Sola Salon Studios - Navigating At-a-Glance Lead Cards

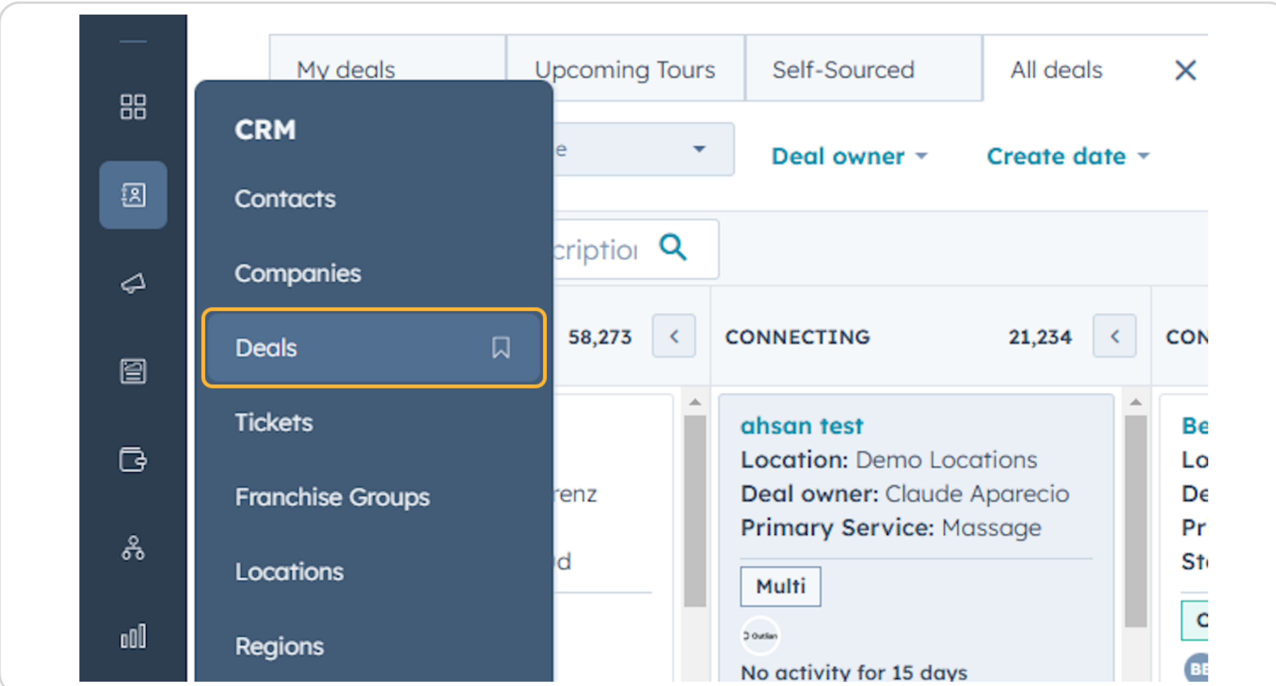
This step-by-step guide walks through navigating At-a-Glance Lead Cards. With At-a-Glance Lead Card, you get a simplified and unified workspace that helps quickly assess the status of every deal in one place. All relevant information, from lead details to next steps, is conveniently displayed.

