

What we came away with.

First, the good news. You are in a genuinely strong spot. The company layer is rebuilt, HubSpot and Sales Navigator sync cleanly, and both JD and Brunna described the current process as a vast improvement over where you were. Discovery was not about finding what is broken. It was about seeing how the work actually runs so we know where I can add the most.

The core opportunity is white space. Only about 900 of your 25,000 companies are scored into ICP today. That is a big, mostly unmapped field. The prize is a repeatable way to surface the next good-fit companies and the right contacts inside them, and to make sure a good-fit visitor to your site rises to the top of a rep's day on its own.

WHAT I HEARD, BY THEME

Companies & scoring Fit model works: business model, 50-299 employees, sports/rec and home/field verticals. It misfires when enrichment mislabels the business model. 900 scored ICP of 25,000. White space is the open question.

Contacts No systematic contact scoring yet; segmenting valuable contacts is still ad hoc. We build this in tandem with Brunna as she adds and identifies new contacts, with Brett reviewing and approving. Scored on persona match × relationship strength × engagement.

Manual drag Much improved. The BD Agent works across Clay, HubSpot, other systems and Coworker to keep messaging dialed in for current targets, so reps know when and what to send. We will evaluate further automation later, but this is already in a good place.

Clay & MCP Clay MCP is high-value and the build is in a good place. Brunna is correcting info, lifecycle and status on the 900 current targets, held as-is for 90 days then reviewed. Fine-tune refreshes by last-modified date to control spend. Heyreach runs LinkedIn.

Quick wins Brunna's focus stays on Clay, Heyreach and marketing automation. AEO, SEO and buyer intent are quick wins to support that: see who is hitting the site, route them into warm-lead workflows, and identify the account. Use Breeze, Intelligence and Catch Up regularly.

Open questions Apollo: we need the plan, the pros and cons, the renewal date, and who uses it today before deciding. Also open: whether to add billing and invoicing to HubSpot, and wiring meetings, calls and Zoom recordings into HubSpot automatically.

Where we go from here.

These next steps map straight to the four goals you set for this engagement. Each one chips at the white space, the manual drag, or both.

NEXT STEPS, MAPPED TO YOUR FOUR GOALS

1. Company reporting

TOGETHER

Build a coverage view: scored ICP vs total, by vertical and business model, so white space is finally visible. Add a data-quality flag for mislabeled business models feeding the BD agent.

2. Contact reporting

TOGETHER

Stand up contact scoring in tandem with Brunna as she adds and identifies new contacts, with Brett reviewing and approving. Score on persona match × relationship strength × engagement and report on which contacts inside ICP accounts are worth a rep's time.

3. Remove manual steps

TOGETHER

Manual drag is already much improved via the BD Agent. Next: get meetings, calls and Zoom recordings logging into HubSpot for review and summaries, and formalize the Ready for Outbound handoff between Clay and HubSpot.

4. Easier AE targeting

TOGETHER

Wire buyer intent and website visits so a new good-fit visitor auto-prioritizes to the top of JD's day. Fold the daily flight plan into a HubSpot view instead of a side spreadsheet.

WHERE CLAY, AI, AND THE BD AGENT FIT

- Clay is the white-space engine. Brunna is cleaning the 900 current targets, then working her 3,000+ whitespace list to surface the next ICP companies, batched to control credits, writing back on HubSpot object ID. Brunna owns this.
- The BD Agent keeps messaging dialed in. It works across Clay, HubSpot, other systems and Coworker for current targets. Keep it on data-quality and enrichment, and feed it the business-model fixes so scoring stops misfiring.
- AI where it earns its keep. HubSpot buyer intent to auto-prioritize good-fit visitors, in-HubSpot email generation to end copy-paste, and a fast revision loop so Brett can approve or send drafts back.

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. This is a starting point we shape together, not the final map.

The working audit spreadsheet has the full findings list and the detail behind each of these. **Thank you again, Amy.**

What is still open.

A few things we did not fully capture on July 8. None of these are blockers. They are the open threads to pick up next session so the picture is complete. Pulled straight from the working audit spreadsheet.

HUBSPOT

1	Lock standard picklists for Lead Status and Lead Stage as JD uses them	P1
2	Map where marketing data actually lands on the contact record	P1
3	Formalize the marketing-to-sales handoff: what triggers it, who owns it	P1
4	Map deal and pipeline stages, and where scoring and handoffs hook in	P2
5	Inventory the forms, lists and enrichment feeding HubSpot	P2
6	Document the lead-quality reporting marketing trusts today	P2

CLAY & MCP

7	Pin down where the Clay MCP flow breaks or needs babysitting	P1
8	Confirm whether any Clay output reaches JD today	P2
9	Define the research payload a rep needs before working an account	P2
10	Map which HubSpot fields or notes the MCP writes to	P2
11	Capture Brunna's wish list for what the MCP flow could do next	P3

APOLLO & SALES NAV

12	Apollo decision: plan, pros and cons, renewal date, and who uses it	Open
13	Check contact freshness: who is missing, who is out of date	P2
14	Agree how enrichment maps to shared persona definitions	P2

CLAUDE AGENTS

15	Close the gap between sequences the composer pushes and what JD runs	P2
16	Confirm whether marketing sees or feeds any agent today	P2
17	Identify engagement signals marketing could hand the agents	P2

The stop sign still stands: if closing any of these starts to stretch the engagement beyond what we agreed, throw the blocker and we will realign before going further.