

# Sales Stage CRM Implementation Spec

Salesforce · HubSpot · Gong · Outreach - 7-Stage Configuration Guide

This spec translates the 7-Stage Sales Process into exact field configurations, stage mappings, validation rules, and reporting setup across all GTM tools. Use this document to configure or audit each system. Changes to stage definitions must cascade to all tools covered here.

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## 01 Stage Mapping Reference

7-Stage Process - Tool Mapping Matrix

STAGE #	STAGE NAME	SALESFORCE STAGE	HUBSPOT STAGE	GONG / OUTREACH SIGNAL
Stage 1	SQL	01 - SQL	Qualified	No Gong signal required
Stage 2	Discovery	02 - Discovery	Meeting Scheduled	Gong: Discovery call - Tracker: Pain questions asked >3
Stage 3	Evaluation	03 - Evaluation	Proposal Sent	Gong: Demo call flagged - Tracker: Decision criteria mentioned
Stage 4	Proposal	04 - Proposal	Decision Bought-In Maker	Gong: Proposal review call - Tracker: Pricing mentioned, champion present
Stage 5	Commit	05 - Commit	Contract Sent	Gong: Commit call - Tracker: Legal/procurement mentioned
Stage 6	Closed Won	Closed Won	Closed Won	Gong: Closed Won auto-tag
Stage 7	Closed Lost	Closed Lost	Closed Lost	Gong: Closed Lost auto-tag + reason field

### OPPORTUNITY STAGE SETTINGS & REQUIRED FIELDS

Salesforce stage names must match the 7-stage definitions exactly. Probability fields should be set to match stage win probabilities. Required fields per stage are enforced via Salesforce Path and Validation Rules.

STAGE	PROBABILITY	REQUIRED CRM FIELDS (CUMULATIVE - EACH STAGE ADDS TO PRIOR)
<b>SQL</b>	10%	Account Name, Contact Name/Title, Lead Source, ICP Score, Next Activity Date, Close Date (est.)
<b>Discovery</b>	20%	+ Pain Points (3 required), Economic Buyer (Name/Title), Decision Timeline, Discovery Notes
<b>Evaluation</b>	35%	+ Decision Criteria (3), Competitors (named), SC Assigned, Technical Validation Status
<b>Proposal</b>	55%	+ Proposal Date, Proposal Amount, Discount %, Legal Contact, Close Date (specific)
<b>Commit</b>	80%	+ Verbal Commit Date, Contract Sent Date, Legal Status, Expected Sign Date
<b>Closed Won</b>	100%	+ Contract Sign Date, ARR, Contract Length, CSM Assigned, Win/Loss Form Submitted
<b>Closed Lost</b>	0%	+ Loss Reason, Lost To, Last Stage Reached, Win/Loss Form Submitted

### VALIDATION RULES TO IMPLEMENT

**Block stage advance without required fields** On stage advance, validate required fields are populated. If empty, block save and display: 'This deal cannot advance to [Stage]. Required field [X] is missing.'

**Require Loss Reason on Closed Lost** Closed Lost stage cannot be saved without a Loss Reason and Lost To value. Error: 'Loss Reason is required to close this opportunity as Lost.'

**Alert on Commit deals >21 days** Create a Salesforce Flow that sends alert to manager when Commit-stage deal has not moved for 21+ days. Subject: 'Commit Deal Stalled: [Account Name].'

**Prevent backdating Close Date** Close Date cannot be set to a date before today once the deal has reached Commit stage. Prevents sandbagging.

## 03 HubSpot Configuration

### DEAL STAGE SETUP & REQUIRED PROPERTIES

HubSpot deal stages must be configured in the pipeline settings. Each stage requires a win probability. Required properties per stage are enforced via conditional logic on the deal record.

