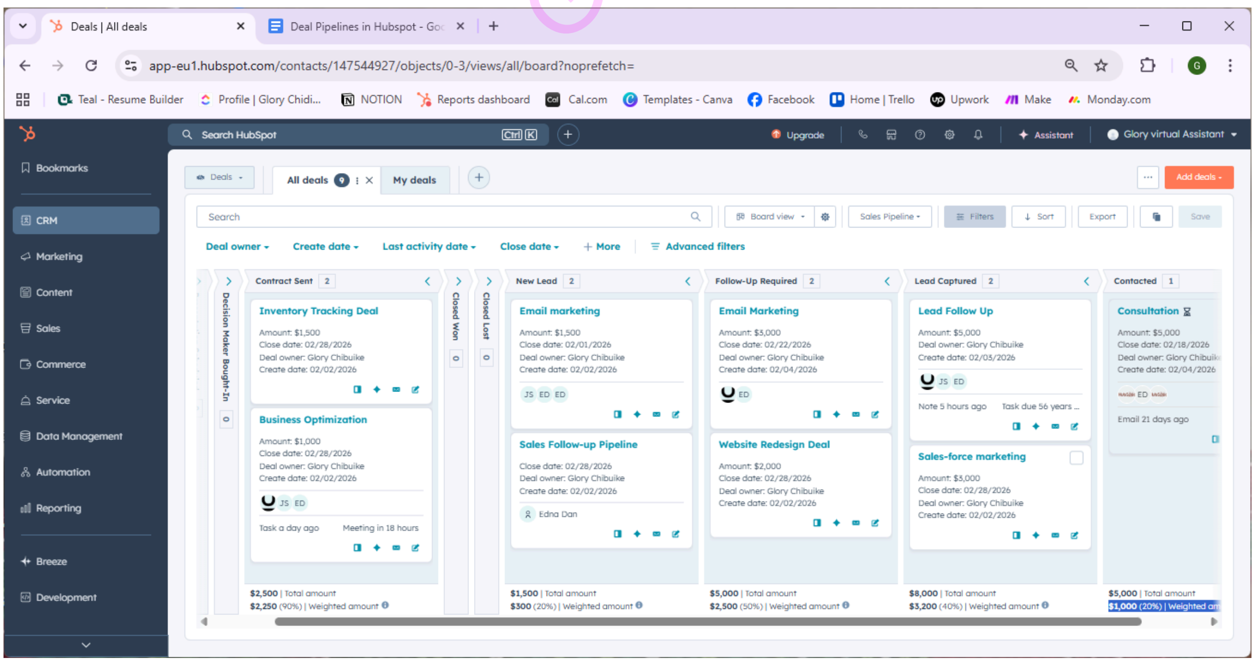
PROJECT TITLE:
SALES-PIPELINE + TASK AUTOMATION SYSTEM (HUBSPOT + CLICKUP + [MAKE.COM](http://make.com))
(Demo)

SYSTEM OVERVIEW:

HubSpot CRM:

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

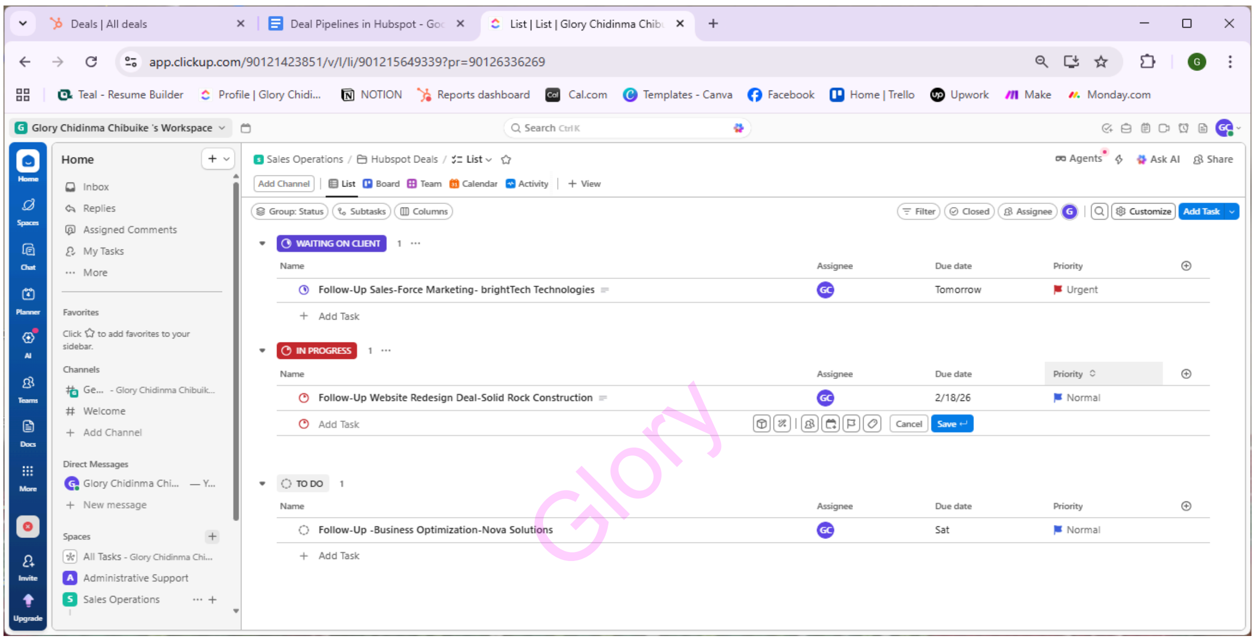
HubSpot Sales Pipeline with Active Deals



ClickUp Workflow:

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

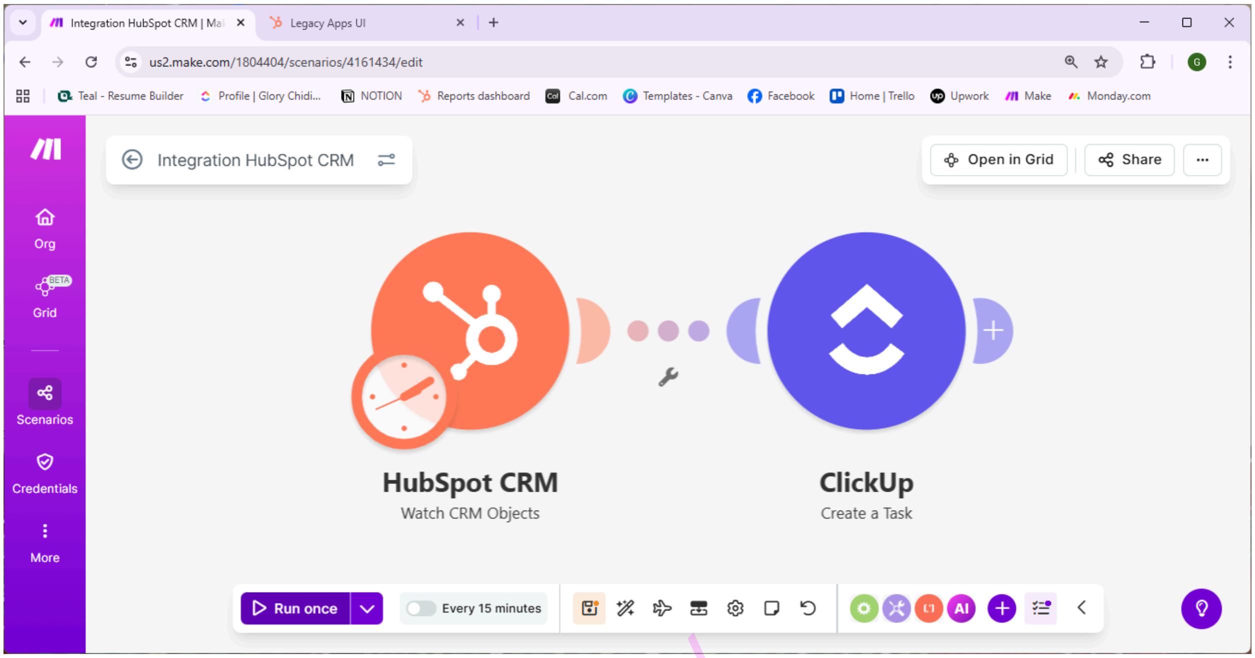
ClickUp Follow-Up Tasks Generated from Hubspot Deals



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