Use Case: Copy 6sense Score Export properties from Company object to Deal object

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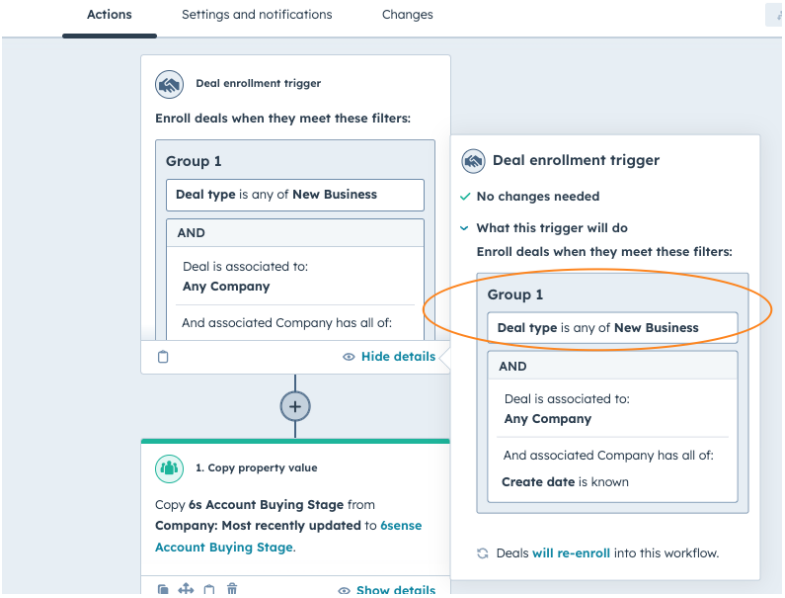
Stamp HubSpot Deals with 6QA Account Data (Predictive)

Purpose: Capture the *buying stage, 6QA status, and 6QA age in days* of a company and transfer it to Deal properties at time of ***relevant*** opportunity creation. Additional fields could include copying over 6QA start date and 6QA end date. This information will provide reporting insight into account behavior at the point of sales qualification. Capturing this snapshot on a deal-by-deal basis is essential because 6sense Account predictive scores are dynamic and constantly changing.

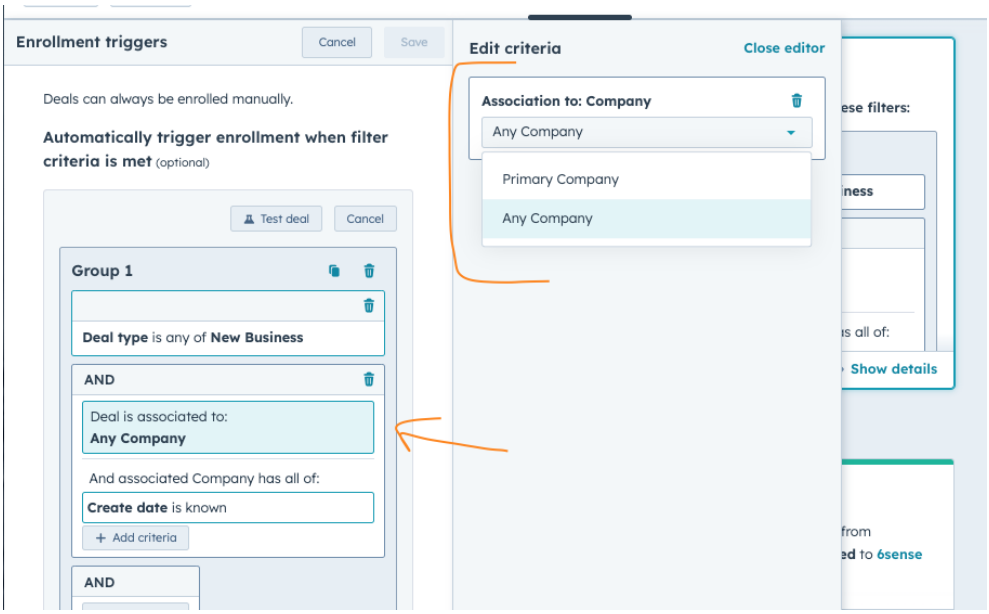
Step-by-Step:

1. Determine which properties you would like to copy from Company object to deal object. This use case recommends copying over *buying stage, 6QA status, and 6QA age in days*. These fields would have been created on your Company object during your 6sense predictive onboarding to receive the data passed from your 6sense Score Export Orchestrations. Create the fields you decide on as Deal properties with the same property type as the corresponding Company properties.
2. Understand how your business is defining a relevant opportunity in 6sense. This will provide you with your enrollment criteria for your workflow below.
3. Create a deal-based workflow to copy 6sense Score Export properties from Company object to Deal object using the enrollment criteria sourced from step one.
    a. Enrollment triggers:
        i. This example assumes the company has a relevant opportunity definition of type = ‘New Business’. Your company's definition could be different.



