

package.md

04-hubspot-path/hubspot-path-walkthrough.md

PS> boring fix lead-followup

status: practical, transparent, no hype

HubSpot Path Walkthrough

This path is for businesses that already use HubSpot or want a real CRM for follow-up.

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HubSpot Forms

→ HubSpot Contacts/Deals

→ Tasks

→ Email templates

What you will build

A HubSpot setup where a new inquiry becomes a contact or deal, gets a status/stage, triggers a follow-up task, and can use email templates for fast response.

Recommended HubSpot objects

For very small businesses:

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Contacts + Tasks

For sales pipelines:

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Contacts + Deals + Tasks

Recommended properties

Property	Object	Purpose
Service Requested	Contact or Deal	What the lead asked about
Lead Source	Contact	Where the inquiry came from
Follow-Up Status	Contact or Deal	New/responded/needs info/etc.
Next Follow-Up Date	Contact or Deal	When to follow up
Missing Info	Contact or Deal	What is needed before quote/booking
AI Summary	Contact or Deal	Optional short summary

Step 1 – Create or update the form

Use HubSpot Forms when possible. Keep fields short:

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Name

Email

Phone

Service requested

Message

Timeline

Step 2 – Map form submissions

Decide whether each submission should create:

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Contact only

Contact + Deal

If the business sells higher-ticket services, creating a deal is often cleaner.

Step 3 – Create pipeline stages

Recommended deal stages:

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New Inquiry
Responded
Needs Info
Qualified
Quoted
Booked/Won
Lost
Dormant

Step 4 – Create follow-up tasks

Create task rules such as:

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New inquiry → task due today
Responded → task due tomorrow
Quoted → task due in 2 business days
Needs Info → task due in 1 business day

Step 5 – Add email templates

Add templates for:

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Instant response
Need more info
Quote follow-up
Next-day follow-up
Final follow-up

Step 6 – Test

Submit a fake form and confirm:

- contact was created
- deal was created if using deals
- source is correct
- task was created
- template can be sent quickly

- owner can see what to do next

Common mistakes

Symptom	Likely cause	Fix
Duplicate contacts	Same person submits multiple forms	Use HubSpot duplicate management rules
No task created	Workflow not active	Turn on workflow and test enrollment
Leads disappear	No saved view/dashboard	Create a New Inquiry view
Team does not use it	Too many stages/properties	Simplify stages first

> boring systems_implementation package draft