

Your brief already names every piece.

You listed what works and what is missing. The job in Phase 1 is to connect them so they run as one system. All native HubSpot, no new tools. Here is the build, laid next to the pieces you already have.

FROM YOUR BRIEF · WHERE THINGS STAND

The pieces you have

Strong assets, plus the gaps between them. None of this is broken. It just is not connected yet.

WORKING · WE BUILD AROUND THESE

- Company fit score that reliably directs where time goes, recalibrated by your agent.
- Well defined buyer personas for the people who matter inside each account.
- Co-Work Composer agent that customizes outreach and pushes it into HubSpot.
- Enrichment through Apollo, with Clay under evaluation for later.

MISSING · THE CONNECTIVE TISSUE

- No contact fit score. No systematic way to rank the 1–2 people who actually decide inside each account.
- Stages unused. Lifecycle, lead stage and status have no shared meaning, so nobody can see where a relationship stands.
- Sales Workspace unused. Reps assemble the day from separate views and enroll people one by one, by hand.
- Signals not wired. When a high fit contact lights up, nothing routes the next step or the executive connection play.

The pattern: the smarts live in the assets, the friction lives in the gaps between them. Phase 1 closes those gaps.

ALL NATIVE · NO NEW SPEND

PHASE 1 · CONNECTING THE PIECES

One connected system

We build the layers you are missing and wire them to the assets you already have, all inside HubSpot.

FOUR CONNECTIONS THAT MAKE IT WHOLE

- Steady the score's path in. Make the agent's write to HubSpot reliable and timed, so prioritization runs on a number the team trusts.
- Capture relationship strength. Turn what reps already know into a structured field, so the contact score ranks the real 1–2 decision makers, not just personas.
- Smooth the draft handoff. Bring the Composer's output from a Note into a rep ready action in HubSpot, so a good message gets sent, not re typed.
- Make engagement visible. Confirm where sending happens and bring opens, clicks and replies back onto the record, so the triggers and exec play have signal to act on.

PHASE 1 TIMELINE · ROUGHLY 6 TO 9 WEEKS

- Weeks 1–2 Discovery sprint**
Working sessions, day in the life, map the score, data and agent connections. Output is this plan with effort estimates.
- Weeks 3–4 Company layer**
Tiered company views and native workflows on the fit score, plus the hardened score write path.
- Weeks 4–6 Contact + Workspace**
Contact score with persona and relationship strength, joined to the company score and surfaced in the Sales Workspace.
- Weeks 6–9 Signal + handoff**
Smooth the draft handoff, bring engagement back onto the record, wire the triggers and the exec connection play. Walkthrough and docs.

The outcome: the rep spends less time picking and copying. The system points to the right person, hands them the message, and flags when to move.