

# Sola Salon Studios - Understanding Closed/Nurture Reasons

This step-by-step guide will walk you through the different closed lost reasons on a Deal. If you move a Deal to Closed/Nurture, this guide explains each reason option and shows what details you should enter for each specific reason.

32 Steps [View most recent version](#) 

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# # Login to HubSpot and Access Deals

2 Steps

## STEP 1

**Hover over the CRM section in the navigation to the left and Click on Deals**

The screenshot displays the HubSpot CRM interface with a grid of deal cards. At the top, there are filter tabs: '14,553' (selected), 'CONNECTED 8,129', 'TOUR SCHEDULED 924', 'TOUR COMPLETED 1,080', and 'WA'. The deal cards are organized into columns. The first column shows deal details for 'Self Test' (On-Track) and 'Testing 123' (At-Risk). The second column shows 'Erin Hubspot' (At-Risk) and 'Manual Test - No Email' (At-Risk). The third column shows 'Eddie Alvarez (Eddie the Barber)' (No activity for a month) and 'Leslie Martinez' (No activity for a month). Each card includes fields for Location, Deal owner, Primary Service, and Stage/Deal Age. Status indicators like 'On-Track', 'At-Risk', and 'No activity for a month' are highlighted with colored boxes. Activity history is shown below each card, such as 'Meeting 11 days ago'.

## STEP 2

You'll be taken to the Deals index page

The screenshot displays the HubSpot Deals index page. At the top, there's a search bar and navigation tabs for 'My deals', 'Upcoming Tours', 'Self-Sourced', 'All deals', 'On-Track', 'At-Risk', 'Slow', and 'Online Deals'. Below this, there are filters for 'Leasing Pipeline', 'Deal owner', 'Create date', 'Last activity date', and 'Close date'. The main area is a Kanban board with columns for deal stages: NEW (35,473), ATTEMPTING (14,553), CONNECTED (8,129), TOUR SCHEDULED (924), TOUR COMPLETED (1,080), and WAITLIST. Each column contains deal cards with details like name, location, deal owner, primary service, and stage/deal age. For example, in the 'NEW' column, there are deals like 'Hannah Test' and 'BLAH - BLAH'. In the 'ATTEMPTING' column, there are 'Gregory Manualcreation' and 'Vixen Tarot'. The 'CONNECTED' column has 'Self Test' and 'Testing 123'. 'TOUR SCHEDULED' includes 'Erin Hubspot' and 'Manual Test - No Email'. 'TOUR COMPLETED' shows 'Eddie Alvarez (Eddie the Barber)' and 'Leslie Martinez'. The 'WAITLIST' column has 'Harry St' and 'Carmen'. At the bottom of each column, there's a 'Total' value.

