RISE & ROOTED

JUSTIFI REVOPS · PREPARED FOR BRETT & SARAH · ST. PAUL

Discovery day plan.

First, real credit for the Q3 GTM work. You have already rebuilt the company layer: simplified the fit scoring matrix, standardized the company views, and introduced clean properties for Company Lifecycle Stage, Research Status, and Company Context. That is the foundation most teams are still missing, so discovery is not about rediscovering it. It is about confirming it and building on top of it.

From there the lane is clear. Turn the new company fields into native workflow automation so prioritization runs itself, then add the contact layer that is still open: a Contact Fit Score built on persona match plus relationship strength, so reps know which of the three or four people inside each account matter most. The whole thing leans on one hierarchy, fit × relationship × engagement, and lands as the rep working a single daily view with signals routing the right next step.

DAY ONE · WEDNESDAY JULY 8, ON SITE 1:00 PM · TWO SESSIONS

SESSION 1 · ABOUT 70 MINUTES

With your Enterprise AE

20 MIN

Confirm the new foundation

See how the rebuilt fit score and the new properties land in real hands, and how they stay current.

QUESTIONS I WILL EXPLORE

- With the simplified fit score, do you trust the accounts it surfaces, and where does it still feel off?
- How are Lifecycle Stage, Research Status, and Company Context kept current, and by whom?
- The audit flags a thin loop between marketing, data ops, and sales. Where does that show up for you?

30 MIN

Watch a live run

Walk a real prospecting and follow up flow inside HubSpot to see where the new fields save time and where friction remains.

QUESTIONS I WILL EXPLORE

- Pick a live account and show me how you decide it is worth your time now.
- How do you assemble your day today, and have you ever used the Sales Workspace view?
- What still falls through the cracks when you get busy, and what feels like busywork?

20 MIN

Find the automation gaps

Pinpoint where the new company fields could drive native workflows, and where the contact layer needs to begin.

QUESTIONS I WILL EXPLORE

- Which of the next step automations would give you the most time back first?
- Where should company lifecycle connect to contact level lifecycle and lead stage, so the two do not fight?
- Which contacts inside an account matter most today, and how do you figure that out?

Amy Anderson · Founder & Principal Consultant · amy.anderson@riseandrooted.net · 612-845-2034 · riseandrooted.net

Day one, session two.

SESSION 2 · ABOUT 60 MINUTES

With your Marketing lead

Marketing is wiring up Clay to automate steps between systems. With the new company fields in place, the real question is how Clay keeps them fed and current, so we map it early and make sure what we build leans on it.

30 MIN

Clay as the connective tissue

Understand what Clay is automating, how it feeds the new fields, and part of the goal is helping you decide where, or whether, Clay earns its place in the waterfall.

QUESTIONS I WILL EXPLORE

- Which tools is Clay connecting, and how does it keep the fit score inputs and new properties current?
- What steps are you eliminating, and where does Clay stop and a human pick back up?
- Where does the marketing to data ops to sales loop still break, and can Clay close it?

30 MIN

How marketing feeds the motion

Understand how marketing supports the sales motion and settle two open items from the Q3 audit.

QUESTIONS I WILL EXPLORE

- How does a lead travel from marketing to sales today, and where does it get bumpy?
- Company Context: is an Other value with a short note worth adding, or does it invite mess?
- Company Parent: how do we surface the parent on owned company records when it is not yet a property?

DAY TWO · SHAPED BY WHAT DAY ONE SURFACES

Once Day One is done, I will have a much clearer read on what is needed and who I should be in the room with. Day Two is likely the Marketing lead alongside Brett, Sarah, and any other stakeholders, where we take what we learned and shape the Phase 1 build plan together: the build order, what lands first, and a rough effort estimate for each piece. I would rather scope Day Two honestly off real findings than guess at it now.

RISE & ROOTED

What we will work on.

Straight from your Q3 audit, these are the next steps your team named. Discovery lines up directly against them, so the build plan we leave with maps to work you have already decided matters. The tagged items are where I add the most, turning the new fields into working automation and standing up the contact layer.

1	Continue refining GTM processes before finalizing properties and views.	TOGETHER
2	Rebalance the account load and improve ownership structure, 3,000+ accounts, via the BD agent for future assignment to JD and Pedro.	YOUR TEAM
3	Build automation workflows using the new lifecycle, research, and context fields.	MY LANE
4	Complete the structured audit and data cleanup across company records.	TOGETHER
5	Finalize the Q3 target list and weekly GTM execution plan.	TOGETHER
6	Revise the sales playbook with the codified information from these updates.	MY LANE

DISCOVERY RATE

$150 / hour

Sessions on site, plus prep and write up.

8 to 10 hours · $1,200 to $1,500

One promise from me: if anything starts to drift out of scope or creep beyond what we agreed, please throw the stop sign and put up the blocker. I would rather you stop me early than ever feel like I am adding to the noise. Keeping this focused matters as much to me as it does to you.

Happy to share more detail or hop on a call whenever works for you. Excited to get going. **Thank you again, Amy.**

Amy Anderson · Founder & Principal Consultant amy.anderson@riseandrooted.net · 612-845-2034 · riseandrooted.net