How to Manage Contacts and Monitor Leads in HubSpot

A Guide to Using Lifecycle Stages, Lead Statuses and Deal Stages for More Effective Lead Nurturing and Sales

Tangible Words

Every Contact Has a Place.

Tangible Words

HubSpot helps you connect to contacts you wouldn't have been able to reach using the traditional marketing processes.

That doesn't mean you abandon leads generated in other ways.

But, it does mean you need to make sure your contacts are assigned the right **Lifecycle Stage**, **Lead Stage**, and **Deal Status** so they're getting the information they need when they need it.

What You'll Learn

Managing HS Contacts With Lifecycle Stages, Lead Statuses, & Deal Stages

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- **Lifecycle Stages, Lead Statuses and Deal Stages**
  – Using Lifecycle Stages
  – Using Lead Statuses
  – Editing Lead Statuses
  – Using Deal Stages
  – Editing Deal Stages

- **Key Lifecycle Stages for Lead Nurturing**
  – Leads
  – Marketing-Qualified Leads
  – Sales-Qualified Leads

- **Using Lifecycle Stages With Workflows**
- **Next Steps**

Lifecycle Stages, Lead Statuses, and Deal Stages

Lifecycle stages are used to define where a contact is in their buyer's journey, from "subscriber" to "customer" or "evangelist." They indicate what kind of content or communication a contact needs to receive, and when.

Lead status is a sub-category in the "sales qualified lead" lifecycle stage. Lead statuses can be customized to fit the exact needs of your business.

Deal stages can be used at any lifecycle stage. When sales decides a contact is ready, they can create a deal, automatically moving the contact's lifecycle stage to "opportunity." Once a contact is an "opportunity," the deal stage property allows you to specify where they're at in the deal process. When the deal stage moves to "closed/won," their lifecycle stage will change to "customer."

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Using Lifecycle Stages

The lifecycle stage field is found in the contact record.

HubSpot automatically assigns a contact their place in the lifecycle stage. However, your sales team can identify a contact's place in the lifecycle (and enter it manually), **eliminating the chance contacts will be nurtured when they don't need to be.**

Typically, your most used lifecycle stages will be:

- Leads
- Marketing Qualified Lead (MQL), or
- Sales Qualified Lead (SQL)
- Opportunity
- Customers

Using Lead Statuses

Your salespeople can use the lead status property to let the team know if they've been in contact and whether the lead is ready to buy (or not). Appropriate tasks can then be assigned to work with the lead's status.

For example, the contact might have 'life cycle stage' of sales qualified lead (SQL), however, the lead status is 'reached out/bad timing.' The lead status lets the team know that while the lead is sales qualified, it's just not the right time to close the deal. A task can then be created for the sales team to reach out again in X number of weeks or months.

Using Lead Statuses

The lead status property is found in the contact record. Default lead statuses in HubSpot:

- New
- Open
- In Progress
- Open Deal
- Unqualified
- Attempted to Contact
- Connected
- Bad Timing

Lead statuses can also be edited to suit your process.

Editing Lead Statuses

Radio select options

LABEL	INTERNAL VALUE	CONTACTS WITH THIS...	SHOW IN FORMS
New	NEW	24	✓
Attempted to Contact	Attempted_To_CONTACT	26	✓
Lost Contact/Stopped Engaging in Sales I	Lost Contact/Stopped Eng	24	✓
Unable to Make Contact	Won't Respond	2	✓
In Early Sales Process	In Early Sales Process	31	✓
Open Deal	OPEN_DEAL	5	✓
No/Bad Fit	UNQUALIFIED	15	✓
Closed Won	Closed Won	13	✓
Closed Lost	Closed Lost	0	✓

+ Add an option   ☰ Load options...

Make sure you edit the lead status property (Contacts > Actions > Edit Properties > Lead Status) so that it suits your process.

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Using Deal Stages

Deal pipelines help visualize your sales process to predict revenue and identify selling roadblocks. Deal stages are the steps in your pipeline that flag when an opportunity is moving toward the point of closing.