## # Updating the Deal stage to Closed/Nurture

8 Steps

### STEP 3

#### Search for the Deal you need to update

0 <	CONNECTED	0 <	TOUR SCHEDULED	0 <	TOUR COMPLETED	0 <	WAITLIST

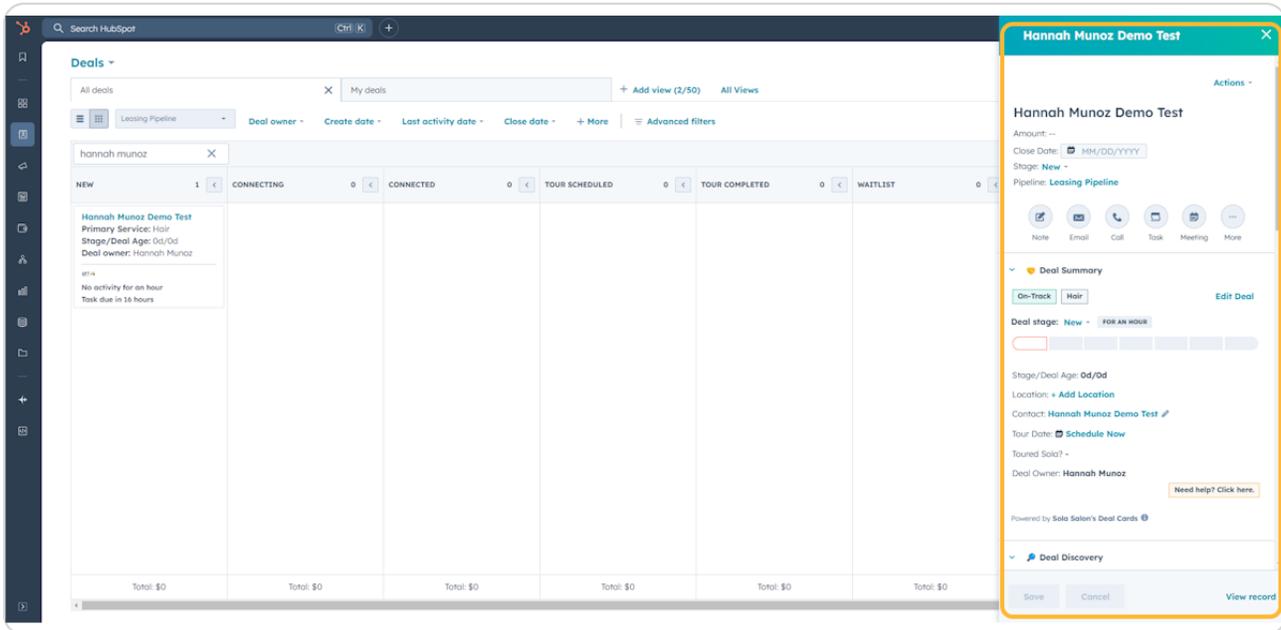
### STEP 4

#### Click in the Deal card

The screenshot shows a CRM interface with a search bar containing 'hannah munoz'. Below the search bar, a table displays deal stages: NEW (1 <), CONNECTING (0 <), CONNECTED (0 <), and TOUR SCHEDULED. A deal card for 'Hannah Munoz Demo Test' is highlighted with an orange border. The card details include: Primary Service: Hair, Stage/Deal Age: 0d/0d, Deal owner: Hannah Munoz, No activity for an hour, and Task due in 16 hours.

