# CRM Workflow SOP – Pipeline Management & Sales Support

This document outlines a standardized CRM workflow used in my previous roles to maintain pipeline integrity, support account executives, and optimize deal flow using HubSpot and Salesforce.

## 1. Lead Intake & Qualification

- All inbound leads are captured via forms, email tracking, or event lists and immediately assigned a lead owner.  
- Qualification is done within 24 hours using criteria such as budget, authority, need, and timing (BANT).  
- Qualified leads are tagged by segment (retail, hospitality, restaurant) and entered into the active pipeline.

## 2. Pipeline Staging

- Opportunities are categorized using deal stages: Prospecting, Discovery, Demo Scheduled, Proposal Sent, Negotiation, Closed-Won/Lost.  
- Every opportunity must have a next activity logged (call, meeting, follow-up).  
- Stale deals (14+ days without activity) are flagged and reviewed weekly.

## 3. Data Hygiene & Reporting

- Weekly pipeline reviews ensure consistent use of fields: industry, source, stage, deal value, close date.  
- Duplicates are merged manually every Friday.  
- Dashboards track deal velocity, conversion rates, and rep-specific pipeline health.

## 4. Handoff & Post-Sale

- Once a deal is marked Closed-Won, AE submits a standardized handoff form to Customer Success.  
- CRM is updated with onboarding notes, relevant documents, and account tags.  
- Post-sale follow-up is scheduled within 30 days to check satisfaction and upsell potential.

## Tools Used

- CRM Platforms: HubSpot, Salesforce  
- Email Tracking: HubSpot Sales, Outlook Extensions  
- Reporting: HubSpot Dashboards, Salesforce Reports, Excel  
- Calendar Integration: Google Calendar, HubSpot Tasks