HUBSPOT STAGE NAME	WIN PROB.	REQUIRED DEAL PROPERTIES
Qualified	10%	Company Name, Contact, Lead Source, ICP Tier, Next Meeting Date
Meeting Scheduled	20%	Pain Points (required), Economic Buyer, Discovery Notes
Proposal Sent	35%	Decision Criteria, Competitors, SC involvement (yes/no), Demo completed
Decision Maker Bought-In	55%	Proposal sent date, Proposal ARR, Discount applied, Close date
Contract Sent	80%	Verbal commit date, Contract sent date, Legal contact, Expected close
Closed Won	100%	ARR, Contract length, CSM owner, Win/Loss reason
Closed Lost	0%	Loss reason (required), Lost to, Last stage reached before loss

### WORKFLOWS TO CREATE

**Workflows to Create** (1) Notify manager when deal age in any stage exceeds benchmark duration. (2) Auto-enroll Closed Lost deals in re-engagement sequence 180 days post-close. (3) Create task for CSM when deal moves to Closed Won. (4) Send Slack alert to RevOps when deal skips a stage (e.g., SQL -> Evaluation with no Discovery record).

## 04 Gong Configuration

### TRACKERS, SMART TAGS & STAGE SIGNALS

Gong does not hold deal stages - it signals stage health. Configure the following Trackers and Smart Tags to flag activity at each stage. Connect Gong Deals to Salesforce for bi-directional stage visibility.

TRACKER NAME	TRIGGER LOGIC	ACTION / OUTPUT
Discovery Tracker	Fires when call contains 3+ pain-related questions, mention of 'current process' or 'challenge', and budget discussed	Flags call as Discovery-complete in Gong Deals. Rep receives coaching nudge if pain not surfaced.
Evaluation Tracker	Fires when call contains decision criteria discussion, competitor mention, or technical validation language	Alerts SC + AE that Evaluation call occurred. Creates activity log in Salesforce.
Commit Risk Tracker	Fires when call in Commit stage has no mention of contract, legal, or procurement in 14+ days	Sends Slack alert to manager: 'Commit deal [X] has no legal discussion in last 14 days.'
Champion Tracker	Fires when internal champion is not present on a call after Evaluation stage	Flags multi-thread risk. Coaching recommendation: re-engage champion.
Competitive Tracker	Fires when any competitor name is mentioned on a call	Logs to CRM. Creates competitive intel report. Assigns battlecard review task to AE.

TRACKER NAME	TRIGGER LOGIC	ACTION / OUTPUT
Win/Loss Call	Smart tag applied automatically when deal moves to Closed Won or Lost	Prompts AE to complete win/loss form. Transcript saved for RevOps analysis.

## 05 Outreach / Salesloft Configuration

### SEQUENCE TRIGGERS BY STAGE

STAGE	SEQUENCE TYPE	CONFIGURATION NOTES
Stage 1 - SQL	Pre-Discovery	Standard ICP sequence. 8 steps over 14 days. Ends when discovery call is booked. Do not use generic templates - personalize steps 1, 3, and 6.
Stage 2 - Discovery	Post-Discovery follow-up	Send follow-up email within 24 hours summarizing pain points and next steps. Pause sequence - no automated touches during active Discovery.
Stage 3 - Evaluation	SC / Demo prep sequence	SC receives task to send technical prep email 48 hours before demo. Automate reference customer intro email after demo (conditional on deal score).
Stage 4 - Proposal	Proposal follow-up	Automated reminder to AE at day 3 and day 7 if no proposal response. Manager alert at day 10.
Stage 5 - Commit	Contract follow-up	Auto-reminder to buyer at day 5 if contract not signed. AE task at day 10. Manager escalation at day 14.
Stage 7 - Closed Lost	Re-engagement	Enroll in 180-day re-engagement sequence. Pause if competitor contract end date is known - time re-engagement to 60 days before renewal.

All stage names, field labels, and workflow logic must be updated in all tools simultaneously when stage definitions change. RevOps owns this spec and is responsible for keeping all tool configurations in sync. Last configuration review should be documented in the change log.