11 Steps   [View most recent version]

Created by	Creation Date	Last Updated
Doug Davidoff	Nov 15, 2024	Jan 22, 2025

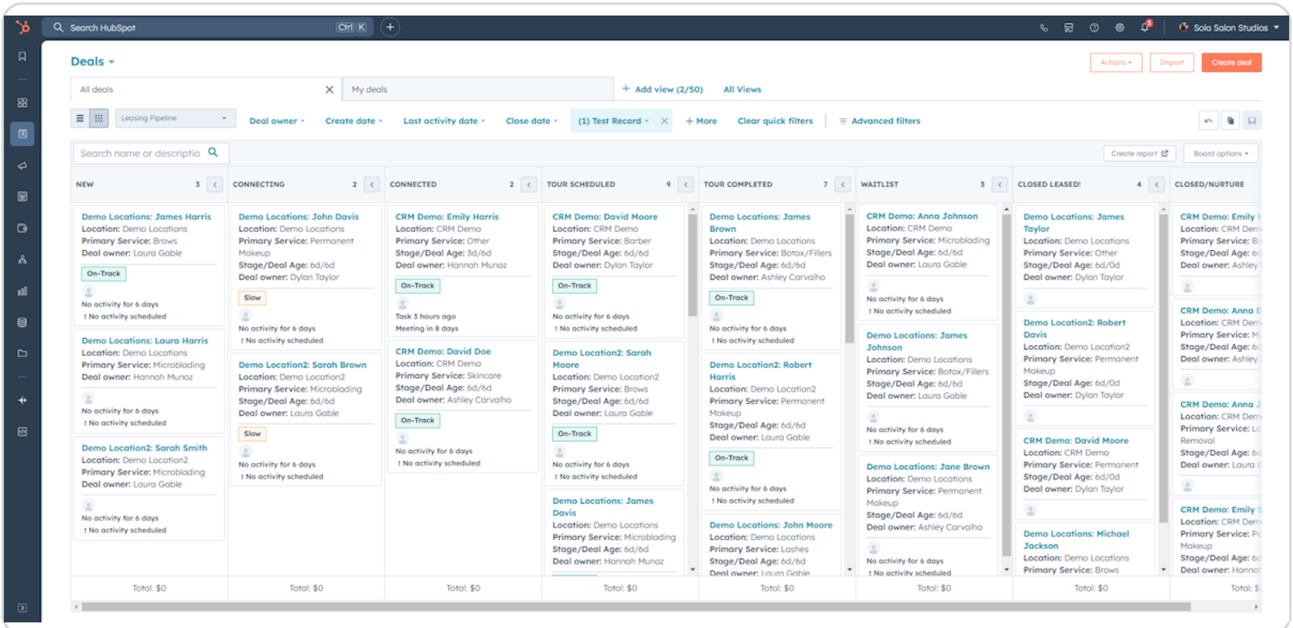
STEP 1

If you are not in Deals, go to the left-hand side navigation to the CRM section and Click Deals



