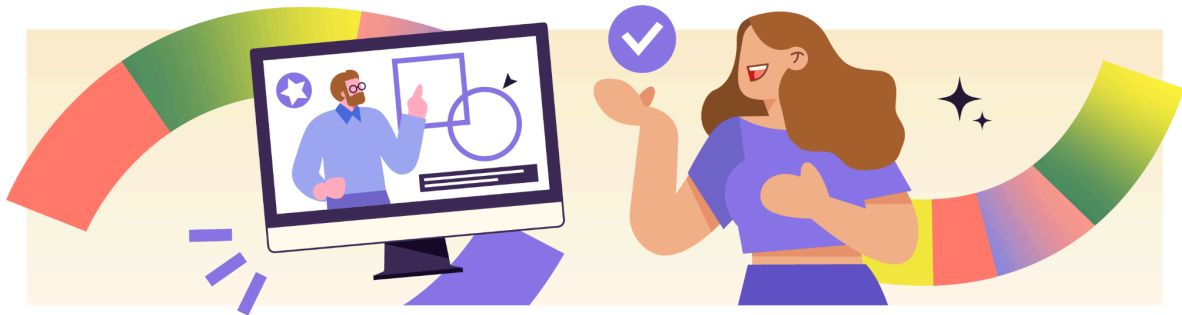


SDR CRM Starter Kit



Who this kit is for

If your team or program has provided its own equivalent assets, use those instead. This is a fallback set of generic CRM artifacts for learners working through a HubSpot course who do not yet have access to a real team's CRM standards.

What's in the kit

File	Purpose	Use during section...
Pipeline and Stage	Default 5-stage SDR deal pipeline with stage-entry evidence requirements	Setup and "Learn data validation" (hygiene stage-integrity evidence test)
Required Properties	Default required and optional contact + deal properties	Setup and "Learn data validation" (required-fields rule)
crm-hygiene-checklist.xlsx	Row-by-row diagnostic checklist matching the five hygiene rules taught in the chapter	"Learn data validation" (apply the rules to your data)
CRM Hygiene Checklist (text version)	Plain-text equivalent of the checklist for screen-reader-friendly reading	"Learn data validation" (alternative to XLSX for accessibility)

weekly-pipeline-report-template.xlsx	Column + rollup spec for the weekly pipeline report, ready to receive an exported HubSpot view	"Generate CRM reports and export" (build the report and map the export to template columns)
Weekly Pipeline Report Template Spec	Spec describing the report template's columns, formulas, and formatting	"Generate CRM reports and export" (alternative reference)

How to set up your CRM with this kit

If you don't already have a HubSpot Free account, create one (free, no credit card). Then:

1. **Pipeline + stages.** Open "Pipeline and Stages". In HubSpot, navigate to *Settings* → *Objects* → *Deals* → *Pipelines*. Use the default deal pipeline; replace the stages with the five in the file. Save.
 2. **Required properties.** Open "Required Properties". In HubSpot, navigate to *Settings* → *Properties*. Manually create each property listed under "Custom required properties" that doesn't already exist on Free's defaults. (HubSpot Free does not allow bulk creation of properties from CSV — each must be created in property settings before you can import data using it.)
 3. **Owner assignment.** Make sure every contact and deal you create from this point forward has you as the owner.
 4. **Hygiene checklist.** Open [crm-hygiene-checklist.xlsx](#) (or the text version). This is your reference for Section 2. Keep it open while you work through the section.
 5. **Weekly pipeline report template.** Open [weekly-pipeline-report-template.xlsx](#). This is your reference for Section 3. Your HubSpot report should produce the same columns in the same order so the export drops in cleanly.
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How to publish your weekly pipeline report (the cover-note convention)

The report you produce is not just the spreadsheet. It's the spreadsheet **plus a four-line cover note** that explains the number. Your cover note answers exactly four questions:

1. **What is the number?** (*Total pipeline value, and / or weighted value.*)
2. **What changed since last week?** (*The week-over-week delta.*)

3. **Why?** (*Hygiene fixes, deal demotions, deal additions, or deal closures that drove the delta.*)
4. **What will you watch this week?** (*At-risk deals; specific evidence gaps you're working to close.*)

The cover note is the report; the spreadsheet is the evidence. This convention is consistent with the chapter's case study and is repeated in "Weekly Pipeline Report Template Spec" for reference.

What this kit deliberately does not include

- **Tool-specific click-paths.** The kit is vendor-neutral; the course teaches the HubSpot Free workflow.
 - **A pre-populated CSV of fictional contacts or deals.** The chapter expects you to use your own real (or self-created) data so the hygiene exercises are meaningful. If you want test data, create a few records yourself. The act of doing so is part of learning the property model.
 - **Industry-specific variants.** The defaults assume B2B sales, generic SDR motion. If you work in a specialized vertical (industrial, agency-services, etc.), adapt the stages and properties to your reality. The course's case study and activity show what that adaptation looks like in practice.
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Compatibility notes

- **HubSpot Free 2026:** all artifacts run cleanly within Free-tier limits (1 deal pipeline, manual property creation, up to 10 dashboards and up to 50 reports on Free (current baseline; verify against live account UI if plans change), email + notification-center exports with 30-day link expiry).
- **Cross-CRM:** the property names and pipeline stages use vendor-neutral terms. Translation to Salesforce (Opportunities), Pipedrive (Deals), and Zoho CRM (Deals) requires only relabeling, not restructuring.