

## 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](#)

## 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 top navigation bar includes links to 'Deals | All deals', 'Deal Pipelines in Hubspot - Go...', and a search bar. The main content area shows a sales pipeline with several stages: 'Contract Sent', 'New Lead', 'Follow-Up Required', 'Lead Captured', and 'Contacted'. Each stage contains a list of deals with details such as 'Amount', 'Close date', 'Deal owner', and 'Create date'. The 'Contract Sent' stage shows two deals: 'Inventory Tracking Deal' and 'Business Optimization'. The 'New Lead' stage shows two deals: 'Email marketing' and 'Sales Follow-up Pipeline'. The 'Follow-Up Required' stage shows two deals: 'Email Marketing' and 'Website Redesign Deal'. The 'Lead Captured' stage shows two deals: 'Lead Follow Up' and 'Sales-force marketing'. The 'Contacted' stage shows one deal: 'Consultation'. The bottom of the screen shows a summary of the pipeline, including 'Total amount' and 'Weighted amount' for each stage.

Stage	Deal Name	Amount	Close date	Deal 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	02/01/2026
	Sales Follow-up Pipeline	\$1,500	02/28/2026	Glory Chibulike	02/02/2026
Follow-Up Required	Email Marketing	\$5,000	02/22/2026	Glory Chibulike	02/01/2026
	Website Redesign Deal	\$2,000	02/28/2026	Glory Chibulike	02/02/2026
Lead Captured	Lead Follow Up	\$5,000	02/03/2026	Glory Chibulike	02/01/2026
	Sales-force marketing	\$5,000	02/28/2026	Glory Chibulike	02/02/2026
Contacted	Consultation	\$5,000	02/16/2026	Glory Chibulike	02/01/2026

## ClickUp Workflow:

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

## ClickUp Follow-Up Tasks Generated from Hubspot Deals

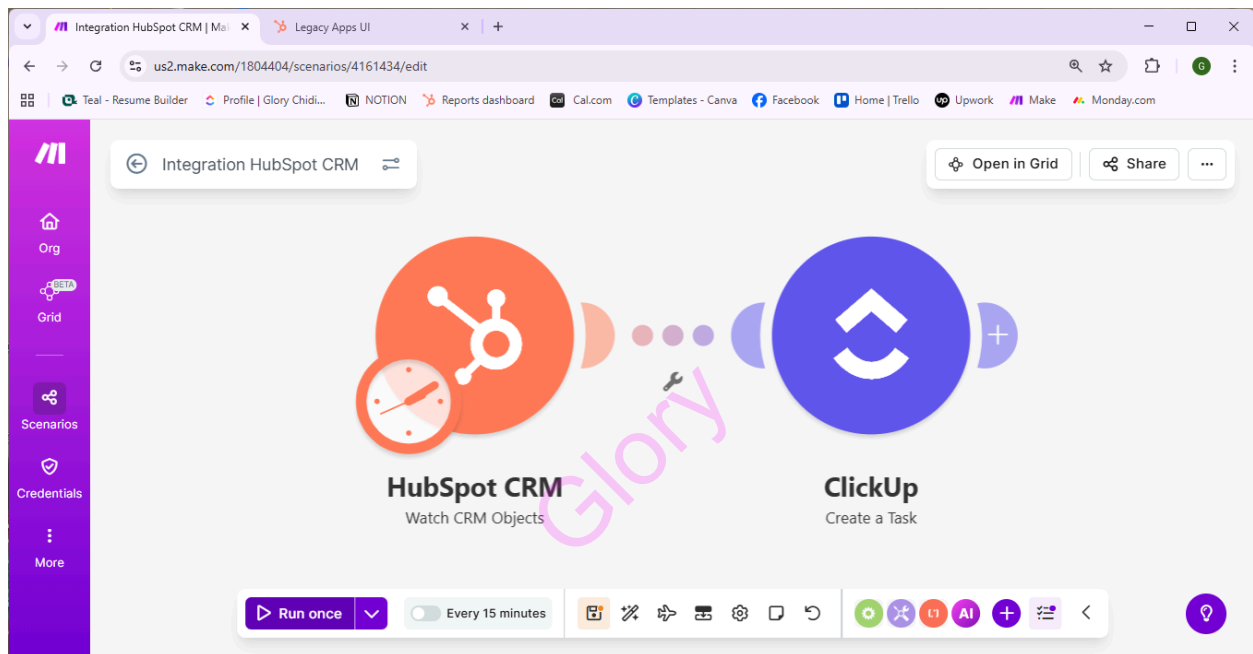
The screenshot displays a ClickUp workspace for 'Glory Chidinma Chibuike'. The main view is a list of tasks under the 'Sales Operations / Hubspot Deals' workspace. The tasks are organized into three status groups: 'WAITING ON CLIENT', 'IN PROGRESS', and 'TO DO'. Each task entry includes a name, an assignee (Glory Chidinma Chibuike), a due date, and a priority level. The 'WAITING ON CLIENT' group has one task: 'Follow-Up Sales-Force Marketing- brightTech Technologies' with a due date of 'Tomorrow' and 'Urgent' priority. The 'IN PROGRESS' group has one task: 'Follow-Up Website Redesign Deal-Solid Rock Construction' with a due date of '2/18/26' and 'Normal' priority. The 'TO DO' group has one task: 'Follow-Up -Business Optimization-Nova Solutions' with a due date of 'Sat' and 'Normal' priority. The interface includes a sidebar with navigation options like Home, Inbox, Replies, Assigned Comments, My Tasks, Favorites, Channels, Direct Messages, Spaces, and a top navigation bar with various app integrations.

Status	Name	Assignee	Due date	Priority
WAITING ON CLIENT	Follow-Up Sales-Force Marketing- brightTech Technologies	Glory Chidinma Chibuike	Tomorrow	Urgent
IN PROGRESS	Follow-Up Website Redesign Deal-Solid Rock Construction	Glory Chidinma Chibuike	2/18/26	Normal
TO DO	Follow-Up -Business Optimization-Nova Solutions	Glory Chidinma Chibuike	Sat	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