

What we found.

The foundation is solid. The company layer is rebuilt, HubSpot and Sales Navigator sync cleanly, and Clay is set up. The prize now is white space and contacts: only ~900 of 25,000 companies are scored to ICP, and there is no systematic contact scoring yet. Below is what we found, flagged by priority.

WHAT WORKS

- Company data is stable. ~900 core accounts scored to ICP; the three new fields (Company Lifecycle Stage, Research Status, Company Context) work as intended.
- Clay is set up. Running as the connective tissue. Brunna is building the orchestrations; I can support to keep the setup solid.

TOP FINDINGS & FLAGS

White space is huge: only ~900 of 25,000 companies scored to ICP. The repeatable path to the next good-fit accounts is the core opportunity.

P1

No systematic contact scoring yet. Segmenting valuable contacts is still ad hoc. This is the next real build.

P1

Company scoring misfires when enrichment mislabels the business model. Feed corrections back to the BD Agent.

P1

Contact quality fields (sends since last engagement, marketing vs non-marketing, bounce, opt-out, NeverBounce) need to anchor a clean base.

P1

Meeting and call logging: map how meetings get booked and calls made, and get Zoom into HubSpot with summaries.

P1

Two MCP write paths (Clay and the Claude agents) into HubSpot risk collision. Draw one clean map.

P2

'Ready for Outbound' review gate works but is a bottleneck to a faster loop.

P2

Apollo: open question. Need the plan, pros and cons, renewal date, and who uses it before deciding.

Open

HubSpot billing and invoicing: open question. Evaluate whether it belongs there vs Zoho Books.

Open

What we do next.

Next steps map to the goals you set and go straight at the white space and the contact gap. Priorities first, flags noted, nothing new added.

NEXT STEPS, IN PRIORITY ORDER

- P1** Go deeper on contacts. Map the contact fields in use today, then use standard HubSpot fields plus Clay to identify who to target, pull in, and action on. This is the focus.
- P1** Fix company scoring inputs. Feed business-model corrections back so fit stops misfiring, and build a coverage view so white space is finally visible.
- P1** Support Brunna on Clay. Keep the orchestrations she is building on track; point Clay at the 3,000+ whitespace list to surface the next ICP accounts.
- P1** Log meetings, calls and Zoom. Get them into HubSpot with summaries so activity is visible and reviewable.
- P2** Resolve the two MCP paths. One clean map for Clay and the Claude agents so they do not step on each other.
- Open** Decide on Apollo and HubSpot billing. Gather the facts on both, then decide with the team.

LOGISTICS & ACCESS

- Meetings stay flexible. Next sessions can run virtual, or I can come back on site, whatever works best for the team.
- Partner access. When it works for you, please add me through the HubSpot partner access setting so I can support the contact work directly.

One promise: if anything starts to drift out of scope or creep beyond what we agreed, throw the stop sign and put up the blocker. I would rather stop early than ever add to the noise. This is a starting point we shape together.

The full findings list and the Day 2 punch list live in the working audit spreadsheet. **Thank you, team.**