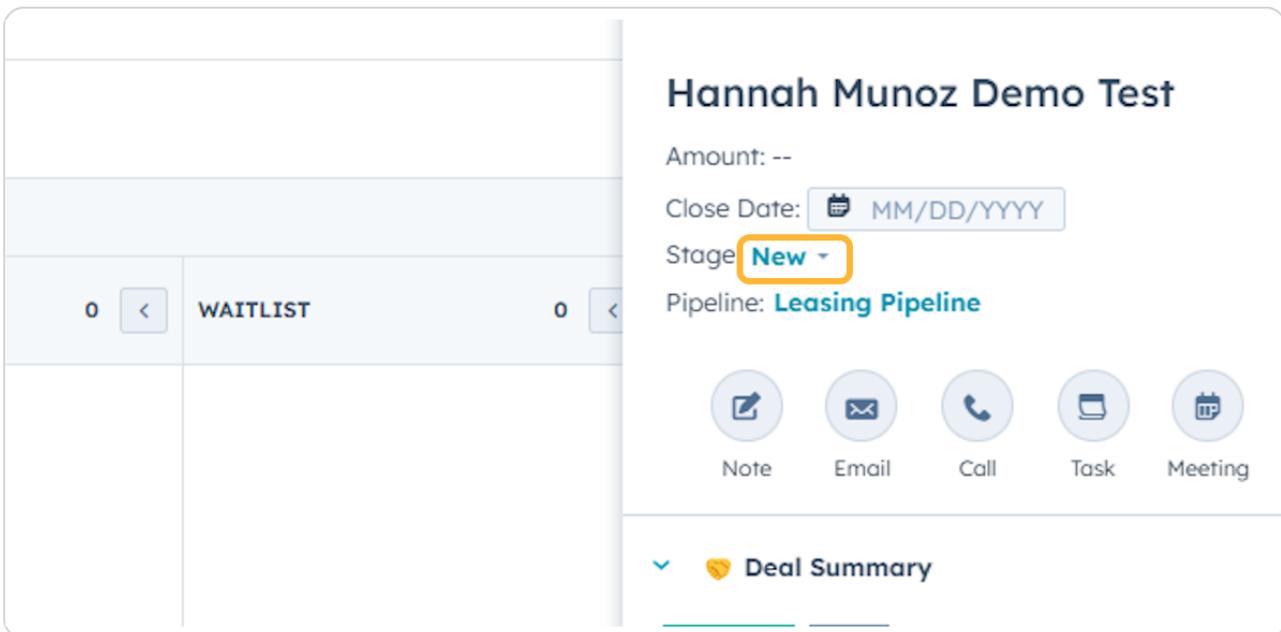
## STEP 5

The Deal preview will appear



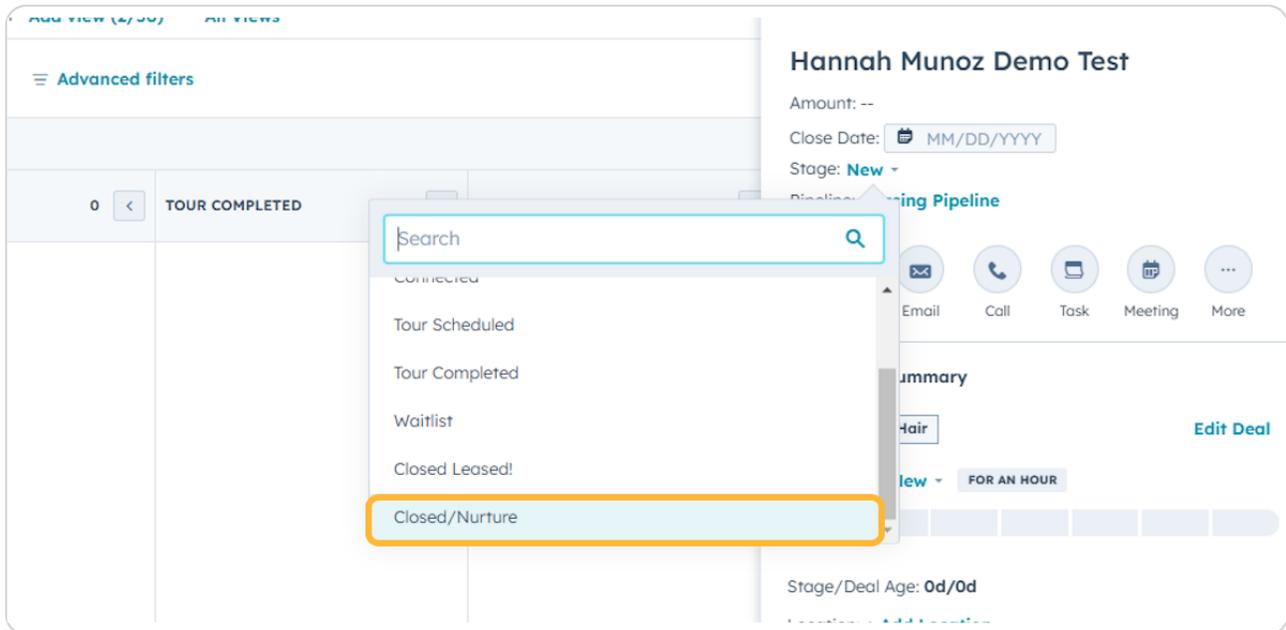
## STEP 6

Towards the top of the preview next to Stage, Click the Stage dropdown



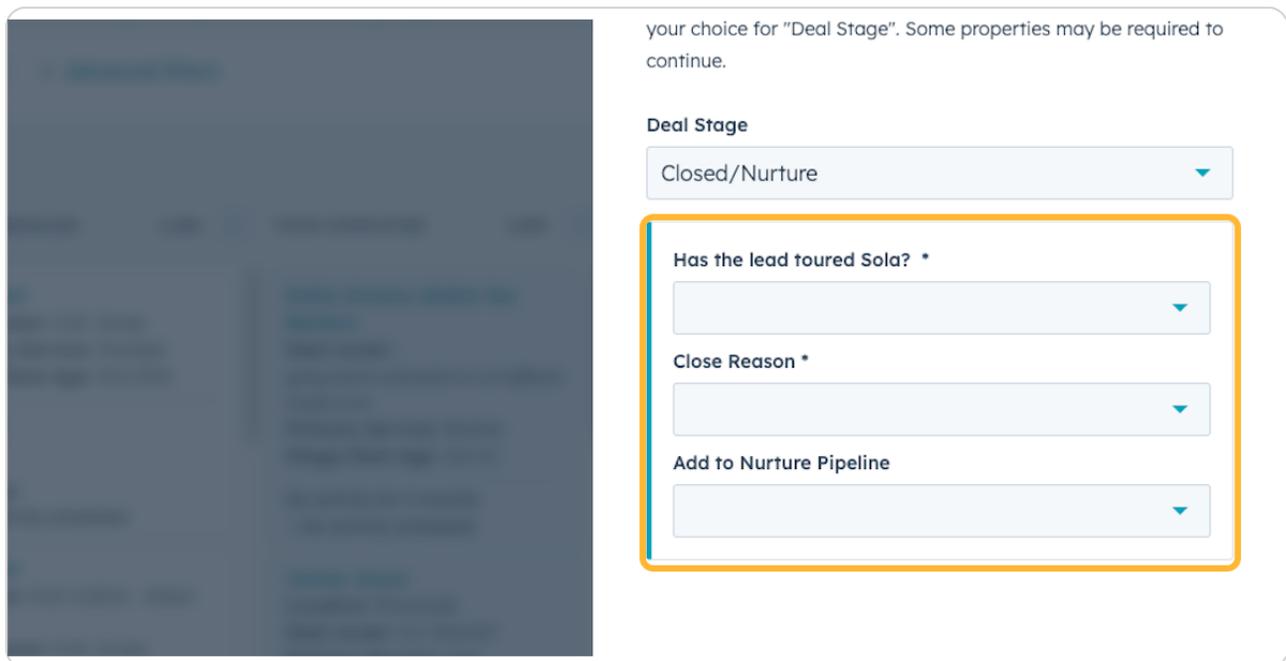
## STEP 7

### Click on Closed / Nurture



## STEP 8

### Select an answer to Has the lead toured Sola?



