

— AI COMPANY ASSESSMENT

# AI Tools Assessment

*Prepared for CamoAg*

Assessment Date: 2025-11-04

# Your 45-Minute Assessment

During our call, VP of Sales Marcus Rivera walked us through CamoAg's sales workflow across the 5-person sales team. Here's what stood out:

- **Monday mornings are lost to manual research.** Your reps are sifting through 200+ weekly site visitors in LinkedIn and Google before they can start outreach — easily 4+ hours before a single email goes out.
- **HubSpot data is decaying.** Contact records are missing company size, industry, and tech stack. Marcus estimated 40% of records have incomplete or outdated fields, making segmentation and scoring impossible.
- **Meeting follow-ups live in email threads.** There's no structured note-taking system. Action items from prospect calls get buried, and reps are relying on memory to track next steps.
- **Sales inbox is buried in noise.** Cold outreach, vendor pitches, and internal notifications are mixed in with actual deal-related emails. Reps estimate they spend 30+ minutes/day just finding what matters.

**Current tools:** HubSpot CRM, Gmail, Google Calendar, LinkedIn Sales Navigator

Bottom line: we found **14+ hours/week of recoverable time** across your 5-person sales team.

# Impact-Effort Matrix

Your pain points mapped to four quadrants. This report focuses on Quick Wins — high value, low effort.

## Quick Wins

HIGH IMPACT · LOW EFFORT

## Major Projects

HIGH IMPACT · HIGH EFFORT

## Ignore These

LOW IMPACT · LOW EFFORT

## Fill-ins

LOW IMPACT · HIGH EFFORT

## Quick Wins

- 01 No CRM logging or meeting notes → Fathom
- 02 Manual prospect research → Clay
- 03 HubSpot data decaying → Clearbit enrichment
- 04 Sales inbox buried in noise → SaneBox

## Major Projects

- 01 Custom Claude prospect ranking agent

# Quick Wins

01

## Meeting notes and CRM logging are manual and inconsistent

### FATHOM

Auto-joins every call, captures transcripts, and logs summaries + action items directly to HubSpot. Your reps stop typing and start selling. Since you're already on HubSpot, the integration is native.

Complexity: **plug-and-play** Cost: **\$19/user × 5** Setup: **15 min** Time Saved: **3 hrs/week**

02

## Reps spending 4+ hours/week manually researching prospects

### CLAY

Automated prospect research pipeline — pulls firmographic data, LinkedIn signals, and funding info. Your reps get a structured brief on every visitor instead of starting from a blank Google search.

Complexity: **some setup** Cost: **\$149/mo** Setup: **2-3 hrs** Time Saved: **5 hrs/week**

03

## 40% of HubSpot records missing key fields

### CLEARBIT (FREE HUBSPOT NATIVE)

HubSpot's built-in Clearbit enrichment automatically fills in company size, industry, tech stack, and role data on new and existing contacts. No separate subscription needed — it's included in your HubSpot plan.

Complexity: **plug-and-play** Cost: **\$0 (native)** Setup: **30 min** Time Saved: **3 hrs/week**

04

## 30+ minutes/day lost to inbox noise across the sales team

### SANEBOX

AI inbox triage that learns which emails matter. Deal-related emails surface first; vendor spam, cold outreach, and newsletters move to SaneLater. Works with Gmail — no

# Your 4-Day Quick Wins Plan

## DAY 1

**Set up Fathom for all 5 reps, connect to Google Calendar + HubSpot**

Fathom · 15 min

## DAY 2

**Roll out SaneBox across all 5 sales inboxes**

SaneBox · 10 min

## DAY 3

**Build Clay prospect research table, connect LinkedIn + data sources**

Clay · 2-3 hrs

## DAY 4

**Enable Clearbit native enrichment in HubSpot, run backfill on existing contacts**

Clearbit · 30 min

— FINANCIAL IMPACT

# The Math

Based on \$100/hour loaded employee cost · 4.33 weeks/month

TOOL	TIME SAVED	MONTHLY VALUE	MONTHLY COST
Fathom	3 hrs/week	\$1,299	\$95
Clay	5 hrs/week	\$2,165	\$149
Clearbit (native)	3 hrs/week	\$1,299	\$0
SaneBox	3 hrs/week	\$1,299	\$35
<b>Total</b>	<b>14 hrs/week</b>	<b>\$6,062</b>	<b>\$279</b>

MONTHLY NET ROI

**\$5,783**

ANNUAL NET ROI

**\$69,396**

PAYBACK PERIOD

**< 1 week**

# What Comes Next

Once quick wins are running, these high-impact projects are worth scoping.

## Custom Claude Prospect Ranking Agent

An AI agent that scores your 200+ weekly visitors by deal potential — pulling from site analytics, HubSpot, and Clearbit data — and delivers a ranked top-20 list to Slack every Monday at 8 AM.

\$8K – 15K 2-3 weeks

## Slack Deal-Room Automation

Auto-create a dedicated Slack channel for each qualified deal with contact context, HubSpot data, and next steps pre-loaded. Close the loop between prospecting and execution.

\$3K – 5K 1-2 weeks

## HubSpot Pipeline Scoring

AI-driven pipeline scoring that flags stale deals, predicts close probability, and surfaces at-risk opportunities before they slip — giving Marcus a real-time view of pipeline health.

\$4K – 7K 2 weeks

— YOUR NEXT STEPS

# Start Monday.

1

## Implement the 4 Quick Wins

Follow the 4-day plan to give your sales team 14 hours/week back. Total setup time: under 4 hours. ROI starts week one.

2

## Schedule a 30-minute Review Call

Two weeks after implementation, we'll review what's working and scope the custom prospect ranking agent if you're ready for phase two.

[Schedule Your Review Call →](#)