

Where we landed.

A short, shareable recap of what is working and where we go next. The short version: the foundation is solid, Clay is set up, and the next real work is on contacts.

THE CORE TAKEAWAYS

Company data is stable

The company layer is in a good, steady place: about 900 core accounts scored to ICP, with the new fields we built (Company Lifecycle Stage, Research Status, Company Context) working as intended.

Clay is set up

Clay is stood up and running. Brunna is working on the orchestrations, and I can support her to make sure that setup is solid and does what she needs it to.

Contacts are the next focus

The next step is going deeper on contacts: understanding the fields in use today, then leveraging standard HubSpot fields plus Clay to identify who we should target, pull in, and action on.

NEXT STEPS

- Go deeper on contacts. Map the contact fields being used now, then use standard HubSpot fields and Clay together to surface the right people to target and bring in.
- Support Brunna on Clay. Keep the orchestrations she is building on track and confirm the setup holds.
- Meetings stay flexible. The 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, I would like to be added through the HubSpot partner access setting so I can support the contact work directly.

As always: if anything starts to drift out of scope, 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 and the Day 2 punch list live in the working audit spreadsheet. **Thank you, team.**