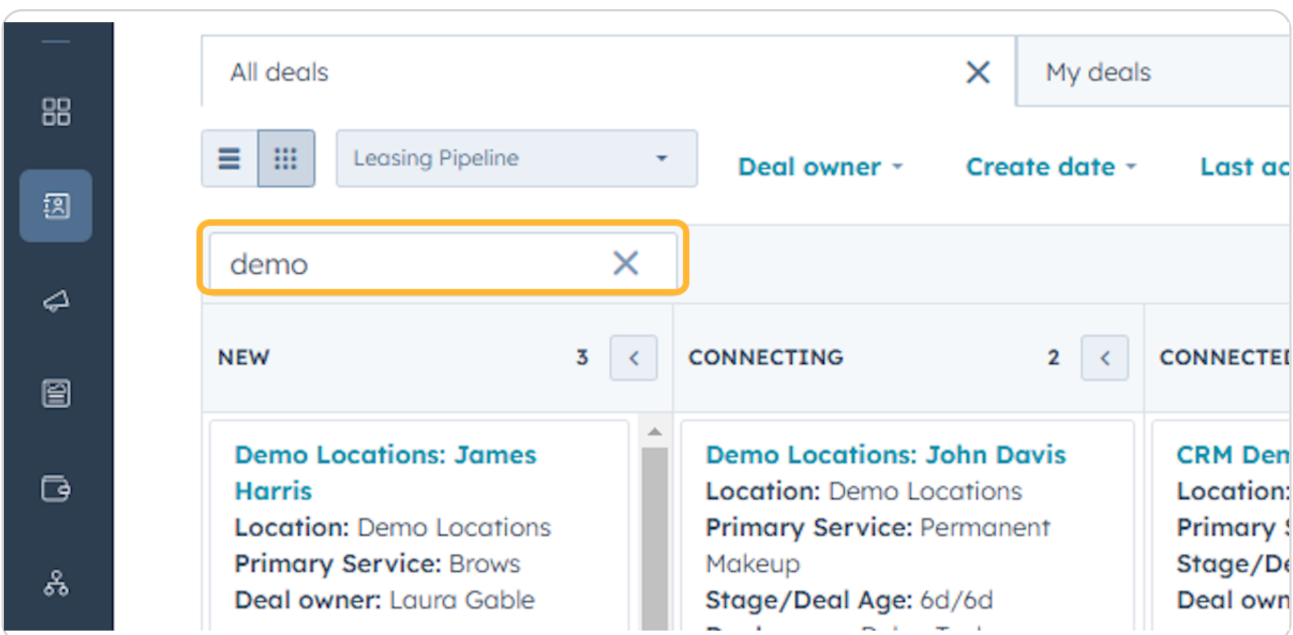
STEP 2

You'll be taken to the Deals overview page



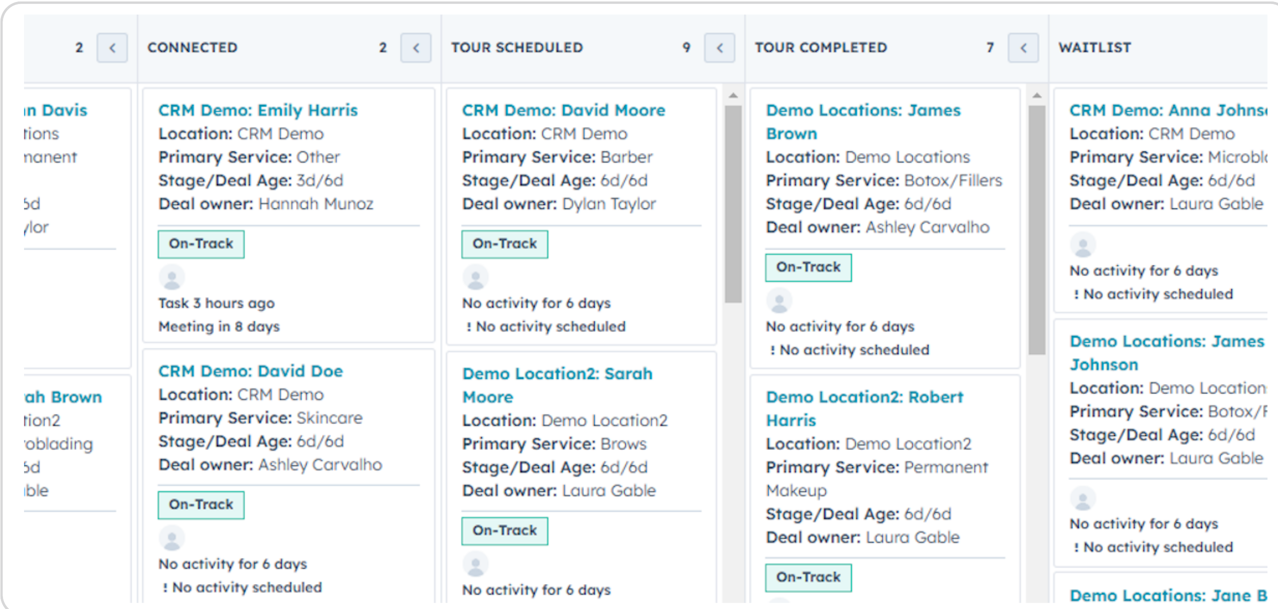
STEP 3

If you don't want to hunt for the Deal you're looking for, you can search for it



STEP 4

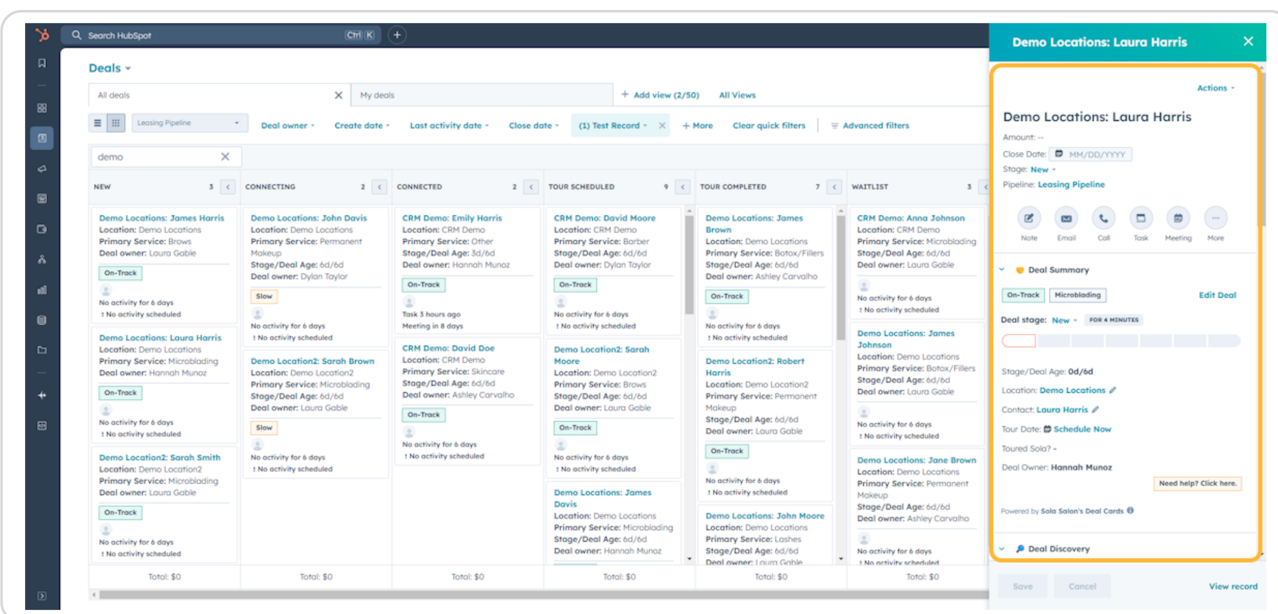
Click on the card of the Deal you want to preview



STEP 5

A preview will populate on the right-hand side

This card will give you a condensed view of lead details so you can spend less time searching for information and more time driving deals forward.