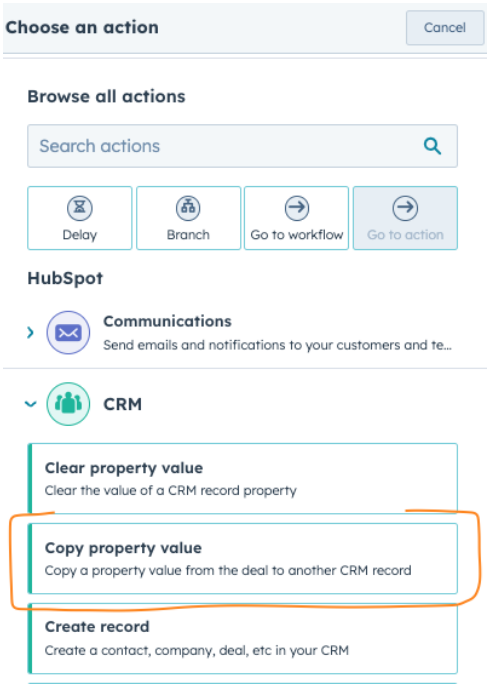
ii. This example assumes there is typically only one Company per deal, but the use of **association labels** on deal-to-company association could be leveraged to ensure you only enroll deals that have a relevant company associated with it. If you do not typically associate more than 1 company and don't use association labels, then you can use '*Deal is associated to: Any Company.*'

    1. Referencing 'Create date is known' ensures we can recognize the company that is associated with the deal.

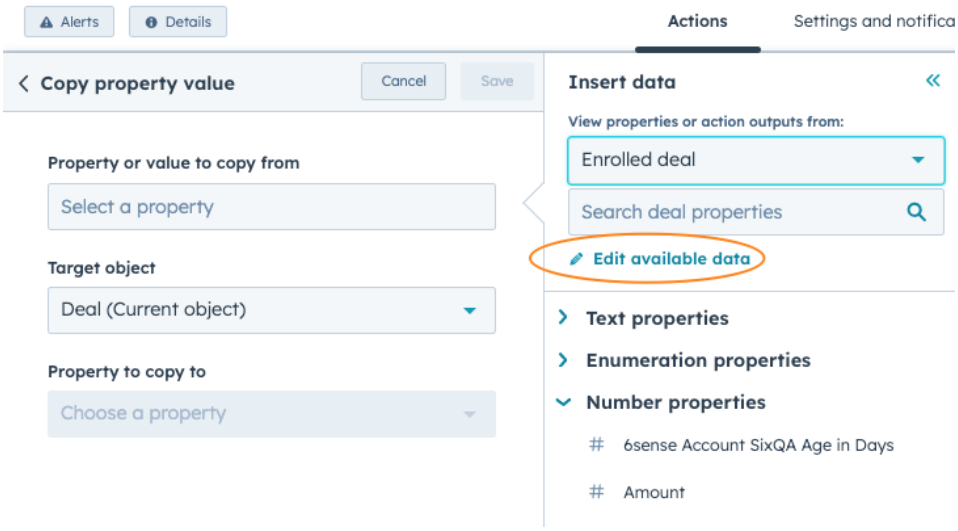


iii. In summary, the enrollment criteria in the screenshot example will pull a deal in when type equals ‘New Business’ and the deal is associated to any company in HubSpot with a known Create date.