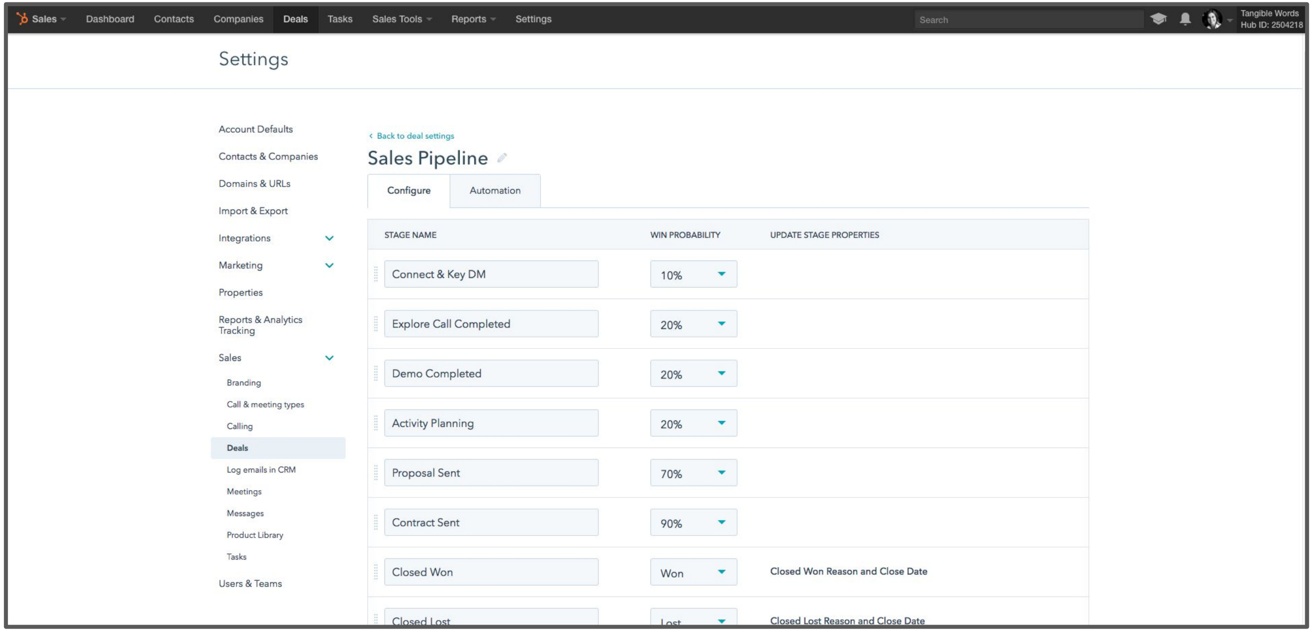
Once a contact is considered a SQL, the sales team has called and a deal is created, the lifecycle stage automatically updates to 'Opportunity.' Then, in the Deal Stage property, your team can customize stages to include updates such as 'Proposal sent' or 'SOW sent,' or Closed Won, Closed Lost, etc.

Using Deal Stages

If you have Edit property settings access in your account, you can create and edit deal pipelines and stages to suit your team's needs. Here is the default pipeline in HubSpot:

- Appointment scheduled (20%)
- Qualified to buy (40%)
- Presentation scheduled (60%)
- Decision maker bought-in (80%)
- Contract sent (90%)
- Closed won (100% Won)
- Closed lost (0% Lost)

Editing Deal Stages



Edit the **Deal stages** so they fit your process too: if it's too hard, your team won't use "Deals" (Deals > Actions > Edit Deal Stages).