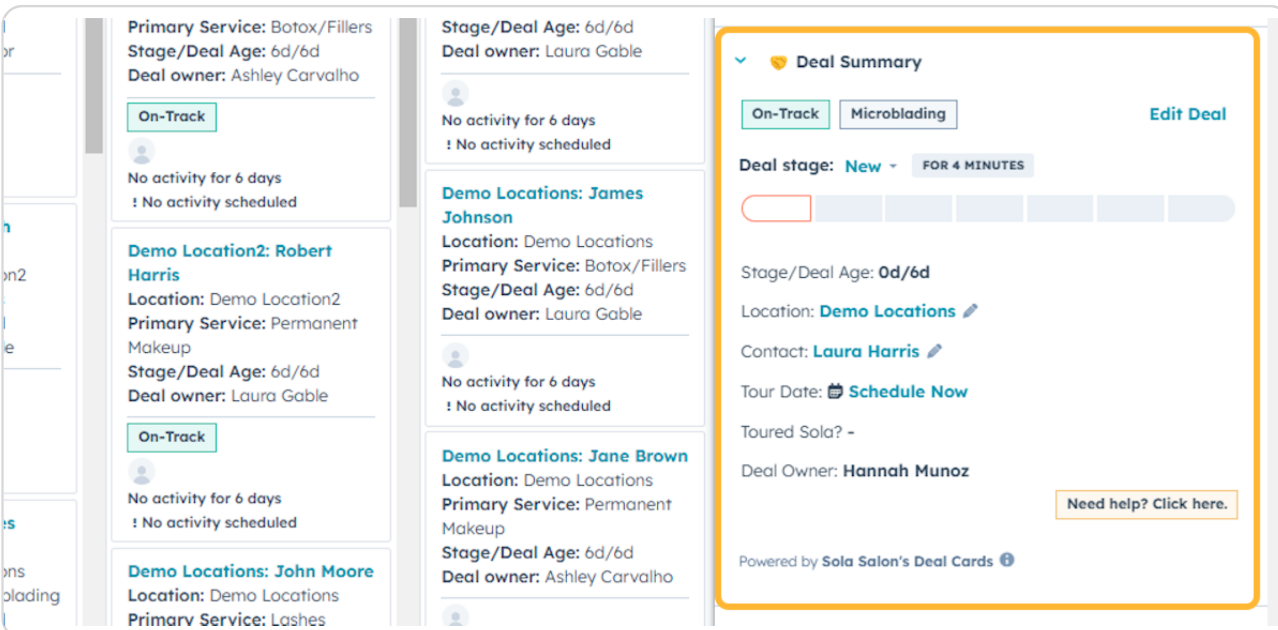


STEP 6

The Deal Summary

This section of the card will give you insight into:

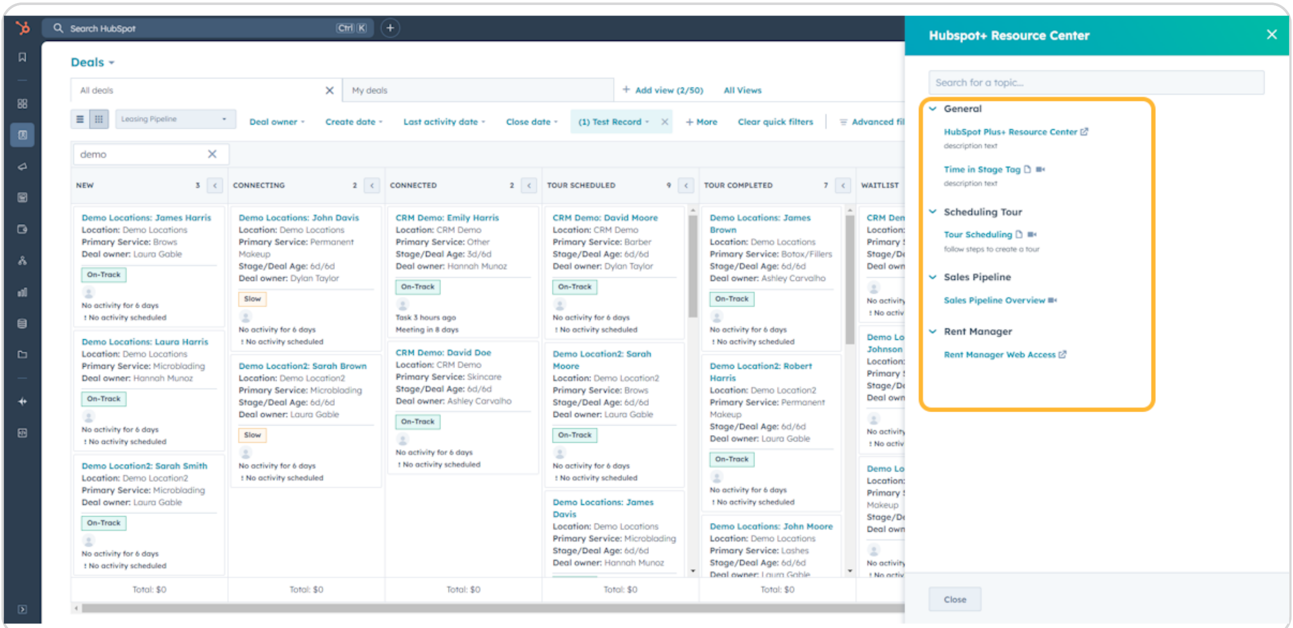
- Is the Deal on track, slow or at risk of not closing
- The primary service
- What Deal stage the Deal is in and how long it has been in that stage
- The location of the Deal
- The Pro (Contact) name
- The Tour Date if a Tour has been scheduled. If not you are able to schedule a tour straight from the card.
- If the Pro has Toured Sola
- The Deal Owner



STEP 7

If you need help, Click the Need help? Click here. button. You'll be given access to resources to help you

Note: These resources will be updated as we continue training.