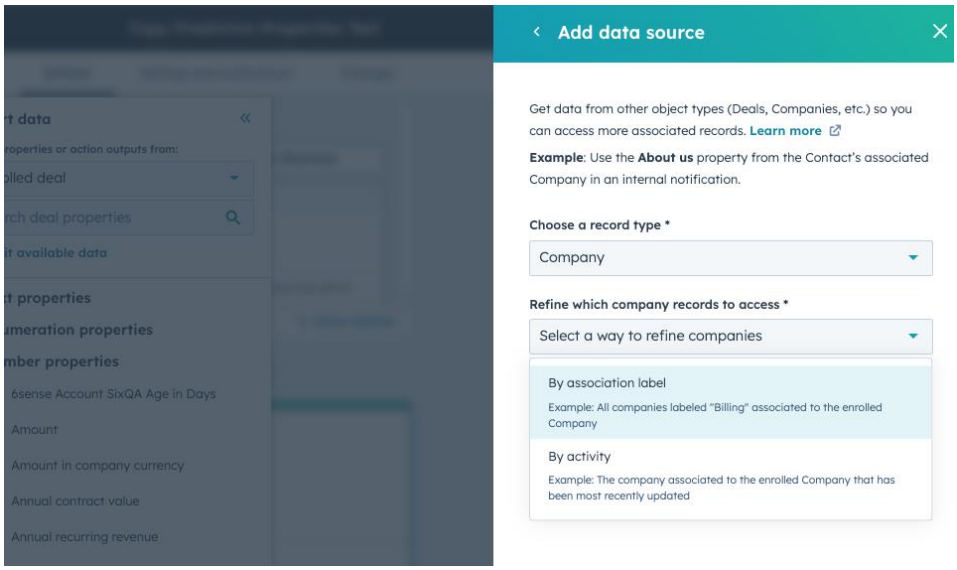
b. Workflow actions
   i. Once the deal is enrolled, it is time to copy the property values from the Company object to the deal object via the ‘Copy property value’ action.



   ii. When in the configuration, you can add a data source to look up from.



iii. Choose the data source that will allow you to reference the best associated company. This should match the enrollment criteria you used for Company association in step 3A.

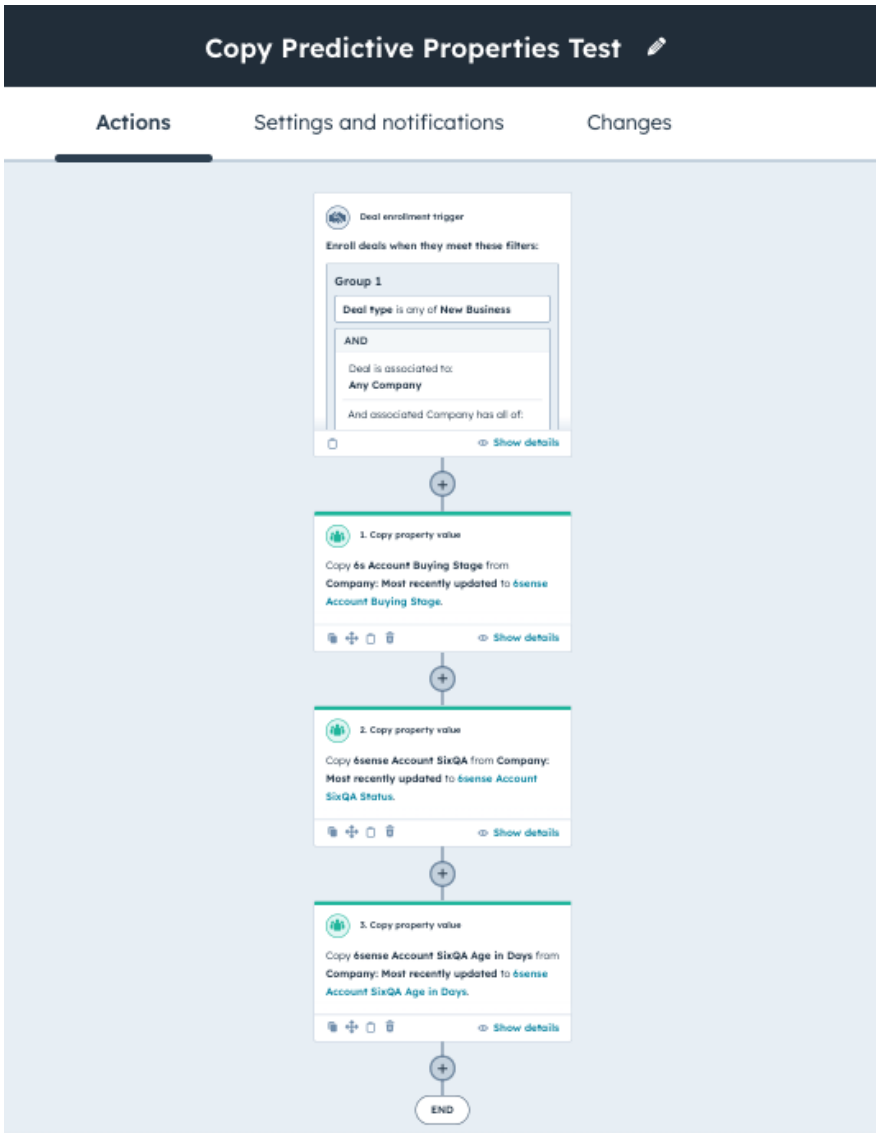


iv. Complete the property mapping and save. Repeat the workflow action steps for each property you would like to copy over. There should be one workflow action per property you want populated.

