



HUBSPOT CRM IMPLEMENTATION

Turning Marketing Enquiries into Qualified Sales

Industry focus: B2B Marketing & Creative Agency

BUSINESS OVERVIEW

A growing B2B marketing agency attracts potential clients through its website, downloadable guides, webinars, referrals and social media. Its challenge is to connect marketing engagement with sales conversations, maintain context across follow-ups and understand which activities generate suitable opportunities. HubSpot CRM provides a shared view of contacts, companies, deals and customer interactions.

Project snapshot

Area	Solution focus
Industry	B2B marketing and creative services
Platform	HubSpot CRM with relevant Sales and Marketing Hub capabilities, subject to licensing
Core challenge	Marketing responses, lead qualification and sales follow-ups managed across separate tools
Primary goal	Create a consistent journey from first engagement to qualified opportunity and client onboarding
Delivery approach	Discovery, pipeline design, data preparation, forms and integrations, testing, training and launch

Executive summary

The agency receives enquiries from multiple channels, but marketing and sales teams do not always share the same picture of each prospect. A contact may download a guide, attend a webinar, visit service pages and later request a proposal. If these interactions are stored in different platforms, sales representatives can miss useful context, while marketing has limited visibility into which campaigns lead to real sales conversations.

The proposed HubSpot setup centralizes contact and company records, tracks lifecycle stages, organizes deals in a defined pipeline and connects agreed forms and campaign activity to the CRM. Lead assignment, task reminders, segmented views and dashboards help the team follow a repeatable process. The specific automation and reporting features would be selected based on the HubSpot subscription and requirements.

Intended business outcome

Give marketing and sales a shared view of prospect engagement, improve lead handoffs, make deal progress easier to understand and support decisions with consistent campaign and pipeline reporting.

SOLUTION PRINCIPLE

Connect the prospect journey without overcomplicating it: capture meaningful engagement, define what makes a lead sales-ready, and give each lead a clear owner and next action.

01 | Business challenges and requirements

A service agency often has a longer consideration period than a simple online purchase. Prospects compare service packages, review case studies, consult colleagues and request proposals at different stages. Marketing needs to nurture early interest, while sales needs timely signals that a prospect is ready for a conversation.

Key challenges in the scenario

- Contact information and source details are spread across form submissions, email tools, spreadsheets and event lists.
- Marketing and sales use different definitions of a qualified lead, creating inconsistent handoffs.
- Sales representatives may not know which service pages, guides or webinars a prospect engaged with.
- Follow-up depends on manual reminders, so high-intent enquiries can wait too long for a response.
- Campaign performance is measured by clicks or form fills without a clear connection to qualified deals.
- Duplicate contacts and inconsistent company names make segmentation and reporting less reliable.
- Managers lack a consistent view of deal stages, expected close dates, proposal status and reasons for lost opportunities.

Requirements mapped to HubSpot

Requirement	Proposed approach
Central contact and company records	Organize contacts and companies with agreed properties, lifecycle stage, source and ownership.
Lead capture	Connect approved website forms and campaign landing pages to the relevant CRM records.
Lifecycle and qualification	Define subscriber, lead, marketing-qualified lead, sales-qualified lead, opportunity and customer criteria as appropriate.
Deal pipeline	Create stages aligned with discovery calls, needs assessment, proposal, negotiation and decision.
Lead handoff	Assign owners, create follow-up tasks and notify sales when agreed qualification conditions are met.
Campaign visibility	Use available campaign and source reporting to relate marketing activity to contact progression and deals.
Data governance	Define consent handling, duplicate management, property standards, access and retention requirements.

Discovery questions

Confirm the HubSpot subscription and hubs in use, current email and form tools, website platform, contact volume, consent requirements, sales process, existing data quality and the reports leadership relies on. Marketing automation, advanced attribution, custom objects and some workflow capabilities depend on the selected HubSpot tier and should be confirmed before promising them.

SUCCESS MEASURES

Agree a baseline for first-response time, lead-to-meeting conversion, qualified leads by source, deal-stage ageing, proposal conversion, data completeness and sales-team adoption.

02 | Proposed HubSpot CRM solution

The proposed design brings prospect and client information into HubSpot and establishes shared definitions for how a contact progresses from initial interest to an active sales opportunity. Use standard CRM features wherever possible and add complexity only when it supports a documented requirement.

Core CRM components

Component	Role in the agency workflow
Contacts	Maintain each prospect's details, source, lifecycle stage, owner and relevant engagement history.
Companies	Group contacts under the correct business account and provide a consolidated company view.
Deals	Track potential projects, estimated value, expected close date, pipeline stage and next action.
Activities	Log calls, meetings, emails, notes and tasks associated with contacts, companies and deals.
Forms and landing pages	Capture enquiries and campaign responses through approved website or HubSpot form pathways.
Lists and segmentation	Group contacts using appropriate properties and consent-aware criteria for relevant follow-up.
Email and marketing tools	Where licensed and configured, support campaign communication and nurture activity.
Dashboards and reports	Review lead sources, lifecycle progression, sales activity, deal stages and outcomes.

Example lifecycle and sales stages

New contact — A person submits a form, registers for an event or is entered from an approved source.

Lead — The contact matches basic fit criteria and has a legitimate reason for follow-up.

Marketing-qualified lead — The contact meets agreed fit and engagement criteria for sales review.

Sales-qualified lead — Sales confirms a relevant need, suitable organization and a reasonable next step.

