

PROJECT TITLE:

SALES-PIPELINE + TASK AUTOMATION SYSTEM (HUBSPOT + CLICKUP + [MAKE.COM](#))
(Demo)

SYSTEM OVERVIEW:

HubSpot CRM:

- Created custom sales pipelines
- Defined deal stages including “Follow-Up Required”
- Added and tracked multiple deals

HubSpot Sales Pipeline with Active Deals

The screenshot shows the HubSpot CRM interface with a title bar "HubSpot Sales Pipeline with Active Deals". The main area displays a "Deals" board view with several deals listed in columns: "Contract Sent", "New Lead", "Follow-Up Required", "Lead Captured", and "Contacted". Each deal card contains details like amount, close date, deal owner, and activity history. A sidebar on the left lists various HubSpot modules: CRM, Marketing, Content, Sales, Commerce, Service, Data Management, Automation, Reporting, Breeze, and Development.

Deal Stage	Deal Details
Contract Sent	Inventory Tracking Deal Amount: \$1,500 Close date: 02/28/2026 Deal owner: Glory Chibuike Create date: 02/02/2026
New Lead	Email marketing Amount: \$1,500 Close date: 02/01/2026 Deal owner: Glory Chibuike Create date: 02/02/2026
Follow-Up Required	Email Marketing Amount: \$5,000 Close date: 02/22/2026 Deal owner: Glory Chibuike Create date: 02/04/2026
Lead Captured	Lead Follow Up Amount: \$5,000 Close date: 02/03/2026 Deal owner: Glory Chibuike Create date: 02/04/2026
Contacted	Consultation Amount: \$5,000 Close date: 02/18/2026 Deal owner: Glory Chibuike Create date: 02/04/2026

ClickUp Workflow:

- Created Sales Operations Workspace
- Built Standardized follow-up task template
- Implemented Structured task statuses

ClickUp Follow-Up Tasks Generated from Hubspot Deals

The screenshot shows a ClickUp workspace titled "Glory Chidinma Chibuike's Workspace". The left sidebar contains various sections like Home, Inbox, Replies, Assigned Comments, My Tasks, and more. The main area displays three lists of tasks:

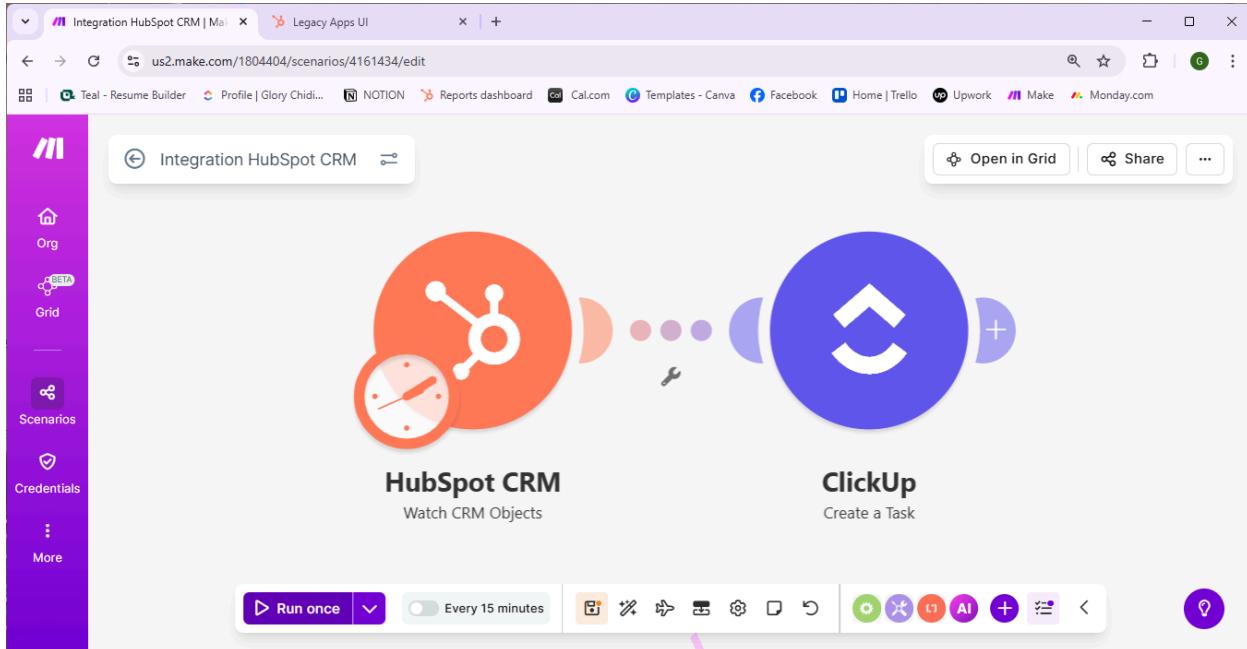
- WAITING ON CLIENT**:
 - Follow-Up Sales-Force Marketing- brightTech Technologies
- IN PROGRESS**:
 - Follow-Up Website Redesign Deal-Solid Rock Construction
 - + Add Task
- TO DO**:
 - Follow-Up -Business Optimization-Nova Solutions
 - + Add Task

Each task row includes columns for Name, Assignee, Due date, and Priority. A large pink watermark "Glory" is diagonally across the center of the screenshot.

Make.com Automation:

- Configured trigger: Deal updated
- Applied filter: Deal Stage = Follow-Up
- Automated task creation in ClickUp
- Default status set to “To Do”

HubSpot + ClickUp Automation in Make.com



Sales Follow-Up Standard Operating Procedure (SOP)

Purpose:

To ensure all sales deals requiring follow-up are tracked, actioned promptly, and properly updated in the CRM.

Trigger Condition:

When a deal in HubSpot is moved to “Follow-Up Required” stage.

Automated Action

- Make.com detects the deal update.
- A new task is automatically created in ClickUp.
- Task status is set to “To Do.”
- Task contains deals details and follow-up instructions.

Sales Representative Responsibilities:

1. Review newly assigned follow-up tasks in ClickUp.
2. Contact the prospect within 24 hours.
3. Log communication outcome in HubSpot deal notes.
4. Update deal stage accordingly:
 - Move to “Negotiation” if progressing

- Keep in “Follow-Up Required” if pending
- Move to “Closed Won” or “Closed Lost” if finalized

Escalation Rule:

If no follow-up is completed within 48 hours, the task remains visible in the “To Do” column for review.

Expected Outcome:

Improved response time, better deal visibility, and higher conversion consistency.

Results & Business Impact

Operational Improvements:

- Centralized sales pipeline tracking
- Automated follow-up task generation
- Reduced manual data entry
- Improved accountability for sales actions

Business Value Delivered:

- Prevents missed follow-ups
- Enhances deal visibility
- Standardizes sales process
- Improves response time
- Supports higher conversion potential

Estimated Efficiency Gains (Simulated Project):

- 50–70% reduction in missed follow-ups
- 30% faster response time
- Clear task accountability across tools