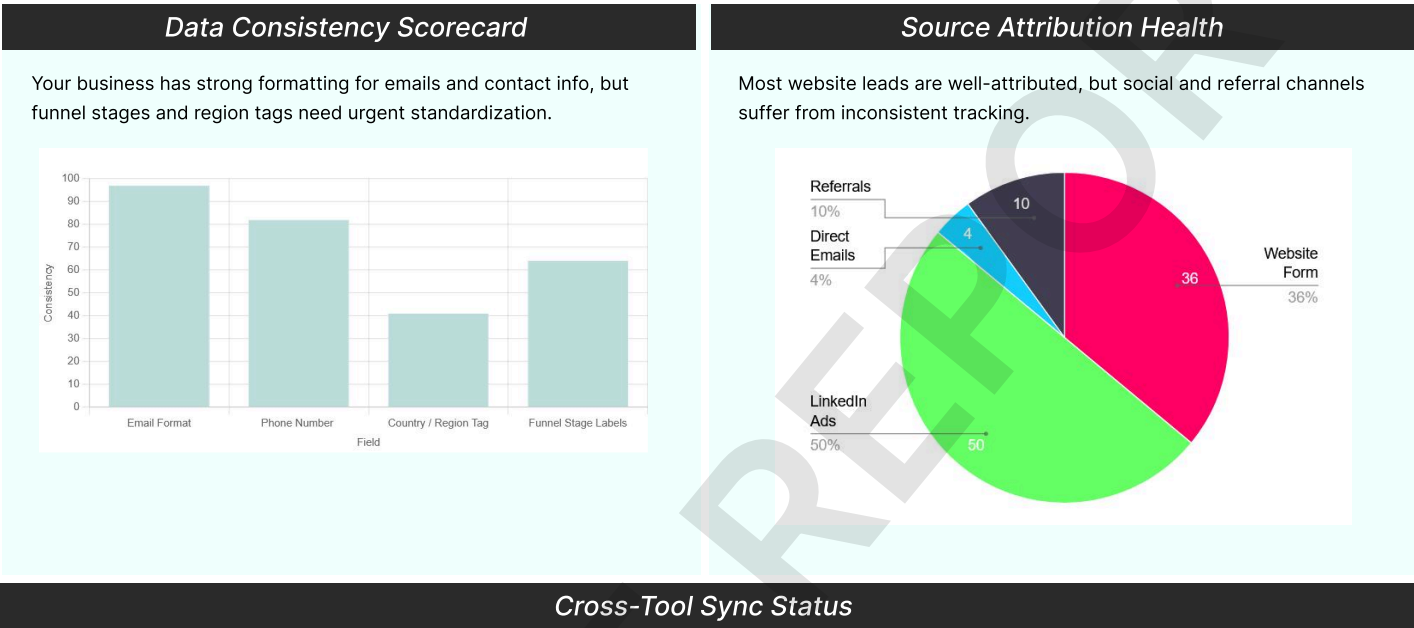


Sample Business 1 shows a strong foundation in organizing and maintaining its business data, particularly in areas like contact records & purchase history. However, some key areas such as behavioral tracking, funnel stage tagging and source attribution need further alignment and consistency. The company is well-positioned to level up with just a few targeted improvements, especially given the solid CRM adoption already in place.



- ### Strategic Recommendations:

 - Standardize funnel stage tags across sales and marketing
 - Add automation (Zapier, HubSpot workflows) to reduce manual data entry
 - Run a “data cleanup sprint” to identify duplicates, nulls and outdated records
- ### Small Business that may be able to support your needs:

 - Data Process & Cleanup:** Please reach out to NBLK Consulting - info@nblkconsulting.com or (212) 598-3030