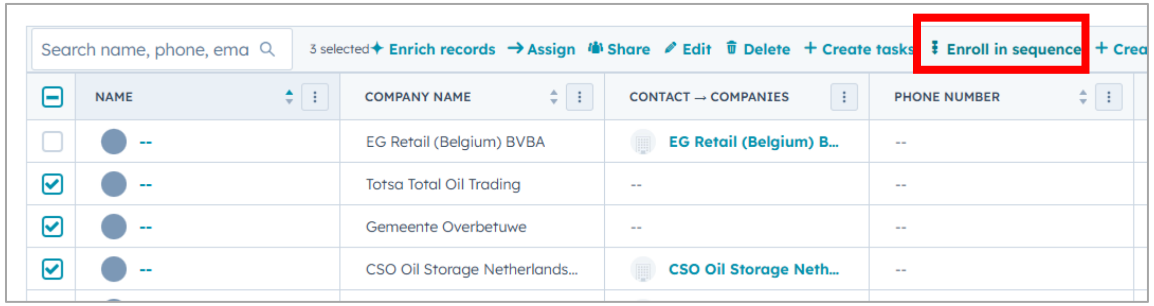
1. Navigate to lists.
2. Select the list provided by Marketing
3. Select the contacts you want to enroll. The top left checkbox selects all

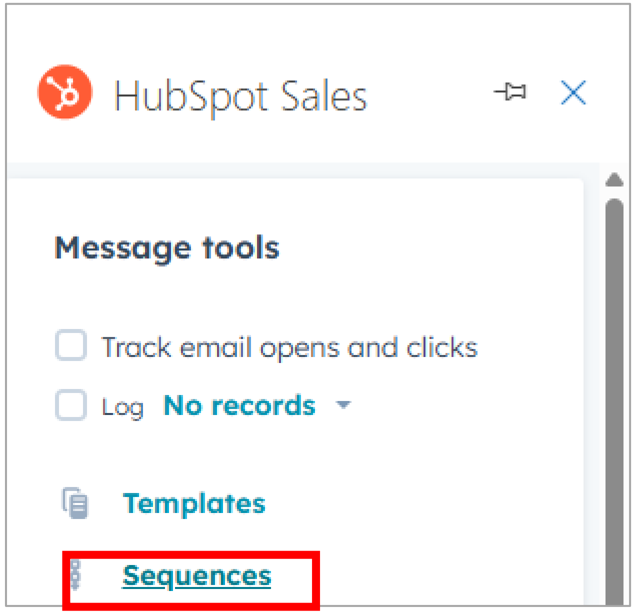






Add them directly from the contacts overview





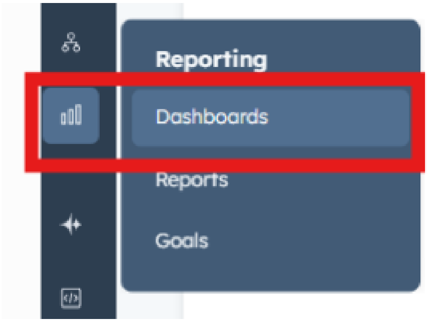
Or from within Outlook

Reporting Dashboards

How to access your dashboards

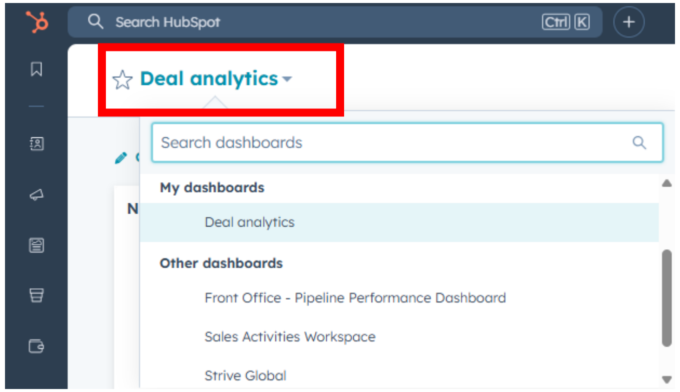
Navigate to:

Reporting > Dashboards



Select the right dashboard

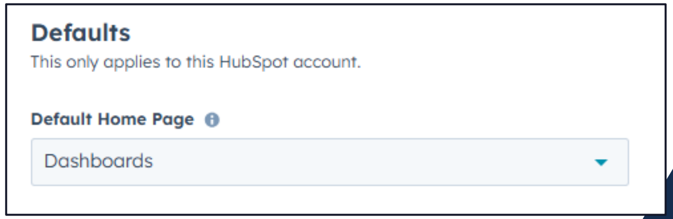
(Depending on your team and role, the available dashboards can differ)



Bookmark / set as homepage

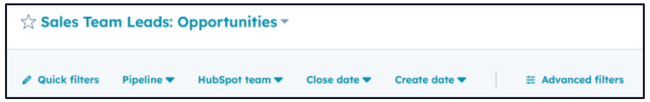
Click the 'Favorites star' next to the dashboard name to make it the first dashboard you will land on.

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



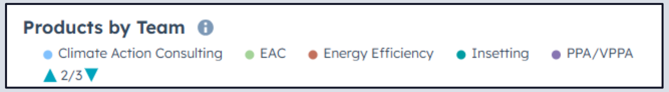
How to get the most out of your dashboards & reports

Dashboard filters:



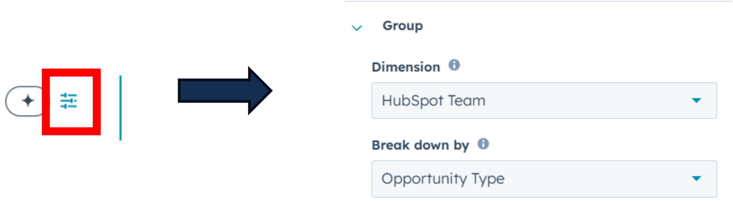
At the top of the dashboard, you can find the quick filters. Once you select a filter here, it will be applied across the reports in the dashboard in all reports where this filter can be selected.

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.