

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

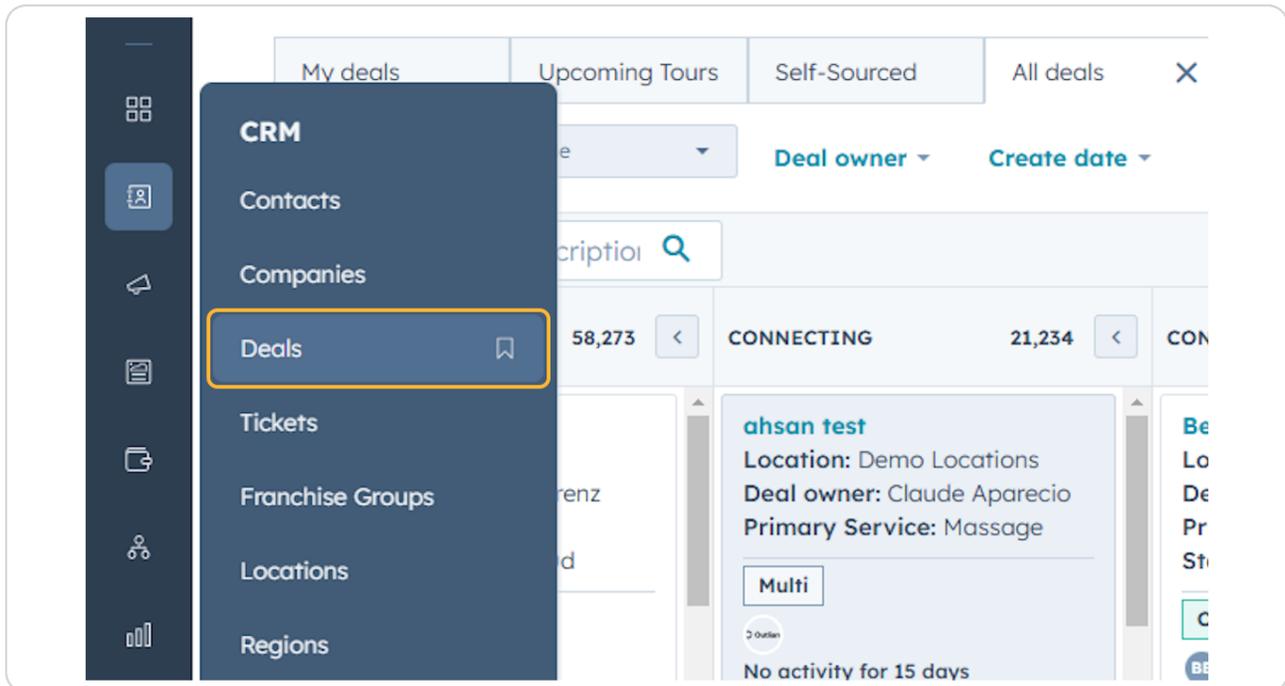
This step-by-step guide walks through navigating At-a-Glance Lead Cards. With At-a-Glance Lead Card, you get a simplified and unified workspace that helps quickly assess the status of every deal in one place. All relevant information, from lead details to next steps, is conveniently displayed.