**STEP 9**

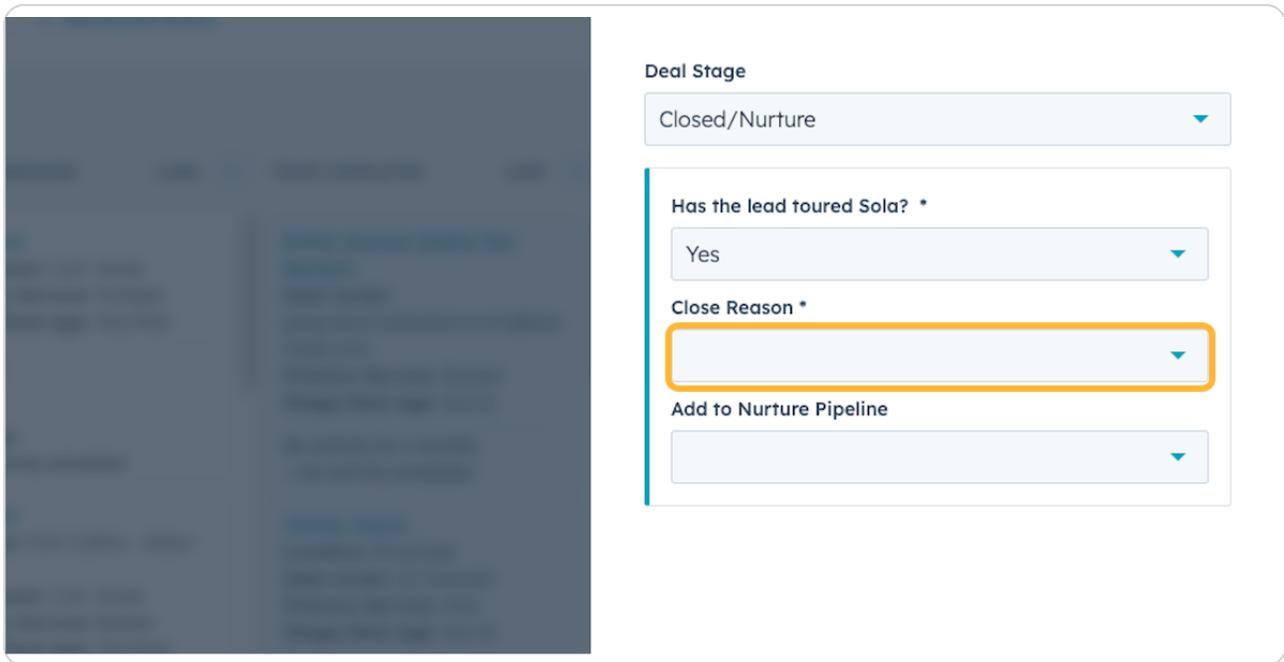
**For guide purposes I chose yes. Your options will be Yes or No.**



## STEP 10

### Click on and choose a Close Reason

Note: Some Close Reasons are conditional and will have more information for you to fill out when selected.