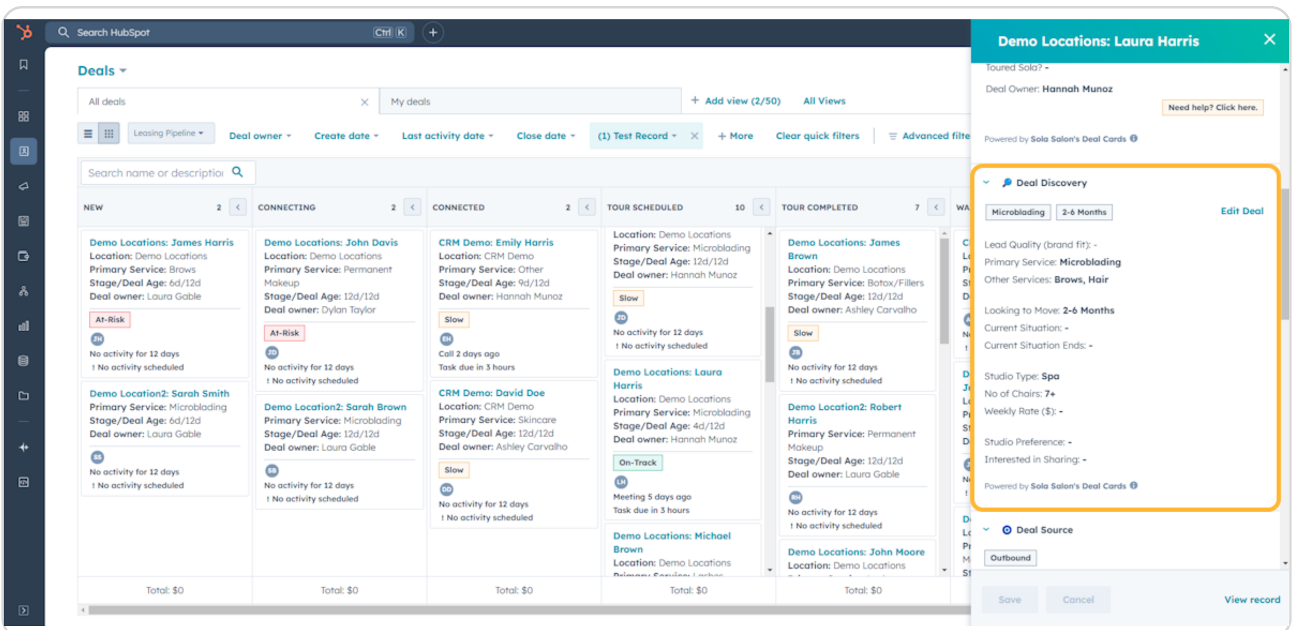


STEP 8

The Deal Discovery

This section of the card will give you insight into:

- The Primary Service
- What quality the lead is (high, medium, low)
- Other Services
- When the Pro is looking to move
- The Pro's current situation
- The Lease Renewal Date
- Insights into the Studio Type the Pro would like, the number of chairs and their Weekly Rate. Note: It's good practice to use the Weekly Rate to put revenue to the Pro.
- The Pro's Studio Preference - This will help you understand what the Pro is looking for so you can sell those features to them.
- Whether the Pro is interested in sharing space