11 Steps [View most recent version](#) 

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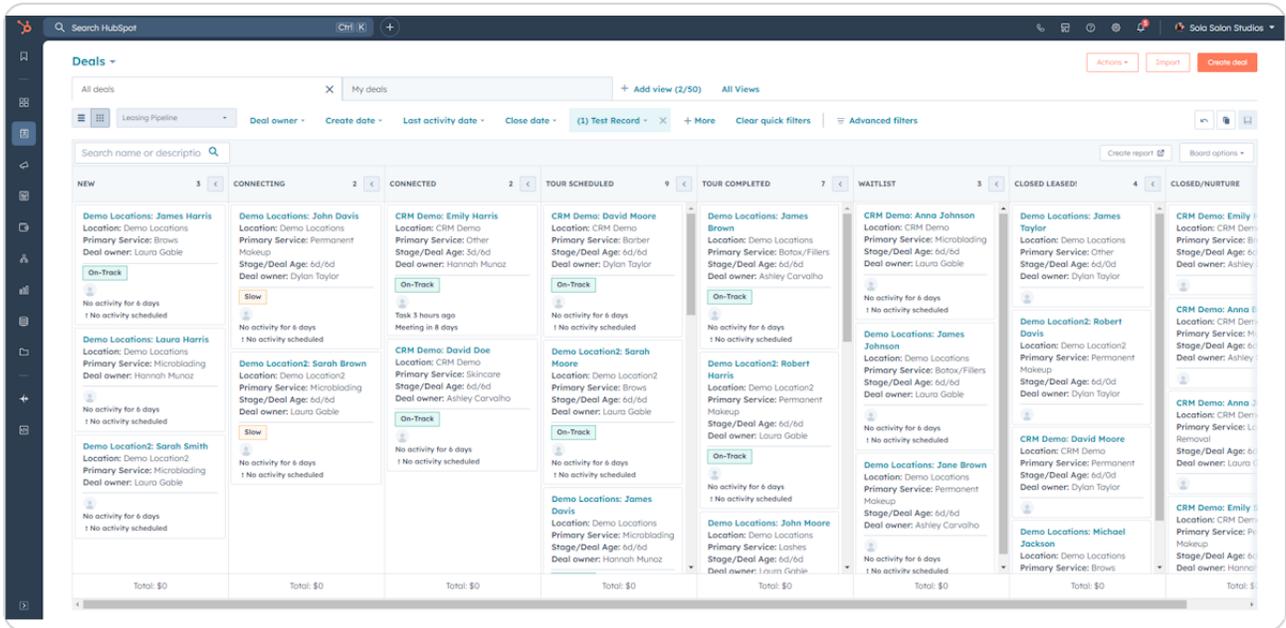
STEP 1

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



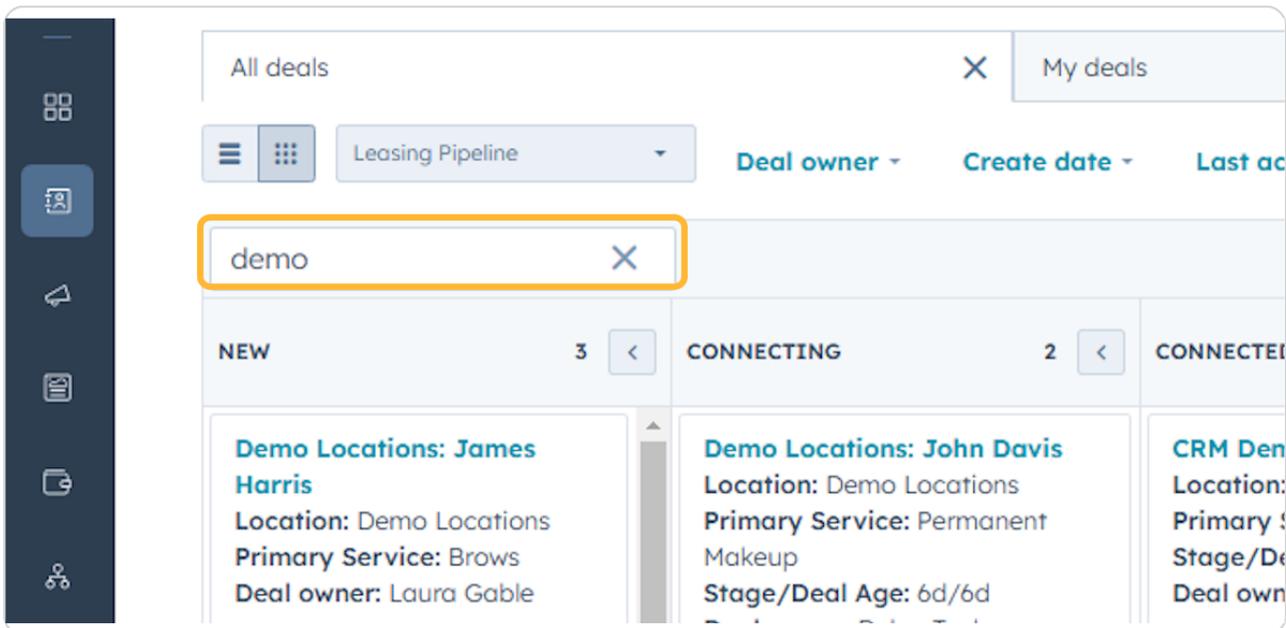
STEP 2

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

The screenshot shows a CRM deal pipeline with five columns: CONNECTED (2 deals), TOUR SCHEDULED (9 deals), TOUR COMPLETED (7 deals), and WAITLIST. Each deal card displays the deal name, location, primary service, stage/deal age, and deal owner. Status indicators like 'On-Track' or 'No activity for 6 days' are visible on each card.

