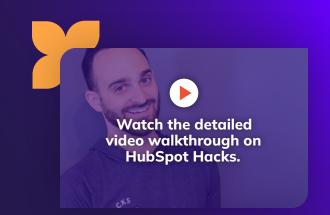


WORKFLOW GUIDE —

Create Deals when Meetings Are Booked



You will need:

 To make sure your calendar is integrated with HubSpot

Tip:

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

Trigger

Type: Contact (Emails, Calls, and Communications)

Conditions: Meeting booked

Re-enrollment: On

Type: Branch

Options: And/Or Criteria Lifecycle Stage = Customer

Yes

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

None Met

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

Tip:

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

Tip:

Extra filters to exlcude contacts that already have open deals:

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**