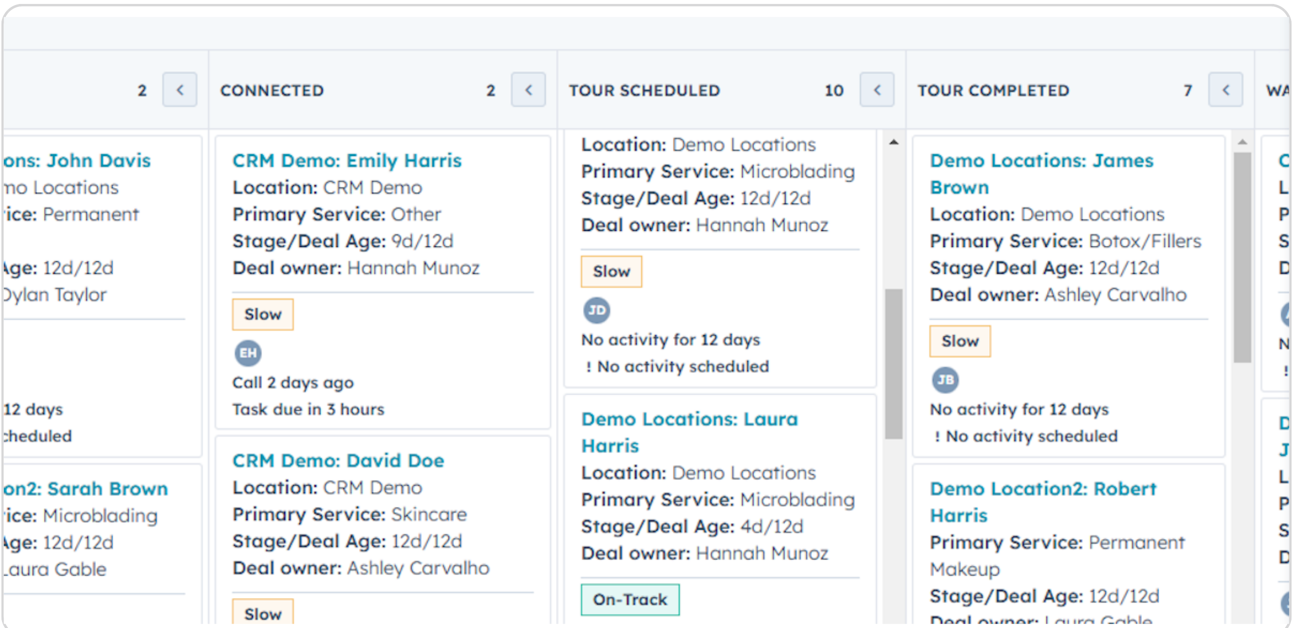


STEP 9

The Deal Source

This card section will give you insight into:

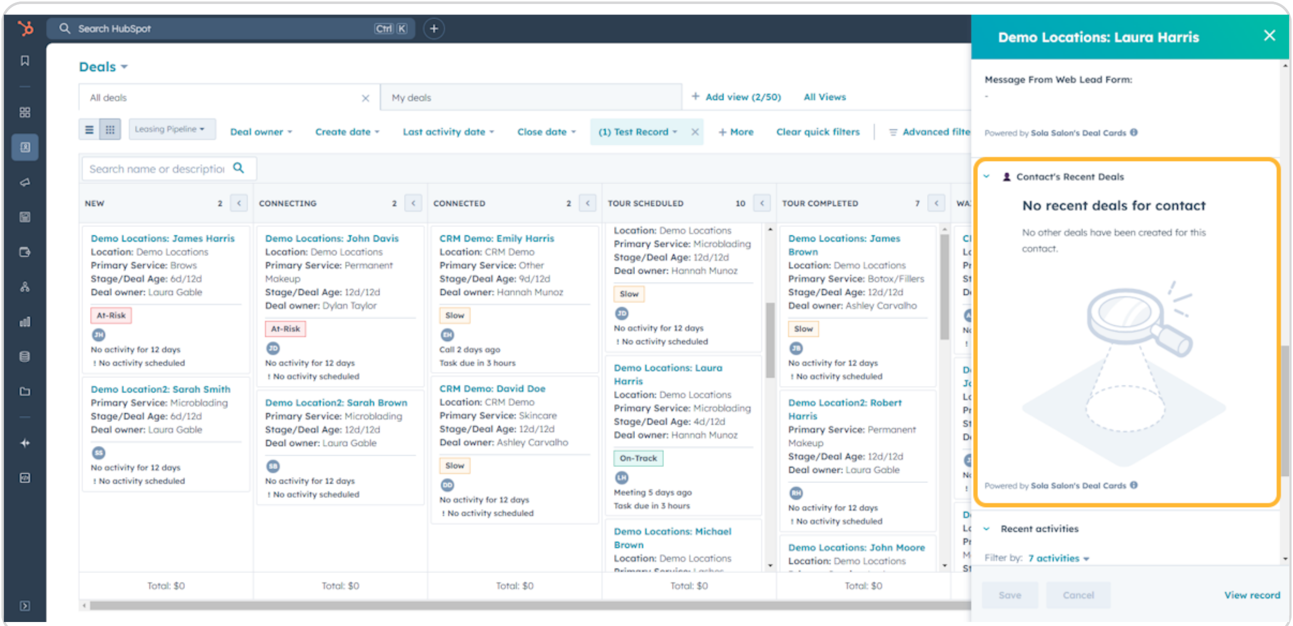
- Where the Deal/Pro came from - whether it was an Inbound lead through organic or paid or an Outbound lead through self-sourced locations.
- The Origin of the Deal - If this shows as HubSpot CRM, that means the Deal was self-sourced
- The Source of the Deal - whether the Deal came from Google Search, Ads, etc.
- If the Deal came from a Campaign, you'll see the campaign and information on the Landing Page and Lead Form where they submitted along with a Message From Web Lead Form if applicable.
- When the Deal was created