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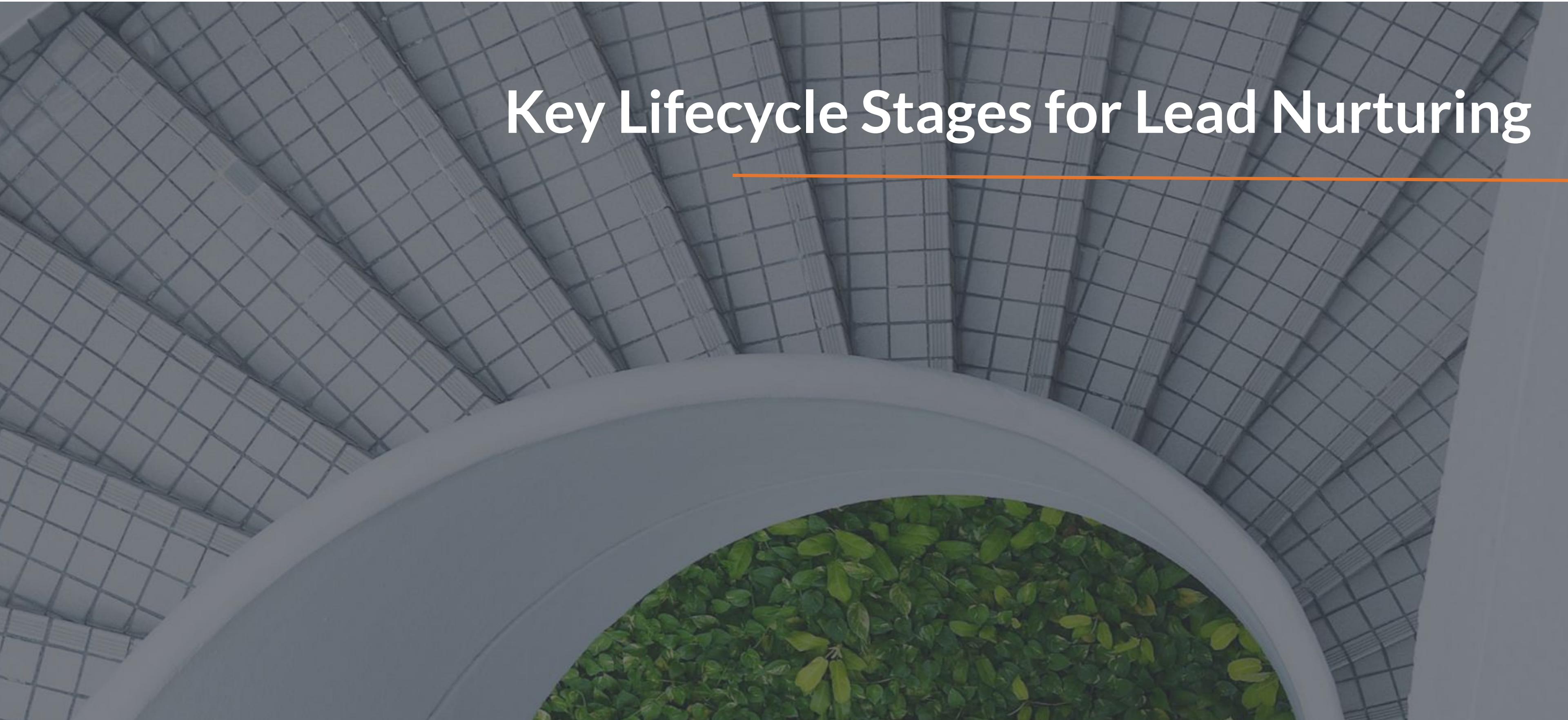
Key Lifecycle Stages for Lead Nurturing



Lifecycle Stages

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Lifecycle stages help you nurture leads throughout the buyer's journey. These three stages can be used to make sure contacts get the content — and communication — they need to make a buying decision.

➔ Leads:

New to you and they need to better understand what you do.

➔ Marketing Qualified Leads (MQLs):

They were interested enough to act on CTAs and they need nurturing.

➔ Sales-Qualified Leads (SQLs):

Ready to close the deal with some more contact from your sales team.

No Nurturing.

Let's break it down…

Leads

When a new contact is added in HubSpot, they become a "**lead**".

When a contact is a lead they can be enrolled in a **lead-specific workflow** (more information on workflows to come) and begin receiving marketing information. Their engagement will help you gage how interested they are in your company.

Marketing-Qualified Leads

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When that contact interacts with the information you send, HubSpot automatically moves the contact to “**Marketing-Qualified Lead (MQL)**”(in general, you shouldn’t move a contact from “lead” to MQL” manually).