The image shows a screenshot of a CRM form. On the left, there is a blurred sidebar. On the right, the form fields are visible. The 'Deal Stage' dropdown is set to 'Closed/Nurture'. Below it, the 'Has the lead toured Sola?' dropdown is set to 'Yes'. The 'Close Reason' dropdown is highlighted with an orange border, indicating it is the current step. Below that is the 'Add to Nurture Pipeline' dropdown.

Deal Stage  
Closed/Nurture

Has the lead toured Sola? \*  
Yes

Close Reason \*

Add to Nurture Pipeline

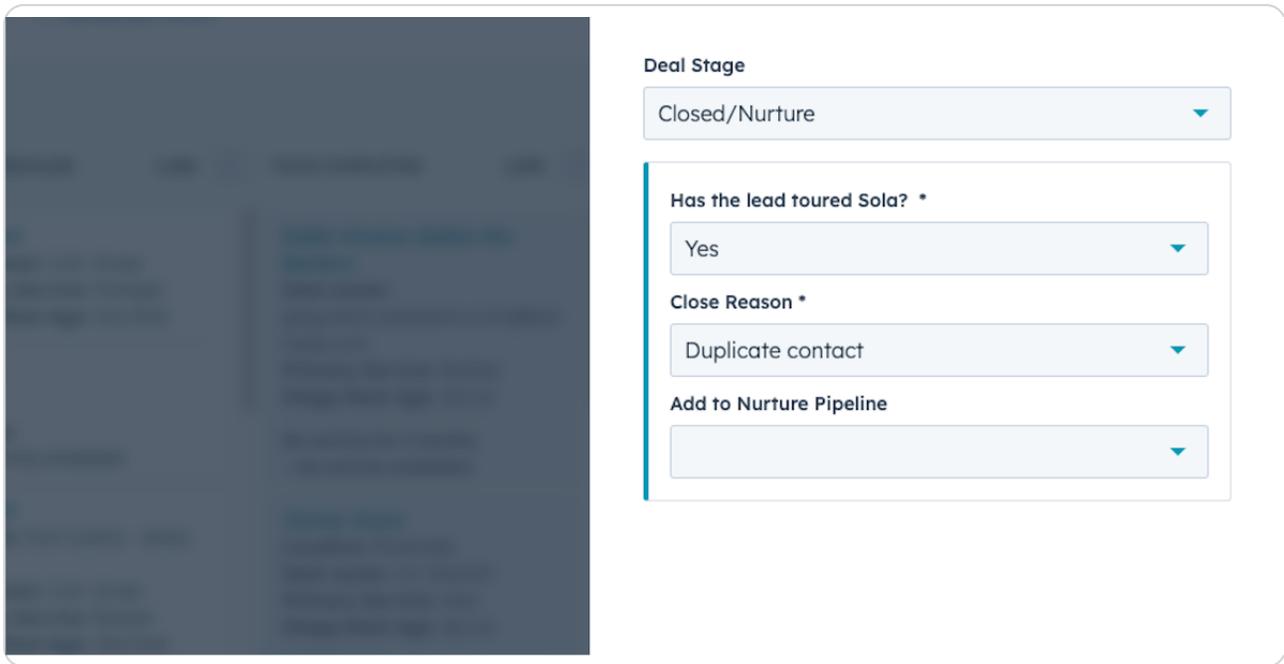
## # A Breakdown of All Close Lost Reasons

22 Steps

## STEP 11

### Close Reason - Duplicate contact

This is for if there is another Deal for a Pro already in HubSpot. By selecting this option you do not need to fill out any other information.



