MW Components

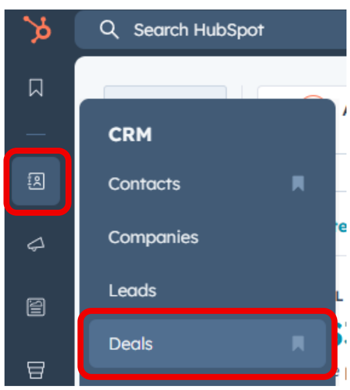
HubSpot CRM – Deals

When to Create a Deal?

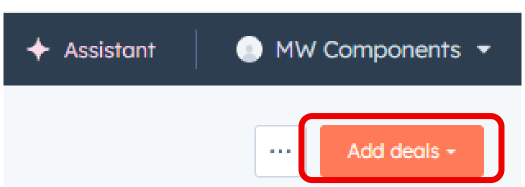
- When there is an opportunity for a New Logo
- When the opportunity is > $10K
- When there is commission potential
    - New Part or Part has not been sold in the las 2 years
    - Must be >$3K
    - Must be shipped to receive credit
    - Deal must be associated to an ERP Order

How to Create a Deal

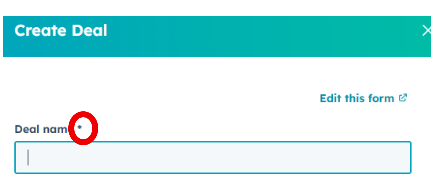
1. In the navigation bar on the left side, click the **CRM** tab and select **Deals**



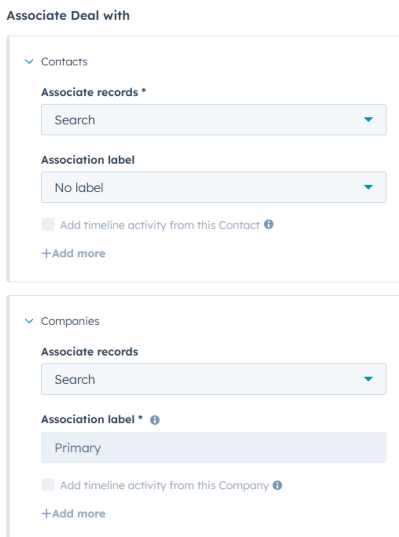
2. In the upper right corner of the Deals page, select **“Add Deals”** and choose **“Create New”**



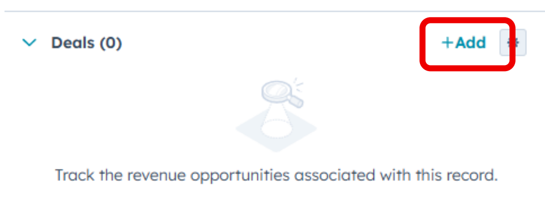
3. In the right panel that will appear enter all the details of the Deal, ensuring every field with a required * is filled out to create.

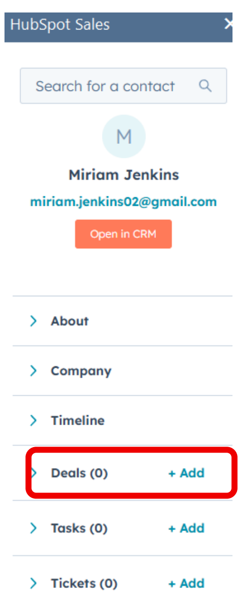


4. Below all the fields, there is an association section. Be sure to associate a Contact, as that is required, and Company if they are in our ERP.



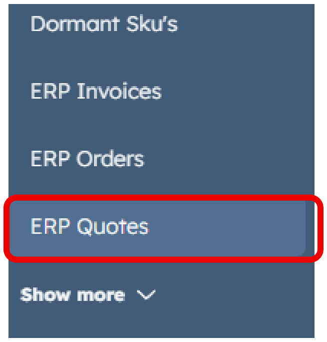
5. You can create Deal from Records (Contacts, ERP Quotes, ERP Orders, as well as the email add-in from Outlook.