*This process will work best when implemented on a go-forward basis only. If you were to bulk run historical deals through this workflow, the deal fields would receive data

attributed to the company at the time of enrollment, not when the deal was created and became Sales Qualified.

Final version of what the workflow could look like:



Reporting Capabilities:

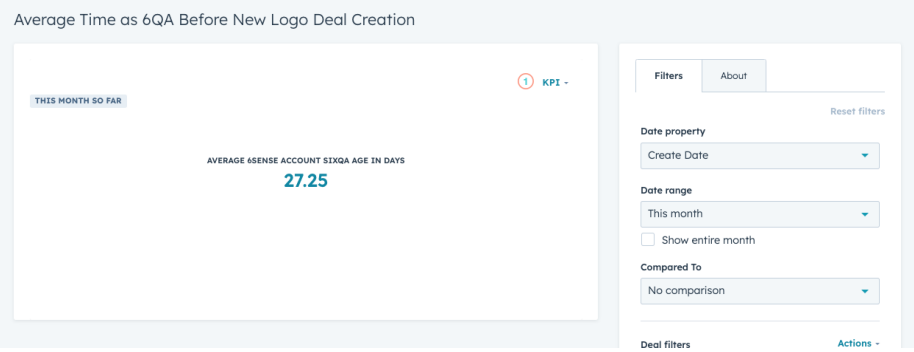
- Single object and multi-object reports can be created to see the buying stage of accounts at the time of Relevant Opportunity creation.
- If your organization tracks the date that a deal becomes Sales Qualified, then it is likely your 6sense relevant opportunity definition is aligned to that via 6sense

Opportunity create date mapping within standardization and via stage exclusions in the definition itself. This date can be used in your reports.

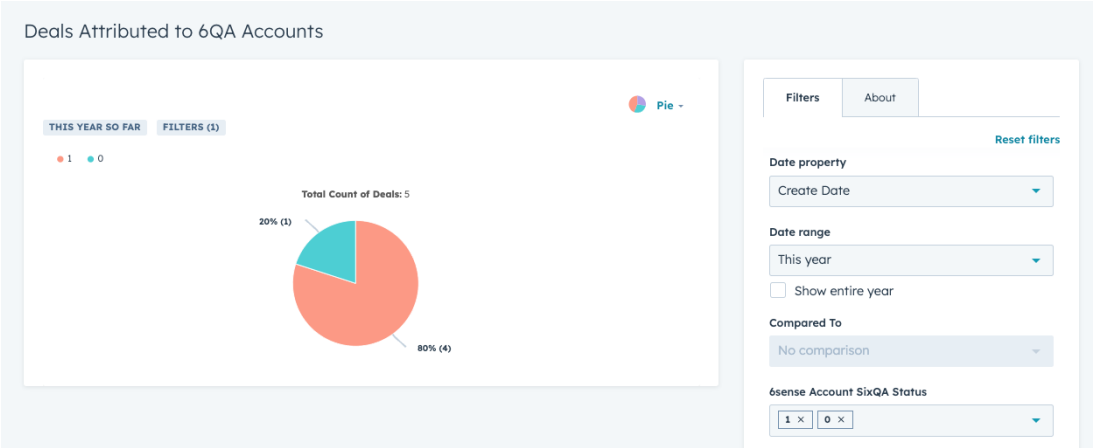
- Track the average time a company spends as a 6QA before relevant opportunity creation.
- Look at trends over time to see which buying stages are driving relevant pipeline creation.

Report Ideas:

- Average Time as a 6QA Before New Logo Deal Creation
    - Single object Deal report using the *6QA age in days* deal field within a summary view. The date field being reported on could be true deal create date or the date the deal became Sales Qualified (if your org tracks that).



- Number of Deals attributed to 6QA accounts in this Calendar Year
    - Single object Deal report using 6QA Status field displayed in a pie chat. The date field being reported on could be true deal create date or the date the deal became Sales Qualified (if your org tracks that).



- Deals by Buying Stage at Time of New Logo Deal Creation

- Multi object Deal & Company report using the buying stage deal field stacked by created month. The date field being reported on could be true deal create date or the date the deal became Sales Qualified (if your org tracks that).

Stamp HubSpot Deals with Account “Buying Stage” (ABM Only)

The same steps above could be followed if you are using 6sense as an ABM only platform with CRM integrated. This assumes you are taking advantage of the ‘Push Segment Names’ orchestration for segments referencing ‘Buying Stages’. The field you are pushing segment names to on the Company object could be copied to a Deal upon creation. This way, you can report on what ‘Buying Stage’ segment an account was in at time of Deal creation.