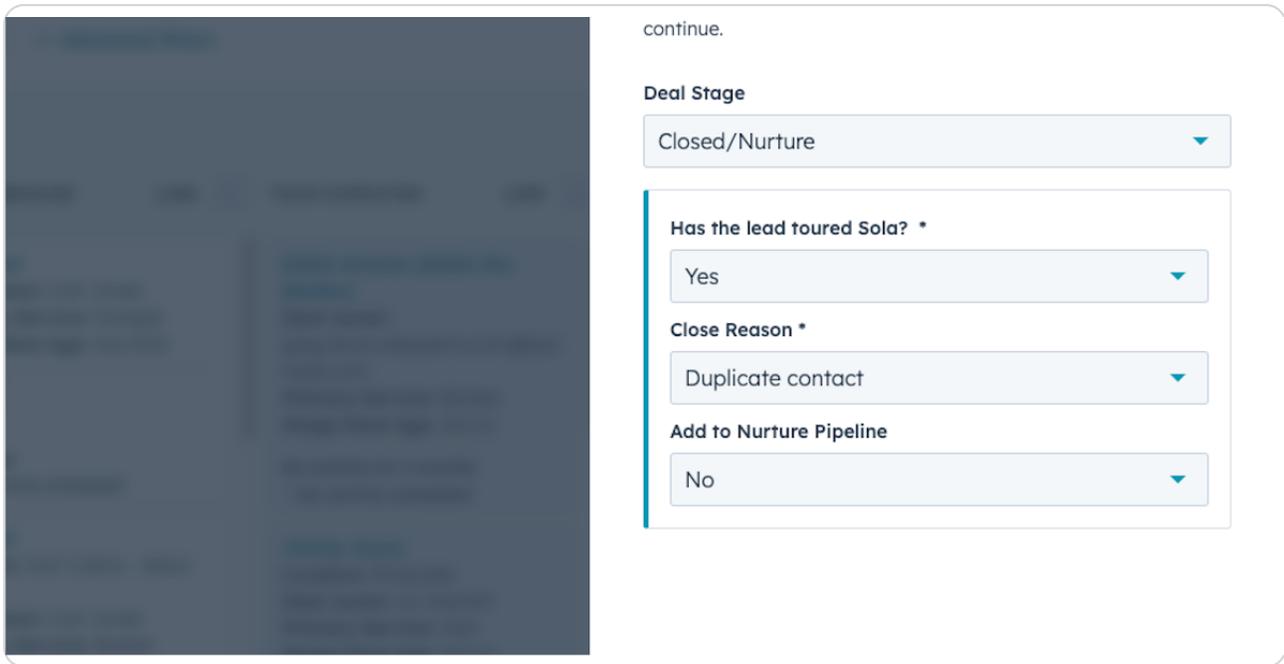
The image shows a screenshot of a HubSpot deal stage configuration interface. On the left, there is a dark, blurred area representing the deal stage details. On the right, there is a white panel with the following configuration options:

- Deal Stage**: A dropdown menu with the selected value "Closed/Nurture".
- Has the lead toured Sola? \***: A dropdown menu with the selected value "Yes".
- Close Reason \***: A dropdown menu with the selected value "Duplicate contact".
- Add to Nurture Pipeline**: A dropdown menu that is currently empty.

## STEP 12

### You will have the option to Add to Nurture Pipeline

Note: For a Duplicate contact you wouldn't want to put that Deal into the Nurture Pipeline, so for these you'll want to choose No.



continue.

**Deal Stage**

Closed/Nurture

**Has the lead toured Sola? \***

Yes

**Close Reason \***

Duplicate contact

**Add to Nurture Pipeline**

No

## STEP 13

### Close Reason - Went dark

If Went dark is chosen, you will need to fill out more information including Close Reason - Detail, Objections, and whether the Pro should be added to the Nurture Pipeline



## STEP 14

### Choose a Close Reason - Detail

**Dependent properties** ✕

Your organization has chosen to show these properties based on your choice for "Deal Stage". Some properties may be required to continue.

Deal Stage  
Closed/Nurture

Has the lead toured Sala? \*  
Yes

Close Reason \*  
Went dark

Close Reason - Detail  
Stopped Responding during Sales Process

Objection - Reasons

Add to Nurture Pipeline

Save Cancel

## STEP 15

### Select Objection - Reasons

Note: You can select more than one option.

