

AI OPERATIONAL ASSESSMENT

YOUR BUSINESS

Operational analysis, AI readiness, ROI, roadmap and recommended stack to turn manual processes into measurable workflows.

SECTOR

Professional Services

EMPLOYEES

6-20

COMPLEXITY

Medium

Executive Summary

Your Business operates with a partially structured stack. HubSpot, Notion and Slack are in use but remain largely disconnected. Lead-to-onboarding handoffs depend on manual coordination, creating inconsistent client experiences and measurable delays in delivery. Excel remains the default for tracking that should live in HubSpot. Without automated triggers, follow-up reliability depends entirely on individual effort, not process design. As team size grows, this fragmentation will amplify errors, increase onboarding time and limit management visibility on pipeline health.

AI READINESS

52/100

COMPLEXITY

Medium

ANNUAL IMPACT

€12k-€28k/year

Business Impact & ROI

TIME SAVED

8-16 hours/week

MANUAL WORK

30-45%

MONTHLY IMPACT

€1.5k-€4k/month

RESPONSE TIME

from 1 day to 2h

EST. PAYBACK

1-3 months

PROCESSES IMPACTED

3-6 processes

The identified opportunities indicate concrete potential for reducing manual work, improving response times and increasing operational visibility. Estimated impact should be validated during the first operational cycle through shared KPIs.

Operational Maturity

CURRENT LEVEL

Process-Driven Operations

Your Business already operates with partially structured processes and multiple digital tools supporting daily operations. However, several activities still require manual synchronization between HubSpot, Notion and Excel. Workflow automation and CRM integrations can significantly improve scalability, reduce onboarding delays and give the team real-time visibility on pipeline and project status.

AI READINESS SCORE

52 / 100

Current Operational Frictions

Lead handoffs between sales and delivery rely on manual Slack messages and Excel notes, creating inconsistency and lost context.

Client onboarding has no automated triggers. Each step depends on a team member remembering to act, causing delays.

HubSpot and Notion are updated independently with no synchronization, resulting in duplicated effort and misaligned status.

Management has no real-time view of pipeline health or project status. Reporting requires manual data collection from multiple tools.

Target Operating Model

HubSpot automations handle lead handoff notifications to delivery as soon as a deal is closed, with no manual step required.

Zapier triggers initiate Notion onboarding checklists automatically when a new client is created in HubSpot.

Slack workflow automation delivers weekly pipeline and project status digests to the relevant team channels.

A shared Notion dashboard centralizes project status, client health and delivery KPIs with governance rules and defined owners.

Strategic Roadmap

PHASE 1 · 0-30 DAYS

Workflow Stabilization

Map the full lead ' onboarding ' delivery cycle across HubSpot, Notion and Slack, then identify the 3 manual synchronization points with the highest time cost.

- › Document each handoff step with owner, tool and current delay
- › Define standardized HubSpot deal stages that trigger Notion onboarding creation
- › Agree on a shared Slack channel structure for sales-to-delivery communication

KPI Average handoff time (target: -40%)

PHASE 2 · 31-60 DAYS

Automation Orchestration

Deploy Zapier automations connecting HubSpot deal stages to Notion onboarding pages and Slack notifications, eliminating the top manual touchpoints.

- › Configure Zapier trigger: HubSpot deal closed creates a Notion client project from template
- › Automate Slack notification to delivery channel on new onboarding creation
- › Set up HubSpot follow-up sequences for post-proposal and post-onboarding touchpoints

KPI Manual coordination hours saved per week

PHASE 3 · 61-90 DAYS

Operational Visibility

Build a shared Notion dashboard consolidating pipeline health, onboarding status and delivery KPIs, with governance rules and weekly automated reporting.

- › Create Notion dashboard with pipeline conversion rate, active onboardings and delivery status
- › Set up weekly Slack digest with pipeline and project health metrics
- › Define KPI ownership and review cadence for the first 90-day retrospective

KPI KPI coverage on active pipeline and delivery (target: 100%)

Recommended Operational Stack

01

Workflow Automation

Operational automations, status changes and system synchronization.

HubSpot CRM automation

Zapier workflow automation

02

Team Coordination

Notifications, follow-ups and coordination across operational teams.

Slack workflow automation

03

Operational Visibility

Dashboards, KPIs and management control over recurring activities.

Notion project database

Google Workspace automation

Risks and Adoption

Slow adoption if the first automation adds steps rather than removing them. Validate the Zapier trigger with the full sales-to-delivery team before rollout.

HubSpot data quality is inconsistent. Incomplete deal records will cause blank or incorrect Notion onboarding pages, undermining trust in the automation.

Zapier integration failures may silently skip steps. Configure error notifications and a manual fallback checklist.

Without a post-implementation governance review, the team may revert to informal Slack messages and Excel instead of the structured workflow.

Quick Wins

Configure the HubSpot deal-closed trigger in Zapier to create a Notion onboarding page. This eliminates the most common manual handoff within 7 days.

Set up a Slack #new-client channel with an automated message template so delivery always receives consistent context at deal close.

Replace the Excel pipeline tracker with a HubSpot saved view shared with management. This removes one manual reporting step immediately.

Next Step

The highest-leverage first step is to map the current deal-closed to onboarding-started sequence in a single working session with the sales and delivery leads. Before any automation is built, agree on the exact HubSpot deal stage that marks handoff readiness, the Notion template structure for new clients, and who owns each step. Once alignment is confirmed, configure the Zapier trigger in test mode and run three real deals through it before activating it in production. Success in the first 30 days means zero missed handoffs and a measurable reduction in the time between deal close and first delivery action. Track this as your baseline KPI before expanding to the next workflow.