Discovery / needs assessment — The team understands objectives, budget context, stakeholders and timing.

Proposal sent — Scope, deliverables, pricing and follow-up date are recorded.

Negotiation / decision — Questions, revisions, approvals and decision risks are tracked.

Customer / closed lost — The result is recorded; won deals move to onboarding, while lost deals use a consistent reason.

Website, email and other integrations

Website forms can create or update CRM records through HubSpot forms, supported integrations or approved APIs. The setup should map fields correctly, preserve source information where possible, respect consent choices and define how duplicates and failed submissions are handled. Email marketing, calendar, advertising, billing or project-management connections should be scoped after checking the current tools and available subscription features.

DATA QUALITY AND PERMISSIONS

Agree property names, required values, lifecycle rules, duplicate handling and access levels. Import only approved, cleaned data and test how existing contacts are matched before a full migration.

03 | Lead nurturing, automation and reporting

The objective is to make lead handling timely and consistent while ensuring that sales receives useful, qualified opportunities rather than every form submission. Automation should be based on transparent rules and tested against edge cases.

Illustrative lead-to-client journey

1. Capture interest

A prospect downloads a guide, registers for a webinar or submits a service enquiry. HubSpot records available source details and relevant contact information.

2. Apply fit and consent checks

The CRM applies agreed data-quality rules and respects the prospect's communication preferences before marketing follow-up.

3. Segment and nurture

Where the subscription supports it, eligible contacts receive relevant follow-up content based on their interests and lifecycle stage.

4. Identify sales readiness

Agreed fit, engagement or direct enquiry criteria flag a contact for sales review. Scoring should be used only if supported and properly configured.

5. Assign and follow up

The lead is assigned to the appropriate representative, with a task or notification to contact the prospect within the agreed response window.

6. Convert to a deal

After discovery confirms a real opportunity, the representative creates or updates a deal with value, stage, close date and next step.

7. Record outcome and learn

The team records won/lost outcomes and reasons, then reviews which lead sources and campaigns produce qualified conversations.

Automation candidates

- Notify the assigned sales owner when a high-intent service enquiry is submitted.
- Create a follow-up task when a contact becomes sales-qualified under agreed criteria.
- Set reminders for deals with no next activity or proposals awaiting a response.
- Use lifecycle-stage changes to maintain consistent handoffs between marketing and sales.
- Flag incomplete company, source or deal fields that are needed for reporting.
- Record closed-lost reasons so the team can review recurring objections and improve qualification.

Dashboard and reporting views

Report	Question it helps answer
Lead source and quality	Which sources produce leads that become qualified conversations?
Lifecycle conversion	Where do contacts progress or drop off between lifecycle stages?
Sales follow-up	Are new qualified leads contacted within the agreed timeframe?
Deal pipeline	What value sits in each stage, and which deals have stalled?
Campaign contribution	Which available campaign measures correlate with qualified deals and customers?

REPORTING NOTE

Attribution depends on tracking setup, data quality, consent and HubSpot subscription features. Define what each metric means and avoid treating clicks or form fills as proof of revenue impact.

04 | Implementation roadmap and expected outcomes

A phased implementation allows the agency to validate its lifecycle definitions, test lead routing and confirm that marketing and sales teams agree on what a qualified opportunity looks like.

Suggested delivery roadmap

Phase	Key activities	Deliverable
1. Discover	Review customer journey, sales process, marketing channels, current tools, subscription and objectives.	Approved requirements and scope
2. Define	Agree lifecycle stages, qualification criteria, properties, ownership, consent and pipeline stages.	CRM process and data design
3. Configure	Set up records, fields, views, deal pipeline, forms and available automation/reporting.	Configured HubSpot environment
4. Prepare & connect	Clean and map contacts/companies, test imports, connect approved website forms and tools.	Validated data and integrations
5. Test & train	Test form submissions, duplicates, routing, consent, workflows, permissions and reports; train users.	User acceptance sign-off
6. Launch & optimize	Go live, monitor lead handoffs, review adoption and refine rules using actual usage data.	Live CRM and improvement backlog

Expected business benefits

- A shared view of contact, company, deal and interaction history.
- Clearer agreement between marketing and sales on lead qualification and handoff.
- More consistent follow-up for relevant enquiries and active proposals.
- Improved visibility into lifecycle progression, deal stages and lead-source quality.
- Better-informed campaign planning when tracking and attribution are configured appropriately.
- A scalable foundation for future CRM, website, email and sales-process improvements.

How to evaluate results

Review performance at 30, 60 and 90 days after launch. Compare lead response time, lead-to-meeting conversion, qualified opportunities by source, deal ageing, data completeness and adoption with the baseline. Validate attribution before reporting campaign revenue, and adjust the process based on actual evidence.

Why Liyan IT Solution

Liyan IT Solution provides CRM implementation, customization, workflow automation, data migration, integration and ongoing support. We focus on aligning CRM configuration with practical business processes so teams can manage customer relationships more consistently and make better use of their data.

LET'S DISCUSS YOUR HUBSPOT REQUIREMENTS

Planning to connect marketing and sales? Share your website, lead sources, current tools and sales process. Liyan IT Solution can help define a HubSpot setup that fits your business and subscription.

Email: liyanitsolution@gmail.com | Phone: +91-9785205154, +91-8949087041

LIYAN IT SOLUTION | Your Vision, Our Tech | www.liyanitsolution.com