Hubjoy

RevOps Playbook 2027

From first touch to qualified pipeline, retained customers and expansion

01 Traffic generation

Content
- LinkedIn
- X
- YouTube
- Website

Partnerships
- Directories
- Influencers
- Integrations
- Hubjoy Agencies

Paid media
- LinkedIn
- Meta
- Google
- Reddit

Outbound
- Email
- DMs
- Calls
- Events

02 Lead capture

Social profiles
- LinkedIn

Website
- Webflow

Social signals
- Phantom

Form fills
- HubSpot

Gated content
- Tally

Free trial
- Clerk

03 Sales-led engagement

Digital marketing
- Newsletter
- Email flows
- Retargeting
- Social content

Website resources
- Webinars
- Case studies
- Product demo
- Free tools

Field marketing
- Gifts
- Partner events
- Dinner invites
- Community

04 Qualification

Meeting booked
- Chili Piper
- RevenueHero

Feeds the Connected lead stage

Qualification support
- Claygent
- ChatGPT

Supports fit and intent review

05 Sales process

Sales tool stack
- Apollo
- Hyperbound
- Nooks
- Qwilr
- HubSpot
- PandaDoc

FinOps
- Mercury
- QBO
- Maxio
- QuotaPath

06 Retention & expansion

Product usage & customer health
- Amplitude
- PostHog
- Linear

Customer relationships & advocacy
- HubSpot
- Deeto
- Vitally

LEAD NURTURE + SCORING · MQL to SQL

LIFECYCLE STAGE

A contact's progression through the buyer journey

Lead → **MQL** → **SQL** → **Opportunity** → **Customer**

Capture + profile · Fit + engagement threshold · Qualification passed · Expressed interest + sales acceptance · Closed won

LEAD STAGE

New → Attempting → Connected → Qualified

Lead types: New business · Re-attempting · Upsell

OUTREACH INTENSITY

High touch	Medium touch	Low touch
Manual outreach	Automated outreach	Automated outreach
Nooks	Instantly	Instantly
Apollo	FirstTouch	

LEAD STATUS

New → Prospect → Contacted → Engaged

Qualification gate
Fit · intent · readiness

Unqualified

Recycle / nurture	Disqualified
Nurture sequence	No fit · invalid record
Timing or budget	Close out with reason

DEAL STAGE

Deal opened / sales handoff → Discovery → Deep dive → Closing → Proposal signed

Closing → Closed lost

Closed won creates a customer

Proposal signed → Closed won → Active customer

Renewed

RENEWAL PIPELINE

3 mo to renewal → <1 mo to renewal → Contract sent

Not recovered

Account at risk → Churned / past customer

Eligible closed-lost leads can recycle

NURTURE / RE-ATTEMPT WHEN READY

RETAIN · EXPAND · ADVOCATE

EXPANSION OPPORTUNITY / NEW UPSELL LEAD

Data routing & sales preparation

Keep captured leads enriched, assigned and ready for follow-up.

CRM		Data enrichment & agents
HubSpot, Salesforce	Sync	Clay, Claude, ChatGPT, Railway

ASSIGN · RESEARCH · NOTIFY

Route to reps → Account research → Notify in Slack

Ownership, context and a clear next action for every lead.

Lifecycle stage
Lead · MQL · SQL · Opportunity · Customer

Lead stage / status
Sales activity and contact engagement

Deal stage
Discovery through won or lost

Customer / renewal
Adoption, renewal, risk and expansion