

Create Deals when Meetings Are Booked



You will need:

- To make sure your calendar is integrated with HubSpot

Trigger

Type: Contact (Emails, Calls, and Communications)
Conditions: Meeting booked
Re-enrollment: On

Tip:

Add in your call and meeting type to only create deals for sales calls.

Tip:

Branch based on if they are an existing customer OR skip right to the Yes branch.

Type: Branch

Options: And/Or Criteria Lifecycle Stage = Customer

Tip:

Extra filters to exclude contacts that already have open deals:

Yes

None Met

Type: Create Record

Options:

- Set properties you know
- Set correct deal stage and pipeline
- Name the deal (we like to insert company name)
- Deal owner = contact owner
- Set deal amount to average deal size
- Set close date to average time to close
- Deal type = existing business

Type: Create Task

Options:

- Type: Create Record
- Options: Set properties you know
- Set correct deal stage and pipeline
- Name the deal (we like to insert company name)
- Deal owner = contact owner
- Set deal amount to average deal size
- Set close date to average time to close
- Deal type = New business

Group 1

Contact is associated to: **Any Deal**

And associated Deal has all of:

- Is Open (numeric)** is not equal to 1

OR

Group 2

Number of Associated Deals is unknown

OR

Group 3

Number of Associated Deals is equal to 0