

scope

HubSpot is the company's system of record for sales relationship management. If a lead, customer, contractor, builder, referral partner, or project opportunity matters to the business, it must be entered and managed correctly in HubSpot.

policy statement

If HubSpot is not updated, the business cannot rely on the data for forecasting, follow-up, accountability, or reporting.

ownership and responsibility

Every user is responsible for entering information accurately, updating records promptly, avoiding duplicate records, using the correct record type, maintaining activity history, and keeping pipeline stages current.

definitions

Contact: A person. Used for homeowners, potential clients, current clients, contractors, builders, vendor reps, etc.

Company: An organization or business entity. Used for contractors, builders, vendors, HOAs, commercial clients, etc.

Deal: A sales opportunity or revenue opportunity. Used for builds or retail of materials and/or services.

how each work together

Think of HubSpot like this:

Contact = who.

Company = where they work or business entity.

Deal = what opportunity is being sold.

Example A: Homeowner project

Contact: John and Mary Doe

Company: none

Deal: Doe - Deck

Example B: Builder relationship with current project

Contact: Sarah Johnson

Company: Johnson Custom Homes

Deal: JCH - Deck - Elm Street

Think of HubSpot like this: Contact = who. Company = where they work or business entity. Deal = what opportunity is being sold.

Example C: Contractor account without active quote

Contact: Mike Anderson

Company: Anderson Construction

Deal: none yet.

Example A: Homeowner project
- Contact: John and Mary Doe; Company: none; Deal: Doe Residence - 16x20 Trex Deck.

Example D: Existing customer returning

Contact: Rob Carlson

Company: none

Deals: Carlson - Deck

Deals: Carlson - Pergola

Example B: Builder relationship with current project - Contact: Sarah Johnson; Company: Johnson Custom Homes; Deal: Elm Street Parade

A Contact can have multiple Deals. A Company can have multiple Contacts. A Company can also have multiple Deals. A Deal should always be associated to the correct Contact and, when applicable, the correct Company.

general crm standards

Always:

- Search before creating a new record
- Associate records correctly, log calls, emails, meetings, and notes
- Keep owner assignments accurate, update lifecycle and pipeline stages promptly
- Use naming conventions consistently - see section titled "Deals" below
- Create Deals for individual portions of a build, example: Deck Deal, Pergola Deal, Drop Screen Deal

Never:

- Do not create duplicate Contacts, Companies, or Deals
- Leave active opportunities without a Deal stage
- Use vague deal names
- Put project details only in personal notes outside HubSpot
- Leave records unowned unless intentionally unassigned
- Create junk records with incomplete information when enough data exists to do it properly.

Records should be updated immediately during or after customer interaction when possible, by end of day at the latest, before handing off to another team member, and before management review meetings.

contacts

Create a Contact when a person walks into the showroom and provides usable information, a lead calls, emails, or submits a form, a referral is received, a contractor or builder relationship is established, an existing customer returns and no Contact exists, or a project conversation becomes meaningful enough to track.

Before creating a Contact, always search HubSpot first using full name, phone number, email address, and company name if applicable. If a Contact already exists, update the existing record and do not create a new one.

At minimum enter:

- First name
- Last name
- Phone
- Email
- Contact owner
- Lead source if known
- Notes about why they are in the system.

When available, also enter

- Address
- Preferred communication method
- Project type
- Any segment data your setup uses

The Contact owner should usually be the primary project developer responsible for the relationship. Notes should capture what the person wants, timing, budget signals, objections, preferred next step, referral details, spouse involvement, urgency, and product interests.

Update the Contact whenever email, phone, address, owner, source, project interests, or relationship status changes.

companies

Create a Company when the Contact is tied to a business or organization that matters to the relationship, such as contractors, builders, commercial accounts, vendors, referral businesses, developers, or architects.

Before creating a Company, search by full company name, common abbreviations, website domain, and phone number. If it already exists, update it instead of making another.

At minimum, enter:

Company website

Company name

Company owner

Company phone

Notes on the relationship.

Helpful optional data includes category, account status, annual potential, territory, product focus, and resale status if tracked elsewhere.

Set the Company owner to the person responsible for managing the account relationship and update the Company when the main contact, address, account status, or business focus changes.

deals

Create a Deal when there is a legitimate sales opportunity worth tracking, such as a real project discussion, a quote or estimate being developed, a customer actively considering a purchase, or a defined opportunity with potential revenue.

A Deal represents one opportunity. Use separate Deals when projects happen at different times, different scopes need independent close tracking, or one customer has multiple unrelated jobs.

Use clear and searchable deal names.

Format: Last Name or Company Name - Project Type - PO (only when necessary)

Example: Smith - Deck

Example: Smith Construction - Deck - Johnson

Every Deal should include a deal name, deal owner, associated Contact, associated Company if applicable, pipeline, deal stage, estimated amount, close date estimate, and project type or category if available.

