



TECH STACK TIDY UP

Call Framework

Intro

Today we're going to look at your CRM or lead tracking system, email tools, and core sales flow. I'll tell you what's working, what feels messy, and the 3 things I'd fix first.

Why They Booked

- ☐ Overwhelmed / Something "feels messy"
- ☐ Scaling
- ☐ Too many tools
- ☐ Not using CRM properly / still in spreadsheets

Current Tools

- ☐ CRM (or none / spreadsheets)
- ☐ Email platform
- ☐ Lead capture tools
- ☐ Scheduling tools
- ☐ Automation tools (Zapier, Make, etc.)
- ☐ Reporting tools

Current State Snapshot

Ask:

1. Where do new leads come in? Where are they tracked?
2. How do you know what needs follow-up?
3. How do you send marketing emails?
4. Can you see pipeline value at a glance?
5. What feels frustrating right now?
6. What tools do you feel like you're paying for but not fully using?



Live Review

Focus ONLY on:

- CRM (or spreadsheets)
- Email tool
- Lead flow
- Pipeline visibility
- Reporting basics

CRM / Spreadsheet Checklist

Look for:

- ☐ Defined pipeline stages?
- ☐ Deals being used consistently?
- ☐ Duplicate records?
- ☐ Lifecycle stages set up?
- ☐ Clear ownership?
- ☐ Automation in place?
- ☐ Custom property chaos?
- ☐ Clean segmentation?

If spreadsheet:

- ☐ Central source of truth?
- ☐ Manual follow-up?
- ☐ No visibility across team?
- ☐ No reporting?
- ☐ Data living in multiple places?

Email Tool Checklist

- ☐ Lists segmented properly?
- ☐ Campaign tracking enabled?
- ☐ Multiple disconnected tools?
- ☐ Deliverability concerns?
- ☐ Automation or fully manual?



	Overall Stack Review ☐ Tool duplication? ☐ Paying for unused features? ☐ Manual tasks that should be automated? ☐ Reporting requires exporting data? ☐ Zapier “spaghetti” automations?
Wrap Up	1. Call out what’s working 2. Give them the 3 things you’d fix first
Hubbly Transition	If They Need Cleanup (Existing Tools Are Fine but Messy) “You don’t need new tools. You need clarity and cleanup. We can help you untangle this with a focused block of consulting hours.” Introduce: • Cleanup sprint / Consulting hours • 5 Bubbles to start If They’re in Spreadsheets / Chaos / No CRM “At some point, spreadsheets become hard to scale. A clean CRM foundation would simplify a lot of this — especially connecting sales and email.” Introduce: • HubSpot CRM (Pro) • Central contact database • Pipeline visibility • Email + CRM connected • Light automation • Clean reporting foundation