Stopped Responding during Sales Process

Objection - Reasons

Contract Terms × Rental Duration ×

Search

- Rental Duration
- Payment Terms
- Customization/Alterations
- Insurance Requirements
- Contract Terms

Save Cancel

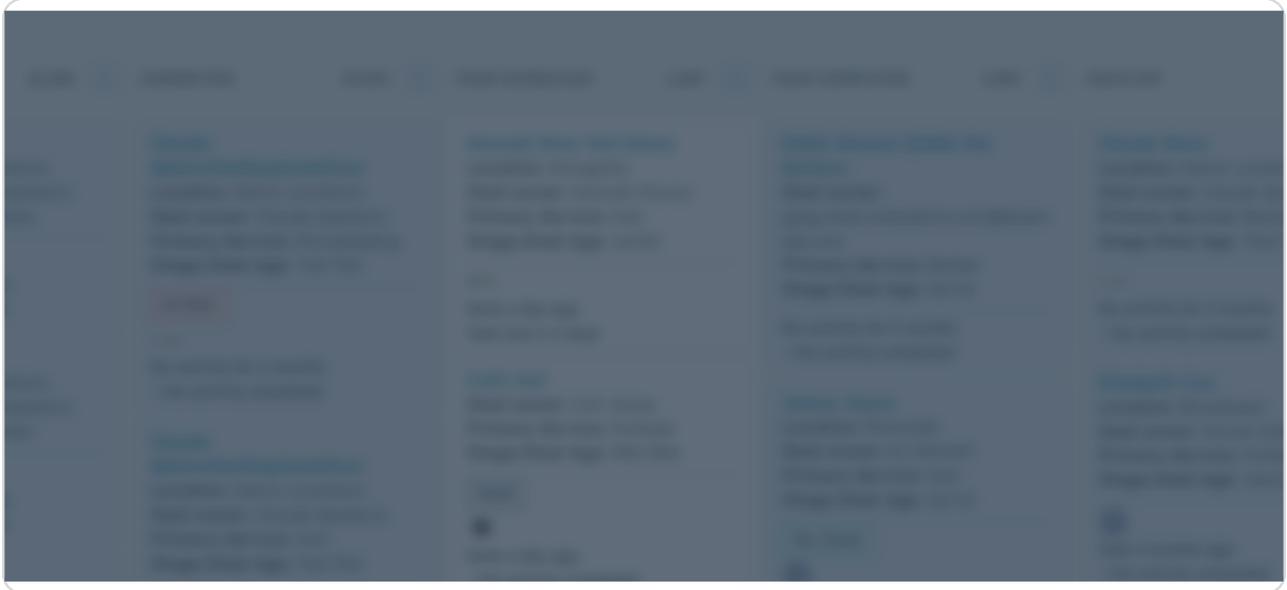
## STEP 16

### Select whether the Pro should be added to the Nurture Pipeline or not

## STEP 17

### If Yes is selected for the Nurture Pipeline, Include a Follow-up Task Date and Subject Line

Note: Once Saved, a Task will be created for you to follow up with the Pro.



## STEP 18

### Close Reason - No immediate availability

**Dependent properties** ✕

Your organization has chosen to show these properties based on your choice for "Deal Stage". Some properties may be required to continue.

Deal Stage  
Closed/Nurture

Has the lead toured Solo? \*

Yes

**Close Reason \***  
No immediate availability

Objection - Reasons  
Contract Terms x Rental Duration x

Add to Nurture Pipeline  
Yes

Follow-up Task: Date  
02/25/2025

Follow-up Task: Subject Line  
Follow up with Hannah

Save Cancel

## STEP 19

### Closed Reason - Not qualified Yet

**Dependent properties** ✕

your choice for "Deal Stage". Some properties may be required to continue.

Deal Stage  
Closed/Nurture

Has the lead toured Sala? \*  
Yes

**Close Reason \***  
Not qualified yet

Close Reason - Detail  
Financial Concerns

Objection - Reasons  
Contract Terms x Rental Duration x

Add to Nurture Pipeline  
Yes

Follow-up Task: Date  
02/25/2025

Follow-up Task: Subject Line  
Follow up with Hannah

Save Cancel

## STEP 20

### Close Reason - Went to a competitor

Note: If you change the Close Reason, the options for the other Close Reason - Detail may not clear. If that happens, make sure to update the Close Reason - Detail.

**Dependent properties** ✕

Deal Stage  
Closed/Nurture

Has the lead toured Sala? \*  
Yes

**Close Reason \***  
Went to a competitor

Close Reason - Detail  
Financial Concerns

This doesn't match your selection for "Close Reason". Please choose a valid option.

