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# The PLG-to-Sales HubSpot Playbook

Playbook Visual Link: 

## How it works?

### Step 1: Map the data model

Define every object and association before building anything in HubSpot.

- Identify every entity: users, companies, product orgs, onboarding journeys.
- Define association rules between all objects.
- Build a data model diagram before implementing the data model in HubSpot.
- QA which data points actually exist in the product before designing any scoring and identify which data points can be integrated into HubSpot.

### Step 2: Build custom objects

If you need unique objects different from native HubSpot objects, build them using the custom object.

- Depending on your use case, build your product-specific object.
  - This can include: product metrics, revenue, active users.
- Set up all associations between contacts, companies, and your custom object in the **HubSpot** data model.

### Step 3: Sync product and sign-up data

Pull data into HubSpot via data pipelines (can also be custom built in-house).

- Use a sync tool for sign-up and product data.
- Use a batch sync tool for enriched product usage data from your data warehouse.
- Use **Clay** to enrich the product object:
  - Look up company domains from product object identifiers.
  - If no domain exists, enrich via the contact's work history.

- Build a QA dashboard in **HubSpot** to monitor every incoming data point for accuracy.

#### Step 4: Build a dual scoring model

Score accounts on firmographics and product signals separately.

- **Firmographic score:** ICP fit based on industry, headcount, and revenue.
- **Product object score:**
  - Tier 1 criteria met → +10 points
  - Tier 2 criteria met → +5 points
  - Disqualified → 0 points
- **Outcome:** A firmographic score and a product specific score

#### Step 5: Configure the lead pipeline

Build the lead pipeline based on the sales qualification process.

- Rename the HubSpot lead object to match your sales team's language.
- Define automated triggers that create a lead record:
  - Firmographic Tier 1 account
  - Tier 2 account stalled in onboarding with respective product criteria
- Include the creation reason in every lead name so reps know immediately why it was assigned.
- Auto-create a task for the rep on every new lead assignment.

#### Step 6: Define stage exit criteria

Using the lead pipeline, define clear entry and exit criteria per lead stage.

- Stages move automatically based on rep activity:
  - **New** → **Attempting to contact** on first outreach logged
  - **Attempting** → **Connected** on any reply received
  - **Connected** → **Qualified** when rep confirms criteria
- Qualification criteria examples could include:
  - Team size, current tooling, and champion confirmed
- Ready for deal criteria:
  - Products of interest, billing model, close date, and economic buyer confirmed

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**Step 7: Automate deal creation across 3 pipelines** Trigger deal creation the moment a lead has been qualified.

- Populate relevant qualification data from the lead to the deal.
- Route into the correct pipeline:
  - **New Business** → first deal with a new logo
  - **Existing Business** → expansion or upsell with a paying customer
  - **Renewal** → auto-created immediately on closed won
- Build respective workflows that notify reps of upcoming renewals.

**Step 8: Surface deal health automatically** Flag at-risk deals without any manual input from the rep.

- Set up **deal tags** for:
  - No activity in the last 7 days
  - Close date overdue
  - No contact associated
  - Upcoming renewal
- Add exit criteria to each deal stage so reps know exactly what to confirm before moving forward.

**Step 9: Enable outreach from the workspace** Give reps everything they need to act without leaving HubSpot.

- Connect **Gmail** and **Google Calendar** for all reps.
- Build email templates and enroll contacts into sequences
- Use **Ergo** to auto-populate deal properties from call notes and trigger stage moves after meetings.
- Log all outreach and associate it to the prospect record