MQLs can be enrolled in a workflow and receive more in-depth marketing information, **to see if they continue to be interested in your company** and lead them closer to a purchasing decision.

Sales-Qualified Leads

When an **MQL** has been nurtured with marketing content and your marketing team feels the contact is ready, marketing can send the contact to sales. Lead Scoring is a helpful tool for standardizing this process.

If your sales team thinks the contact is ready, they can mark the contact as an **SQL** and begin sales-specific nurturing processes. If not, sales can send the contact back to marketing for more nurturing there.

Sales-Qualified Leads

The **SQL** stage tells HubSpot that the contact has been qualified by the sales team and they don't need to be nurtured with marketing information. SQLs won't receive marketing emails from HubSpot.

Finally, after the big three nurturing stages, when your sales team creates a deal with a contact, the contact will automatically move to the **opportunity** lifecycle stage. When sales marks the deal stage as closed/won, the lifecycle stage will automatically change to **customer**.

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Using Lifecycles With Workflows

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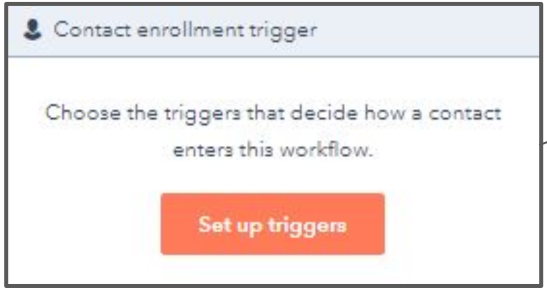
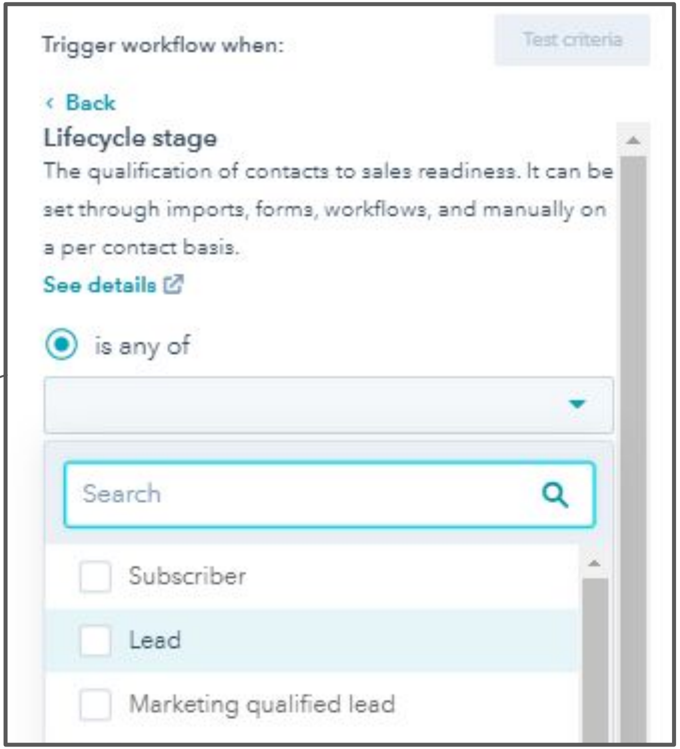
Your sales team collects contact information and HubSpot gleans more information from new contacts through workflows.

Workflows can be **triggered** based on each contact's Lifecycle Stage





Using Lifecycles with Workflows

For example, you can create marketing workflows that send a series of lead nurturing emails as soon as HubSpot marks a contact as an **MQL**.

You can also create sales processes using workflows that guide your sales team to nurture **SQLs** with personalized content.

Next Steps

Thanks for learning HubSpot with us! Still wondering where to start in organizing your content and nurturing your leads?

We can help.

Our team of copywriters, sales and marketing specialists, HubSpot experts and growth strategists can develop a customized lead nurturing and content creation plan for your business.

Book a meeting with our CEO, Alysha Dominico, to learn more.