Objection - Reasons  
Contract Terms x Rental Duration x

Add to Nurture Pipeline  
Yes

Follow-up Task: Date  
02/25/2025

Follow-up Task: Subject Line  
Follow up with Hannah

Save Cancel

## STEP 21

### Update the Close Reason - Detail to fix the error

The screenshot shows a CRM interface with a 'Dependent properties' form on the right. The form includes the following fields:

- Deal Stage: Closed/Nurture
- Has the lead toured Solo?: Yes
- Close Reason: Went to a competitor
- Close Reason - Detail: Salons by JC** (highlighted with an orange box)
- Objection - Reasons: Contract Terms x Rental Duration x
- Add to Nurture Pipeline: Yes
- Follow-up Task: Date: 02/25/2025
- Follow-up Task: Subject Line: Follow up with Hannah

Buttons for 'Save' and 'Cancel' are visible at the bottom of the form.

## STEP 22

### Close Reason - Staying Put

The screenshot shows the same CRM interface as Step 21, but with the 'Close Reason' dropdown highlighted by an orange box and set to 'Staying put'. The 'Close Reason - Detail' dropdown remains set to 'Salons by JC'.

The form fields are:

- Deal Stage: Closed/Nurture
- Has the lead toured Solo?: Yes
- Close Reason: Staying put** (highlighted with an orange box)
- Close Reason - Detail: Salons by JC
- Objection - Reasons: Contract Terms x Rental Duration x
- Add to Nurture Pipeline: Yes
- Follow-up Task: Date: 02/25/2025
- Follow-up Task: Subject Line: Follow up with Hannah

Buttons for 'Save' and 'Cancel' are visible at the bottom of the form.

## STEP 23

### Close Reason - Went to a neighboring Sola

Dependent properties

Deal Stage  
Closed/Nurture

Has the lead toured Sola? \*

Yes

Close Reason \*

Went to a neighboring Sola

Provide additional details

Objection - Reasons

Contract Terms x Rental Duration x

Add to Nurture Pipeline

Yes

Follow-up Task: Date  
02/25/2025

Follow-up Task: Subject Line  
Follow up with Hannah

Save Cancel

## STEP 24

### Close Reason - In School / Not Yet Licensed

Dependent properties

Your organization has chosen to show these properties based on your choice for "Deal Stage". Some properties may be required to continue.

Deal Stage  
Closed/Nurture

Has the lead toured Sola? \*

Yes

Close Reason \*

In School / Not Yet Licensed

Close Reason - Detail

School/Apprenticeship

Add to Nurture Pipeline

Yes

Follow-up Task: Date  
02/25/2025

Follow-up Task: Subject Line  
Follow up with Hannah

Save Cancel

## STEP 25

### Close Reason - Attempting to book appointment

Note: This reason usually does not warrant putting the Deal into the Nurture Pipeline.



## STEP 26

### Close Reason - Vendor

Note: This reason usually does not warrant putting the Deal into the Nurture Pipeline.



## STEP 27

### Close Reason - Not interested at this time



**Dependent properties** ✕

Your organization has chosen to show these properties based on your choice for "Deal Stage". Some properties may be required to continue.

Deal Stage  
Closed/Nurture

Has the lead toured Sala? \*  
Yes

**Close Reason \***  
Not interested at this time

Objection - Reasons  
Too Expensive ✕

Add to Nurture Pipeline  
Yes

Follow-up Task: Date  
02/25/2025

Follow-up Task: Subject Line  
Follow up with Hannah

Save Cancel

## STEP 28

### Close Reason - Other



**Dependent properties** ✕

Your organization has chosen to show these properties based on your choice for "Deal Stage". Some properties may be required to continue.

Deal Stage  
Closed/Nurture

Has the lead toured Sala? \*  
Yes

**Close Reason \***  
Other

Provide additional details

Objection - Reasons  
Additional Amenities/Support ✕

Add to Nurture Pipeline  
Yes

Follow-up Task: Date  
02/27/2025

Follow-up Task: Subject Line  
Follow up with Hannah

Save Cancel

## STEP 29

### Close Reason - Went to a traditional salon

Note: This reason usually does not warrant putting the Deal into the Nurture Pipeline.



## STEP 30

### Close Reason - Can't afford

Note: This reason usually does not warrant putting the Deal into the Nurture Pipeline.



## STEP 31

### Close Reason - No Show

Note: This reason usually does not warrant putting the Deal into the Nurture Pipeline.



## STEP 32

**Once you have selected the Close Reason and completed the conditional information Click Save to update the Deal**

