

PROJECT TITLE:

SALESPipeline + Task Automation System (HubSpot + ClickUp + [MAKE.COM](#))
(Demo)

PROBLEM STATEMENT: Sales teams were missing Follow-Ups and lacked visibility into deal progression, leading to lost opportunities and inconsistent tracking.

SOLUTION: Designed and Implemented a Structured sales workflow using HubSpot CRM for deal tracking, ClickUp for task management, and [Make.com](#) for automation to ensure consistent follow-ups.

TOOLS USED:

- HubSpot CRM
- Clickup
- [Make.com](#)

Glory

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 the "Deals | All deals" board selected. The board view displays several deals across different stages: Contract Sent, New Lead, Follow-Up Required, Lead Captured, and Contacted. Each deal card provides details such as amount, close date, deal owner, and creation date. The interface includes filters, sorting, and export options at the top, and a sidebar on the left for navigation.

ClickUp Workflow:

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

ClickUp Follow-Up Tasks Generated from Hubspot Deals

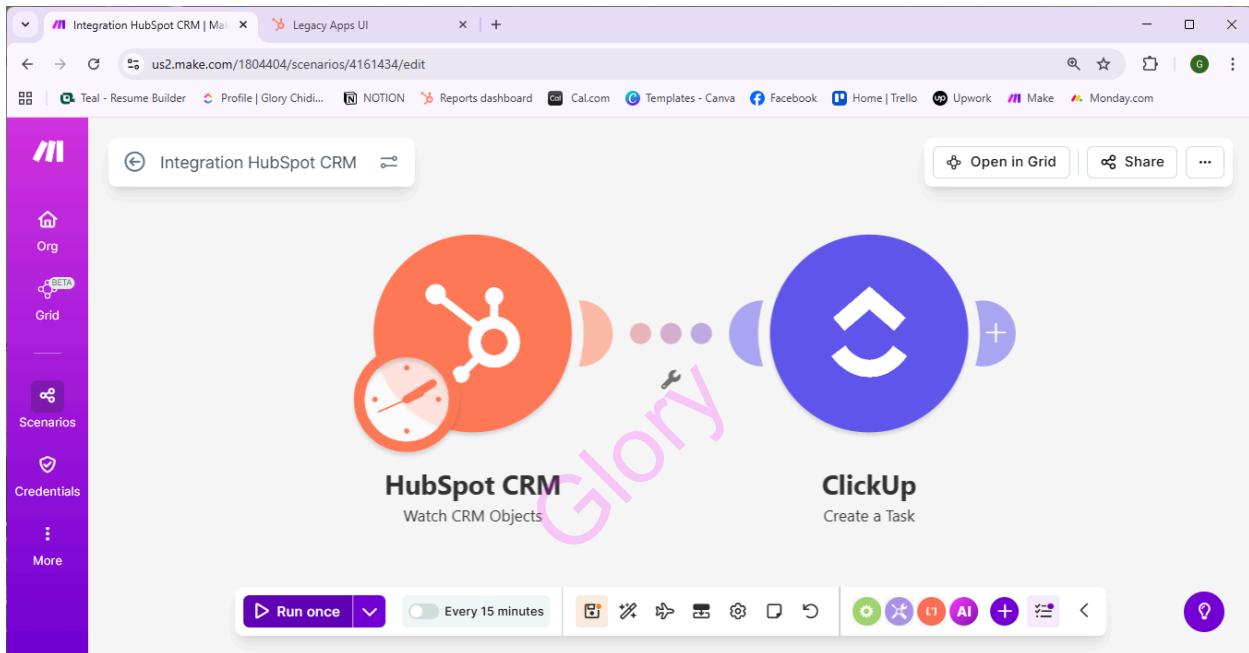
The screenshot shows the ClickUp interface for the "Sales Operations / Hubspot Deals / List" view. The sidebar on the left includes sections for Home, Inbox, Replies, Assigned Comments, My Tasks, Favorites, Channels, Direct Messages, and Spaces. The main area displays three task lists:

- WAITING ON CLIENT**: Contains one task: "Follow-Up Sales-Force Marketing- brightTech Technologies" assigned to "gc" with a due date of "Tomorrow" and priority "Urgent".
- IN PROGRESS**: Contains one task: "Follow-Up Website Redesign Deal-Solid Rock Construction" assigned to "gc" with a due date of "2/18/26" and priority "Normal". A "Save" button is visible.
- TO DO**: Contains one task: "Follow-Up -Business Optimization-Nova Solutions" assigned to "gc" with a due date of "Sat" and priority "Normal".

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



BUSINESS IMPACT:

- Improved sales visibility
- Eliminated missed follow-ups
- Standardized CRM workflow
- Introduced cross-platform automation