The Deal owner is accountable for next step, communication, stage accuracy, win/loss outcome, and cleanup. Deal amount should be realistic and updated as scope becomes more accurate.

Deal stage must reflect reality, not optimism. Move Deals forward only when the required milestone has actually occurred, and update the close date as timing changes.

Log calls, meetings, showroom visits, quote review meetings, emails, objections, site visit notes, next steps, decision timing, and budget shifts on the Deal so the record tells the story of the opportunity.

companies

Create a Company when the Contact is tied to a business or organization that matters to the relationship, such as contractors, builders, commercial accounts, vendors, referral businesses, developers, or architects.

Before creating a Company, search by full company name, common abbreviations, website domain, and phone number. If it already exists, update it instead of making another.

At minimum, enter:

Company website

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Company phone

Notes on the relationship.

Helpful optional data includes category, account status, annual potential, territory, product focus, and resale status if tracked elsewhere.

Set the Company owner to the person responsible for managing the account relationship and update the Company when the main contact, address, account status, or business focus changes.

association

Associate a Contact to a Company when the person works for or represents that business. Associate all relevant decision-makers and participants to the Deal. Associate the Company to the Deal when the opportunity belongs to or is driven by that company.

Correct associations allow full communication history, better reporting, cleaner handoffs, better marketing segmentation, future account visibility, and more reliable forecasting. Broken associations create confusion and bad data.

lifecycle

Lifecycle stages may vary by HubSpot setup, but the operating principle should stay consistent. Once a real sales conversation starts, the record should no longer be treated as just a casual lead. Once a sale is won, the record should reflect customer status. Repeat customers should retain historical continuity.

process flow

New homeowner walk-in: search HubSpot, create Contact if needed, capture phone/email/address if possible, create Deal if there is a real project, associate the record, schedule the next step, and log the note immediately.

New contractor or builder: search for existing Company and Contact, create or update both as needed, associate them, create a Deal for any active project opportunity, assign the proper owner, and log relationship notes and the next step.

Existing customer with new project: search the existing Contact, confirm details are current, do not create a duplicate, create a new Deal for the new opportunity, associate the existing Contact, and log the current project details and timing.

Use separate Deals when one customer wants a deck now, pergola later, and awning next season if timing, scope, or close outcome differ enough to track independently.

activity logging

Log calls with date, participants, summary, outcome, and next step. Log emails through HubSpot whenever possible so communication history is visible to the team. Log meetings with what was reviewed, who attended, decisions made, next step, and expected timing.

Estimate or quote delivery meetings done in office should be logged as meaningful milestones. Notes should be factual, useful, professional, and never emotional or inappropriate.

data quality

Always search first to prevent duplicates. Common duplicate causes include spelling differences, LLC versus Inc naming differences, one record created from a form and another by staff, husband and wife mixed into one record incorrectly, or contractor accounts existing as both Contact-only and Company-only with no association.

A partially complete record is acceptable if the lead is fresh, but strong opportunities should not remain weak in record quality.

Active Deals without recent activity, past due close dates, no next step scheduled, stale stages, or missing amounts are warning signs and should be reviewed regularly.

When an opportunity is truly dead or lost, move it to Closed Lost and document why, such as price, timing, competitor chosen, postponed project, no response, or project canceled.

ownership & accountability

The record owner is responsible for accurate record creation, associations, stage updates, next steps, activity logging, cleanup, and win/loss documentation. Management is responsible for enforcing usage standards, reviewing data cleanliness, coaching stage discipline, auditing pipeline accuracy, correcting misuse trends, and ensuring team adoption.

correct usage

Example 1: Homeowner deck lead

Contact: Tom Wilson; Deal: Wilson - Deck

Company: none

Activities: showroom visit note, follow-up call, and quote review meeting

Deal amount: estimated project value

Deal owner: responsible salesperson.

Example 2: Contractor account with multiple jobs

Company: Reed Construction LLC

Contact: Paul Reed

Deals: Reed Construction LLC - Deck - Maple St

Deals: Reed Construction LLC - Pergola - Lakeside Restaurant

review cadence

Daily: sales users should review tasks, open Deals, activity logs, stages, and next steps.

Weekly: managers should review new Contacts, new Companies, new Deals, stale Deals, close dates, stage accuracy, and owner accountability.

Monthly: leadership should review pipeline quality, source quality, win/loss trends, duplicate issues, usage compliance, and reporting usefulness.

summary

HubSpot should function as a live operational tool, not just a digital address book. A clean CRM allows the company to follow up better, forecast better, measure performance better, preserve relationship history, avoid dropped opportunities, and improve accountability. If the team uses Contacts, Companies, and Deals correctly, HubSpot becomes a reliable sales system. If the team uses them inconsistently, HubSpot becomes cluttered and untrustworthy.