STEP 10

The Contact's Recent Deals

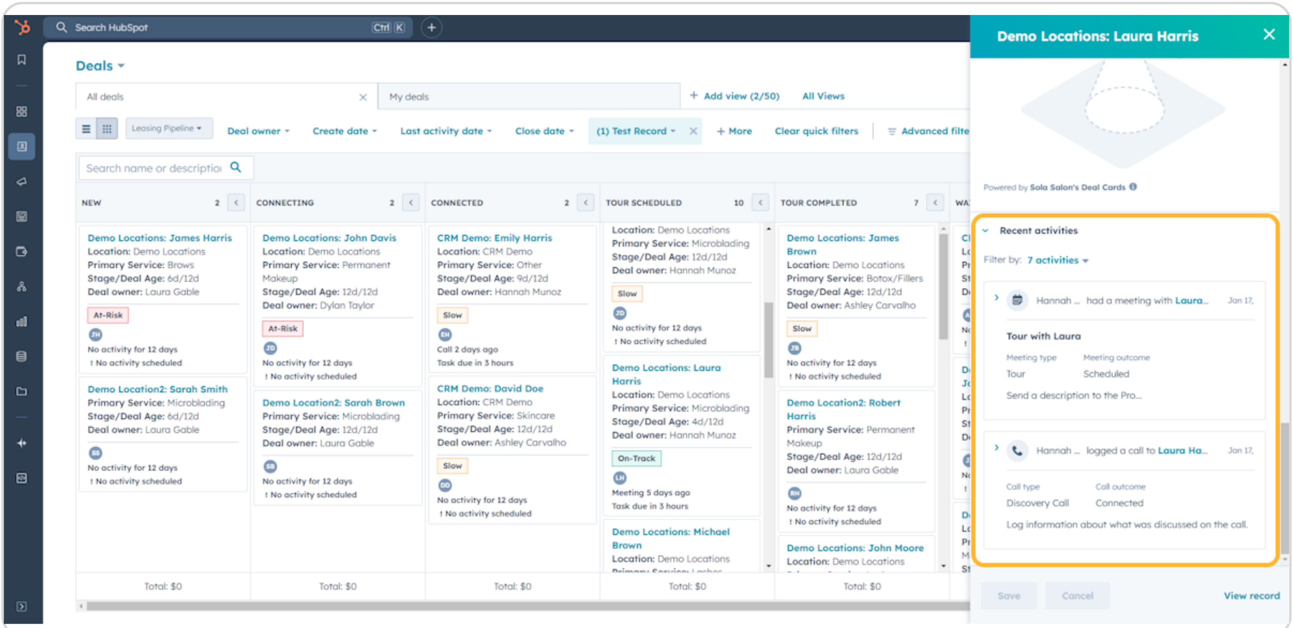
This section will show you any recent Deals the Pro has been part of if applicable.



STEP 11

The Deal's Recent Activities

This section will give you insight into a few of the Deal's Recent Activities, showing what communication and actions have been taken to move the Deal forward.



At-a-Glance Lead Cards are a one-stop place for you to gain insights and streamline your follow-up process. For example, if there is information missing, you can utilize that knowledge to drive the next conversation with a Pro.

LIFT Enablement