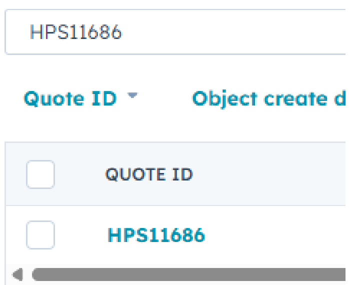


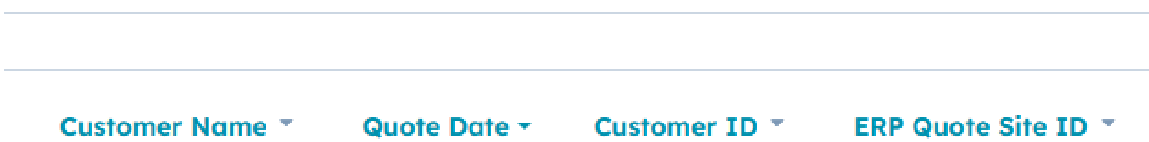
Create a Deal from ERP Quote

1. In the navigation bar on the left side, click the **CRM** tab and select **ERP Quote**

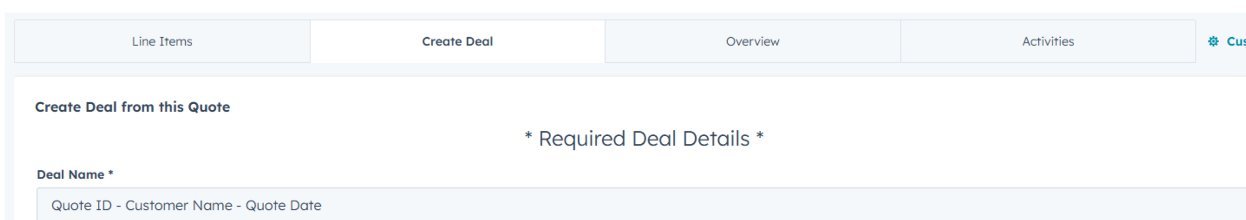


2. Search for your ERP Quote by the Quote ID, Date, Customer Name, Customer ID, ETC





3. Once on the ERP Quote Record, Create the Deal from the Create a Deal Card in the center of the ERP Quote. Just like creating a Deal from the Deal page, follow the fields required with an *.



Deal Definitions

Amount vs MASV

Amount – The total quoted value of the deal. This is the full dollar amount that the customer is expected to pay for all products or services included in the quote.

MASV – The annualized value of the deal if the customer continues to purchase at peak volume throughout the year. It reflects the long-term potential of the customer if this deal represents typical or scalable behavior.

Deal Probability vs Forecast Probability

Deal Probability – For Financial Forecasting

- Auto-set based on Deal Stage
- Used for: Financial forecasting and weighted pipeline reporting
- Standard: Each stage will have a default probability, and this field will be locked to ensure consistency

Forecast Probability – For Rep Confidence

- Manually updated by sales reps
- Used for: Gauging rep confidence and overall pipeline health
- Standard: Reps will be expected to update this as needed, particularly before escalation or deal review meetings

Weighted Amount vs Forecasted Amount

Weighted Amount

- Definition: Deal Amount × Deal Stage Probability (automated by stage)
- Purpose: Standardized forecast across pipeline

Forecasted Amount

- Definition: Deal Amount × Forecast Probability (set by rep)
- Purpose: Shows likeliness of winning deal based on BU confidence

Forecast Categories

- **Not Forecasted** – Identified Opportunity OR Closed Lost
- **Pipeline** – In Estimating OR Initial Quote Sent
- **Best Case** – Negotiation OR Final Quote Sent
- **Commit** – Pilot Production
- **Closed Won** – Closed Won