

HubSpot Activity Logging Guideline

This document outlines how activities, including meetings and calls, should be logged in HubSpot to ensure consistency, accuracy, and clarity in tracking client interactions.

Call and Meeting Types:

1. **Outbound Sales Meeting (In person):**

Definition: A face-to-face meeting with a potential new client or an existing client with a new application, generated through outbound BDM activity. These meetings are focused on discussing products, services, or solutions to generate new business.

2. **Outbound Sales Meeting (Remote):**

Definition: A virtual meeting conducted remotely (via phone or video) with a potential new client or existing client with a new application, generated through outbound BDM activity. These meetings aim to discuss business opportunities and generate new sales.

3. **Inbound Sales Meeting:**

Definition: A meeting initiated by a prospective customer who has shown interest in the company's products or services. The focus is on understanding the client's needs and progressing toward a solution.

4. **Ongoing Deal Meeting:**

Definition: A meeting focused on reviewing and advancing an active deal in the pipeline. Discussions often involve key points of the deal, such as following up on a proposal, confirming timelines, or addressing any deal-related issues.

5. **Existing Client Meeting:**

Definition: A meeting with an established client aimed at maintaining and nurturing the relationship, discussing any ongoing projects, or exploring future business opportunities.

6. **PSA Meeting:**

Definition: Regularly scheduled meetings to review the ongoing support provided by RTI, specifically assessing the performance of the analysers and discussing any improvements or support adjustments needed.

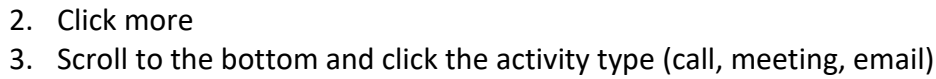
7. **Support Call/Meeting:**

Definition: A meeting or call focused on providing technical support to an existing client. This includes troubleshooting or addressing any issues related to the client's use of products or services.

8. **Internal Meeting:**

Definition: A meeting involving RTI internal stakeholders, typically focused on strategy, planning, or alignment on sales, marketing, or operational activities. These meetings are also tracked in HubSpot to ensure they are correctly categorized.

1. Under a deal, find the activity bar.



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5. **Attendees:** Ensure all attendees are logged in the CRM. For internal and external meetings, include both client and RTI participants.
6. **Meeting/Call Outcome:** For meetings, log the outcome as one of the following:
 - Scheduled
 - Completed
 - Rescheduled
 - No Show
 - Cancelled

For calls, log the outcome as one of the following:

- Busy
 - Connected
 - Left Voicemail
 - No Answer
 - Wrong Number
7. **Call/Meeting Type:** Log the time of call or meeting as one of the following:
 - Outbound sales meeting (In person)
 - Outbound sales meeting (remote)
 - Inbound sales meeting
 - Ongoing deal meeting
 - PSA meeting
 - Support meeting
 - Internal meeting
 8. **Call Direction:** When logging calls, ensure you specify whether the call was **Inbound** or **Outbound**.
 9. **Date and Time:** Log the exact date and time the activity occurred to ensure accuracy in the CRM timeline.
 10. **Text Description:** Provide a brief description of the meeting or call in the text box, summarizing key points discussed, action items, and any follow-ups required.

Other Activity Tracking Guidelines:

- **Ensure all customer interactions are recorded** in HubSpot, including calls, meetings, and emails.
- **Meetings should have proper follow-ups logged** to capture outcomes, key next steps, and timeline expectations.
- **Calls and meetings should be logged in real-time** or as soon as possible to maintain data accuracy.