Sales Funnel & CRM Workflow Map

Redacted portfolio example showing how a structured outbound sales funnel can be organized and configured in a CRM such as HubSpot.

OBJECTIVE Turn targeted prospects into qualified revenue opportunities.	**CRM STRUCTURE** Lifecycle stage + deal stage + next action.	**MANAGEMENT FOCUS** Conversion, velocity, pipeline value and forecasting.

1. Funnel Architecture

Each stage has a clear CRM status, expected activity, measurable KPI and exit criterion.

01		02		03		04		05		06
TARGET	→	**PROSPECT**	→	**ENGAGE**	→	**QUALIFY**	→	**OPPORTUNITY**	→	**CLOSE**
ICP + accounts		Contacts + data		Multi-channel		Discovery		Solution + value		Won / nurture

2. CRM Automation Layer

Lead routing Assign owner by territory, segment or account rules.	**Task creation** Trigger follow-ups when prospects engage or stages change.	**Data hygiene** Require key fields, standardize stages and flag stale records.	**Reporting** Track activity → meetings → pipeline → revenue.

3. Management Dashboard

Reply Rate	Meetings Booked	Stage Conversion	Pipeline $	Win Rate	Sales Cycle

Operating principle: The funnel is managed by outcomes, not activity alone. Activity metrics matter, but they are evaluated in context of conversion quality, pipeline creation, revenue and forecast reliability.

Stage-by-Stage CRM Setup

Example fields, sales activities, KPIs and exit criteria for a clean HubSpot-style sales process.

01 TARGET - Define ICP & Accounts

Start with a defined Ideal Customer Profile so outbound effort is concentrated on accounts with the strongest fit and revenue potential.

CRM setup
- Company size / segment
- Industry + geography
- Fit tier / account score
- Territory + account owner

Sales activities
- Define ICP criteria
- Segment target accounts
- Prioritize Tier 1-3 accounts
- Align targets to revenue goals

KPIs
- Target accounts
- ICP coverage
- Data completeness
- Account fit

Exit criteria
Account matches ICP and is prioritized for prospecting.

02 PROSPECT - Build Contact Universe

Identify the buying committee and create clean, actionable prospect records before outreach begins.

CRM setup
- Contact role / persona
- Seniority + department
- Email / phone status
- Buying committee tag

Sales activities
- Find decision-makers
- Map influencers + users
- Validate contact data
- Research trigger events

KPIs
- Contacts/account
- Valid data %
- Persona coverage
- Research complete

Exit criteria
Relevant contacts are identified and records are outreach-ready.

03 ENGAGE - Run Multi-Channel Outreach

Use coordinated email, phone and LinkedIn touches with messaging tailored to persona, pain point and business trigger.

CRM setup
- Sequence enrollment
- Last activity date
- Engagement status
- Next task date

Sales activities
- Cold email sequence
- Calls + voicemail
- LinkedIn touches
- A/B test messaging

KPIs
- Open rate
- Reply rate
- Connect rate
- Meetings booked

Exit criteria
Prospect responds, books a meeting or enters a defined nurture path.

04 QUALIFY - Discovery & Fit

Confirm business pain, impact, stakeholders, timing and a credible path to purchase before creating a qualified opportunity.

CRM setup
- Qualification fields
- Pain / use case
- Stakeholders
- Timeline + next step

Sales activities
- Discovery call
- Identify business impact
- Map decision process
- Agree next action

KPIs
- Meeting to SQL
- SQL volume
- No-show rate
- Qualification rate

Exit criteria
Problem, fit, stakeholder path and next step meet qualification standards.

05 OPPORTUNITY - Advance the Deal		
Translate discovery into a value case and manage the opportunity through evaluation, proposal and commercial alignment.	**CRM setup** • Deal amount • Close date • Deal stage • Probability / forecast	**Sales activities** • Demo / solution mapping • Build business case • Proposal + negotiation • Multi-thread stakeholders
KPIs • Pipeline $ • Stage velocity • Avg. deal size • Pipeline coverage	**Exit criteria** Commercial decision is reached with outcome recorded in the CRM.	

06 CLOSE - Win, Handoff or Nurture		
Close the loop with accurate attribution, clean handoff and structured follow-up for opportunities that are not ready today.	**CRM setup** • Closed won/lost reason • Revenue attribution • Handoff owner • Renewal / nurture date	**Sales activities** • Contract + close • Customer handoff • Loss analysis • Recycle future-fit deals
KPIs • Win rate • Revenue • Sales cycle • Forecast accuracy	**Exit criteria** Revenue is booked or a clear loss/nurture disposition is documented.	

Portfolio note: This workflow is intentionally generic and contains no client-confidential prospect, revenue, account or conversion data.