Stage	Deal Name	Location	Primary Service	Stage/Deal Age	Deal Owner	Status
CONNECTED	CRM Demo: Emily Harris	CRM Demo	Other	3d/6d	Hannah Munoz	On-Track
	CRM Demo: David Doe	CRM Demo	Skincare	6d/6d	Ashley Carvalho	No activity for 6 days
TOUR SCHEDULED	CRM Demo: David Moore	CRM Demo	Barber	6d/6d	Dylan Taylor	No activity for 6 days
	Demo Location2: Sarah Moore	Demo Location2	Brows	6d/6d	Laura Gable	No activity for 6 days
TOUR COMPLETED	Demo Locations: James Brown	Demo Locations	Botox/Fillers	6d/6d	Ashley Carvalho	No activity for 6 days
	Demo Location2: Robert Harris	Demo Location2	Permanent Makeup	6d/6d	Laura Gable	No activity for 6 days
WAITLIST	CRM Demo: Anna Johnson	CRM Demo	Microblading	6d/6d	Laura Gable	No activity for 6 days
	Demo Locations: James Johnson	Demo Location	Botox/f	6d/6d	Laura Gable	No activity for 6 days

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.

The screenshot shows the same CRM deal pipeline as in Step 4, but with a detailed preview overlay for the deal 'Demo Locations: Laura Harris'. The preview includes fields for Amount, Close Date, Stage, Pipeline, Deal Summary, Deal stage, Stage/Deal Age, Location, Contact, Tour Date, and Deal Owner. It also features a 'Need help? Click here.' link and 'Save', 'Cancel', and 'View record' buttons.

Field	Value
Amount	--
Close Date	MM/DD/YYYY
Stage	New
Pipeline	Leasing Pipeline
Deal Summary	On-Track Microblading
Deal stage	New FOX 6 MINUTES
Stage/Deal Age	0d/6d
Location	Demo Locations
Contact	Laura Harris
Tour Date	Schedule Now
Toured Sold?	
Deal Owner	Hannah Munoz

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

The screenshot displays a deal card interface with the following components:

- Primary Service:** Botox/Fillers
- Stage/Deal Age:** 6d/6d
- Deal owner:** Ashley Carvalho
- Status:** On-Track
- Activity:** No activity for 6 days, No activity scheduled
- Demo Location 2:** Robert Harris
- Location:** Demo Location2
- Primary Service:** Permanent Makeup
- Stage/Deal Age:** 6d/6d
- Deal owner:** Laura Gable
- Status:** On-Track
- Activity:** No activity for 6 days, No activity scheduled
- Demo Locations:** John Moore
- Location:** Demo Locations
- Primary Service:** Lashes
- Stage/Deal Age:** 6d/6d
- Deal owner:** Ashley Carvalho
- Activity:** No activity for 6 days, No activity scheduled

The **Deal Summary** section includes:

- Deal Summary** (with a heart icon)
- Status:** On-Track, Microblading
- Edit Deal** (button)
- Deal stage:** New (dropdown), FOR 4 MINUTES
- Progress bar:** A bar with 10 segments, the first is highlighted in red.
- Stage/Deal Age:** 0d/6d
- Location:** Demo Locations (with edit icon)
- Contact:** Laura Harris (with edit icon)
- Tour Date:** Schedule Now (with calendar icon)
- Toured Sola?:** -
- Deal Owner:** Hannah Munoz
- Need help? Click here.** (button)
- Powered by Sola Salon's Deal Cards** (with info icon)

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.

