

PROJECT TITLE:

SALES-PIPELINE + TASK AUTOMATION SYSTEM (HUBSPOT + CLICKUP + [MAKE.COM](https://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 displays the HubSpot CRM interface, specifically the 'Deals' section. The left sidebar shows navigation options like CRM, Marketing, Content, Sales, Commerce, Service, Data Management, Automation, Reporting, Breeze, and Development. The main area shows a sales pipeline with stages: Contract Sent (2), New Lead (2), Follow-Up Required (2), Lead Captured (2), and Contacted (1). Each stage contains deal cards with details like deal name, amount, close date, owner, and create date. A summary bar at the bottom shows the total amount and weighted amount for each stage.

Stage	Deal Name	Amount	Close Date	Owner	Create Date
Contract Sent	Inventory Tracking Deal	\$1,500	02/28/2026	Glory Chibulike	02/02/2026
	Business Optimization	\$1,000	02/28/2026	Glory Chibulike	02/02/2026
New Lead	Email marketing	\$1,500	02/01/2026	Glory Chibulike	02/02/2026
	Sales Follow-up Pipeline	\$300	02/28/2026	Glory Chibulike	02/02/2026
Follow-Up Required	Email Marketing	\$5,000	02/22/2026	Glory Chibulike	02/04/2026
	Website Redesign Deal	\$2,000	02/28/2026	Glory Chibulike	02/02/2026
Lead Captured	Lead Follow Up	\$5,000	02/18/2026	Glory Chibulike	02/03/2026
	Sales-force marketing	\$5,000	02/28/2026	Glory Chibulike	02/02/2026
Contacted	Consultation	\$5,000	02/18/2026	Glory Chibulike	02/04/2026

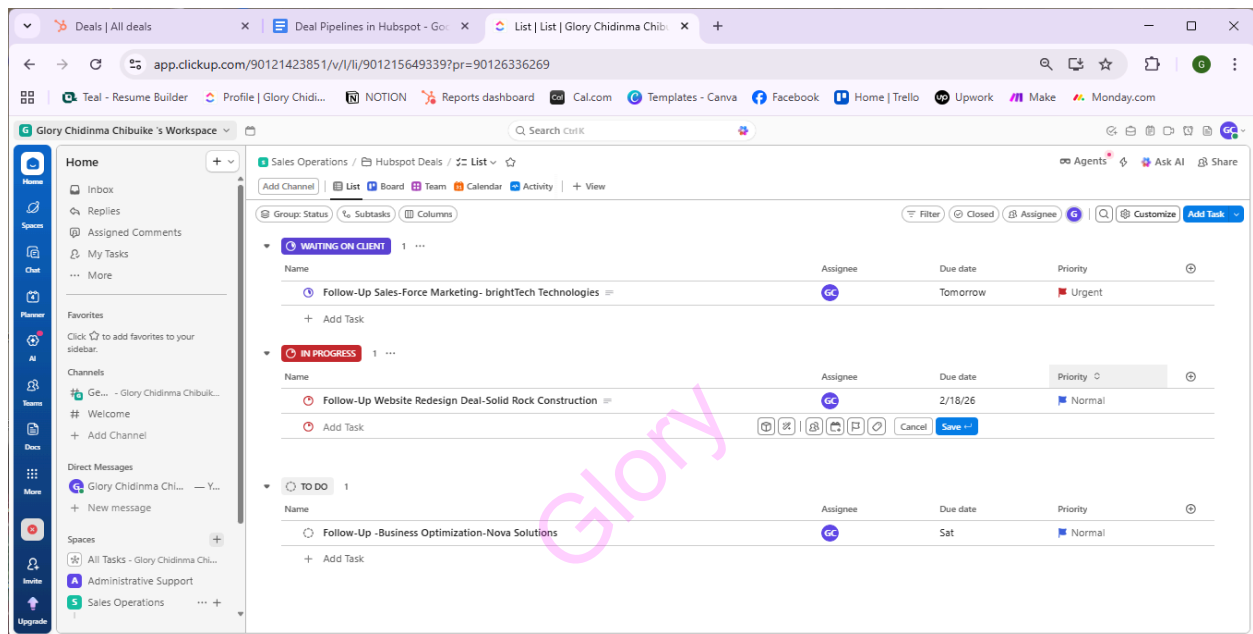
Summary Bar:

Stage	Total amount	Weighted amount
Contract Sent	\$2,500	\$2,250 (90%)
New Lead	\$1,500	\$300 (20%)
Follow-Up Required	\$5,000	\$2,500 (50%)
Lead Captured	\$8,000	\$3,200 (40%)
Contacted	\$5,000	\$1,000 (20%)

ClickUp Workflow:

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

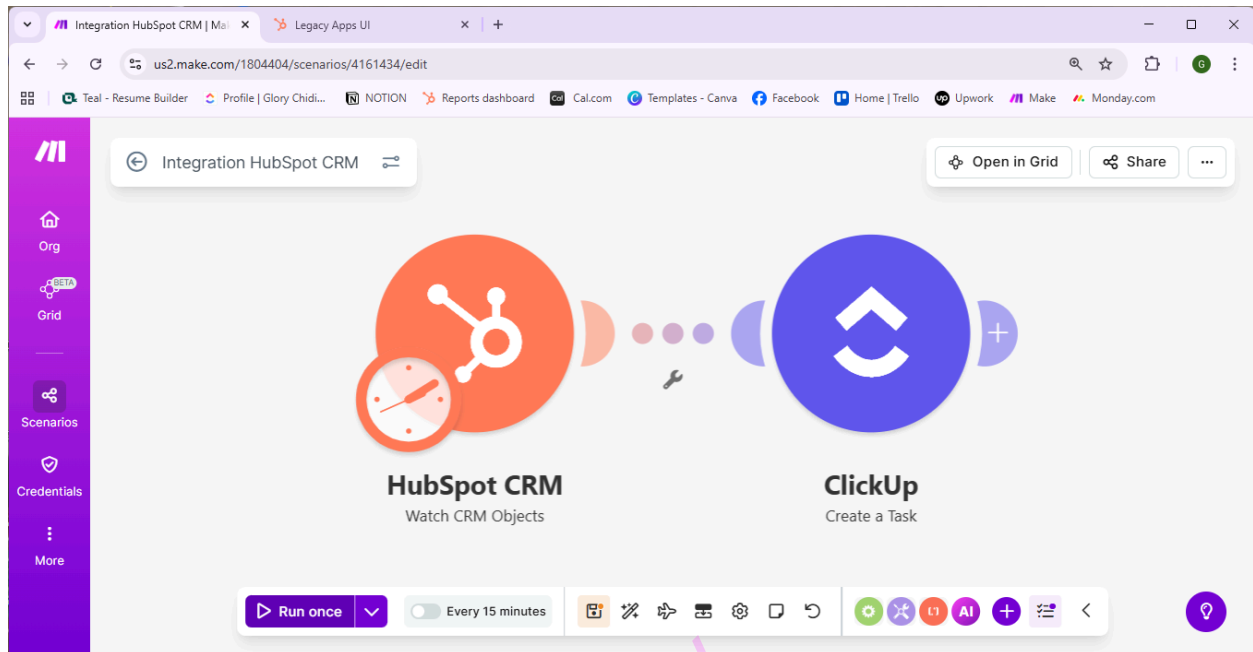
ClickUp Follow-Up Tasks Generated from Hubspot Deals



[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