

HubSpot CRM	Standard Tier	11 Users	2 Pipelines	1,842 Contacts	4 Automations	2 Integrations	Complete Handoff
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HubSpot configured · 11 users set up · 2 pipelines built · 1,842 contacts imported · 4 automations active · Gmail + Calendly connected · Admin hando...

1 CRM Setup Summary

CRM Platform	HubSpot (Sales Hub Professional)
Account Name	■■■■■■■■■■
Timezone	America / Chicago
Company Logo	Uploaded
Default Currency	USD
Admin User	■■■■■■■■■■

Users Configured — 11 total

NAME	ROLE	ACCESS
■■■■■■■■■■	Director of Recruiting	Admin
■■■■■■■■■■	Senior Recruiter	User
■■■■■■■■■■	Recruiter	User
■■■■■■■■■■	Recruiter	User
■■■■■■■■■■	Account Manager	User
■■■■■■■■■■	Account Manager	User
■■■■■■■■■■	Account Manager	User
■■■■■■■■■■	Recruiting Coordinator	User

+ 3 more users configured

2 Pipeline Configuration

Pipeline 1	New Business
Purpose	New client opportunities → placement
Default Assignee	Round robin — Account Managers

STAGE	PROBABI...	NOTES
New Lead	10%	Auto-created via Typeform
Discovery Call Booked	20%	Calendly link auto-sent
Discovery Call Completed	35%	
Proposal Sent	60%	Task: follow up in 3 days
Verbal Commitment	80%	
Placement Confirmed	Won	
No Longer Pursuing	Lost	

Pipeline 2: Candidate Pipeline — 6 stages (Sourced › Screened › Submitted › Interviewing › ...)

3 Import Summary

Source File	contacts_full_export.csv
Import Method	HubSpot native CSV import
Pre-Import Count	2,041 rows
Duplicates Removed	199
Records Imported	1,842 contacts
Skipped / Flagged	0 — imported cleanly
Companies Created	214 (domain matching)

Field Mapping — 12 fields

SOURCE (CSV)	HUBSPOT FIELD
First Name	First Name
Last Name	Last Name
Work Email	Email
Mobile	Phone Number
Employer	Company Name
Job Title	Job Title
Lead Source	Lead Source
Notes	Contact Notes (custom)
Discipline	Discipline / Practice Area (custom)
Placement Date	Last Placement Date (custom)

4 Automation Summary

4 automations configured and active at handoff

AUTOMATION	TRIGGER → ACTION
New Lead Assign...	Deal created → assign to next recruiter (round r...
Proposal Follow-Up	Stage: Proposal Sent → task: follow up in 3 days
Inactivity Alert	No activity 7 days → email deal owner
Form → Contact	Typeform via Zapier → create/update Contact re...

5 Integration Summary

INTEGRATION	ACCOUNT	NOTES
Gmail / Google Wor...	■■■■■■■■■■	All 11 users connected
Calendly	■■■■■■■■■■	Auto-sent on Discovery ...

8 Scope Boundary

INCLUDED	NOT INCLUDED
CRM setup + configuration	Ongoing CRM administration
11 user accounts	Consulting / RevOps advisory
2 pipelines (7 + 6 stages)	Custom software or API work
10 custom fields	Unlimited revisions
1,842 contacts imported	Training beyond Handoff Guide
4 automations active	
Gmail + Calendly connected	