The screenshot displays the HubSpot CRM interface. On the left, a sidebar contains navigation icons. The main area shows a 'Deals' pipeline with columns for 'NEW', 'CONNECTING', 'CONNECTED', 'TOUR SCHEDULED', 'TOUR COMPLETED', and 'WAITLIST'. Each column contains deal cards with details like location, primary service, and deal owner. A 'Hubspot+ Resource Center' overlay is visible on the right, featuring a search bar and a list of resource categories: General, Scheduling Tour, Sales Pipeline, and Rent Manager. The 'General' category is highlighted with an orange box, and the 'HubSpot Plus+ Resource Center' link is also highlighted.

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

The screenshot displays the HubSpot CRM 'Deals' pipeline. The main view shows a table of deals categorized by stage: NEW (2), CONNECTING (2), CONNECTED (2), TOUR SCHEDULED (10), and TOUR COMPLETED (7). Each deal card includes details such as the deal name, location, primary service, stage/deal age, and deal owner. A 'Deal Discovery' popup is open on the right, highlighting specific deal details for a deal named 'Demo Locations: Laura Harris'. The popup includes fields for 'Lead Quality (brand fit)', 'Primary Service: Microblading', 'Other Services: Brows, Hair', 'Looking to Move: 2-6 Months', 'Current Situation', 'Studio Type: Spa', 'No of Chairs: 7+', 'Weekly Rate (\$):', 'Studio Preference', and 'Interested in Sharing:'. The popup also shows the deal owner as 'Laura Goble' and is powered by 'Sola Salon's Deal Cards'.

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

The screenshot displays a CRM dashboard with four columns representing deal stages: CONNECTED (2 deals), TOUR SCHEDULED (10 deals), TOUR COMPLETED (7 deals), and a partially visible WA column. Each deal card provides details such as the deal name, location, primary service, stage/deal age, and deal owner. Activity status is indicated by colored boxes (Slow, On-Track) and activity logs.

CONNECTED	TOUR SCHEDULED	TOUR COMPLETED
Deal 1: Name: John Davis Location: Demo Locations Primary Service: Permanent Stage/Deal Age: 12d/12d Deal owner: Dylan Taylor Activity: 12 days scheduled	Deal 1: Name: CRM Demo: Emily Harris Location: CRM Demo Primary Service: Other Stage/Deal Age: 9d/12d Deal owner: Hannah Munoz Activity: Slow No activity for 12 days ! No activity scheduled	Deal 1: Name: Demo Locations: James Brown Location: Demo Locations Primary Service: Botox/Fillers Stage/Deal Age: 12d/12d Deal owner: Ashley Carvalho Activity: Slow No activity for 12 days ! No activity scheduled
Deal 2: Name: Sarah Brown Location: CRM Demo Primary Service: Microblading Stage/Deal Age: 12d/12d Deal owner: Laura Gable	Deal 2: Name: Demo Locations: Laura Harris Location: Demo Locations Primary Service: Microblading Stage/Deal Age: 4d/12d Deal owner: Hannah Munoz Activity: On-Track	Deal 2: Name: Demo Location2: Robert Harris Location: Demo Locations Primary Service: Permanent Makeup Stage/Deal Age: 12d/12d Deal owner: Laura Gable

STEP 10

The Contact's Recent Deals

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

The screenshot displays the HubSpot CRM interface. The main view is a deals pipeline with columns: NEW (2), CONNECTING (2), CONNECTED (2), TOUR SCHEDULED (10), and TOUR COMPLETED (7). Each deal card shows details like name, location, primary service, stage/deal age, and deal owner. A popup window titled "Demo Locations: Laura Harris" is open on the right, showing a "Message From Web Lead Form" and a "Contact's Recent Deals" section. The "Contact's Recent Deals" section displays the message "No recent deals for contact" with a magnifying glass icon and a note: "No other deals have been created for this contact." Below this, there is a "Recent activities" section with a filter set to "7 activities".

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.

The screenshot displays the HubSpot Deals interface. The main area shows a grid of deal cards categorized by status: NEW (2), CONNECTING (2), CONNECTED (2), TOUR SCHEDULED (10), and TOUR COMPLETED (7). Each card provides details such as location, primary service, stage/deal age, and deal owner. A sidebar on the right, titled 'Demo Locations: Laura Harris', shows 'Recent activities' for 7 activities. The activities include a meeting with Laura on Jan 17 and a call to Laura on Jan 17. The sidebar also includes a 'View record' button.

i 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.

