

HOW LEADS FLOW THROUGH HUBSPOT



SECTION 1: LEAD ENTRY

Two ways leads enter HubSpot



Leads generated directly by the Agent



Leads automatically routed by Atlas
(from atlasvanlines.ca, PPC, etc.)

SECTION 2: AUTOMATED ASSIGNMENT



Atlas lead routed to the correct Agent



Notifications sent to Agent contact person

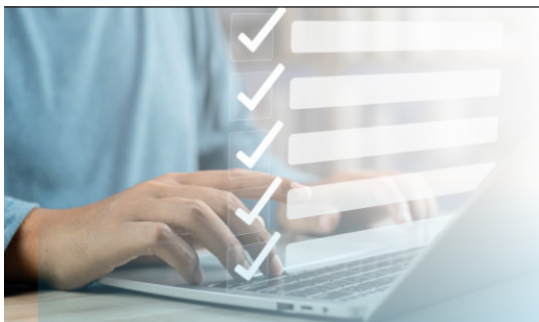
SECTION 3: AGENT ACTIONS IN HUBSPOT

- Review new lead in your inbox (Deal or Contact View)
- Add notes or tasks
- Connect to Yembo to schedule and manage surveys
- Send emails or call from the platform
- Update lead stage (e.g. Contacted → Quoted → Booked)



SECTION 4: REPORTING & DASHBOARDS

- Track all open and closed leads
- See conversion rate and follow-up status
- Customize views to fit your role



NEED HELP? CONTACT HUBSPOTSUPPORT@ATLASVANLINES.CA

Training starts in September — watch your inbox for details.