

## HubSpot Team Listing Update

I have created a filter in HubSpot to view all team members in one location for easy access to all team members. Below are the instructions.

How to create/update your team member listing HubSpot so that it shows up in the MDLV Team Filter, and will facilitate creating deals when we do business with each other.

1. Create your listing just like you would create a new listing for a new lead/prospect. Go to the Contacts link in the top left of your HubSpot screen after logging in. On the far right click on the big orange box "Create Contact."
2. Enter all the data on the create contact form with special attention to the following fields
3. **Lead Status:** Set this value to "MDLV Team". Under normal circumstances I set this value to "Lead" if I have not had a conversation with the person about our services and they do not know we want to have a conversation with them about the services. I set it to "Open" if we have already opened the conversation and they are expecting some kind of follow up from me. Doing this consistently will allow us to create better filters to segment prospects in the future.
4. **Lifecycle stage:** Set the value to "Other" (Note: We're using "other" because this is a HubSpot field that we cannot add values to. The reason for this is that the field is used in workflows, and if users add, modify or remove any of the entries it will destroy the work flows.)
5. Once you have completed the creation form, you should land on the contacts form in the "All Contacts" view. If you do not see a filter underneath the "All Contacts" view on the left, click on "All Saved Filters". Here you can add other filters to your screen for easy access.
6. Under "All Saved Filters" hover over "MDLV Team Listing" and to the right click on "Options" and select "Add to Favorites." This will put this view on your main screen. You can add other views to your main contacts screen as well. On the free version of HubSpot we can only have 5 filters under favorites.
7. Now click on the "MDLV Team Listing" and you should see all team members listed. As the list gets larger this will be important.
8. Now finish filling out your listing by going into your record and simply go down the list one by one and fill out all the information you would like for the team to have on you.

Please reach out to Stan Shields from the team listing if you have any questions.