BRAND FUEL

The New Business Engine

How a lead becomes a customer, from first touch to closed won.

This is the high level version. It shows the path a lead takes through the business and who owns each step. It is meant to be skimmed, not studied. The detailed playbooks, scripts, and CRM build sit underneath it.

What this covers	Marketing through to a won deal
Who it is for	Owners and senior leadership
The system	HubSpot for new business, CommonSku after the win

THE BIG PICTURE

One path, three handoffs

Brand Fuel has grown into a strong, $25M business on the back of great relationships and the owners' selling instincts. That's a real foundation, and it's exactly why now is the right moment to build the engine that lets growth keep going without leaning on those same few people. The opportunity is to give every lead a clear path through the business, so the next stage of growth is more predictable and less dependent on any one person.

The engine fixes that. Every lead, inbound or outbound, follows the same path. Marketing brings it in. An SDR works it and qualifies it. An AE runs the deal and closes it. Three roles, three clean handoffs, one system tracking the whole thing.

01	→	02	→	03	→	✓
MARKETING		**SDR**		**AE**		**CLOSED WON**
Brings the lead in		Works and qualifies it		Runs the deal		Deal is won

HUBSPOT tracks the lead from first touch to closed won	COMMONSKU takes over

One thing to be clear on up front. HubSpot runs the new business pipeline, from the first touch to the moment a deal is won. It does not book or fulfill the order. That all happens in CommonSku, same as today. HubSpot's job ends at closed won. Keeping the two separate is the cleaner setup, not a workaround.

STAGE ONE

Marketing brings in the lead

Marketing's job is to put qualified leads into the top of the pipeline. The focus is quality over volume, leads that look like the customers Brand Fuel does its best work with. That means leads match the ideal customer profile, the picture of who the best customers are. Pointing marketing at the right targets is where the leverage is.

STAGE 1 OWNER: Alysse HubSpot	**Fill the top of the pipeline with the right leads** — Inbound: run the website, content, and campaigns so the right kind of buyer raises their hand and lands in HubSpot. — Outbound: build target lead lists that match the ideal customer profile and hand them to the SDR team, so the SDRs spend their time selling, not hunting for names. — Track every dollar of marketing spend against the leads it actually produces, not vanity numbers like clicks or impressions. — Capture every lead in HubSpot automatically, so nothing lives in someone's inbox or head.

The outbound list piece is the part worth highlighting. Alysse owns building the lead lists for the SDRs. When the SDR team is handed a clean list of the right targets, all of their time goes straight into outreach and conversations. It also keeps the whole team aimed at the same kind of high-value customer, which makes every part of the engine pull in one direction.

WHAT GOOD LOOKS LIKE

WHAT TO WATCH	WHY IT MATTERS	TARGET
ICP leads per month	The number that matters. Leads that match the target customer, not just clicks.	TBD
Cost per ICP lead	What it costs to produce one good lead. Tells you which spend is working.	TBD
Outbound lists delivered	Lists handed to the SDR team on time, so they always have targets to work.	TBD
Lead to discovery rate	Of the leads marketing sends, how many turn into a real conversation.	TBD

↓ Lead is captured in HubSpot and routed to an SDR ↓

STAGE TWO

The SDR works and qualifies it

This is the role that unlocks the whole engine, and it's a fresh opportunity to build it exactly right. The SDR (sales development rep) is the first human contact a lead has with Brand Fuel. Their job is simple to say and valuable to do well: get the lead on a discovery call and figure out if it's a strong fit.

Not every lead is the same, though. An inbound lead raised their hand. They filled out a form or replied to something, so they already know who Brand Fuel is and they're expecting a call. An outbound lead is cold. They're a good fit on paper, from one of Alysse's target lists, but they haven't asked to hear from anyone. Those two need different handling, so the SDR runs a different play for each.

STAGE 2 OWNER: SDR HubSpot	**Make contact fast and qualify the lead** — Inbound: when a lead raises their hand, call within minutes, not hours. Speed is the whole game here. — Outbound: work cold prospects with a steady, persistent sequence over a few weeks until they engage. — The first call has one job either way: book a discovery conversation. It is not a pitch and it is not a demo. — Qualify against the ideal customer profile. A local shop wanting twenty hats is not a lead. An ICP fit is. — Log everything in HubSpot and move the qualified ones to an AE.

The thing that makes this role work is matching the energy to the lead. An inbound lead is hot for about five minutes, so the win is getting to them before that interest cools. An outbound lead was never hot, so the win there is persistence, showing up enough times to earn the conversation. Same rep, two different rhythms.

WHAT GOOD LOOKS LIKE

WHAT TO WATCH	WHY IT MATTERS	TARGET
Activity per day	Dials, emails, and LinkedIn touches out the door. The input that everything else depends on.	TBD
Discovery calls booked	The real output of the role. Conversations handed to an AE.	TBD
Lead to discovery rate	Of the leads worked, how many turn into a booked discovery call.	TBD

Working an inbound lead

Someone raised their hand. They're expecting to hear back, and every minute that passes makes them colder. So the inbound play is fast and heavy up front. Hit them hard in the first couple of days while the interest is still fresh, then ease off if they go quiet. LinkedIn comes in later, only if the calls and emails aren't landing.

INBOUND CADENCE

WHEN	TOUCH	WHAT HAPPENS
Day 1, AM	**Call + email**	Call within minutes of the lead coming in. If no answer, leave a voicemail and email right away.
Day 1, PM	**Call**	Call again the same day at a different time. They just reached out, so they're worth a second try today.
Day 2	**Call + email**	Another call, plus a short email that references why they reached out in the first place.
Day 3	**Call**	Third day, another call. Most inbound leads that convert are reached in the first few days.
Day 5	**Email + LinkedIn**	If still no answer, send a follow-up email and a LinkedIn connection with a short note.
Day 8	**Call + email**	One more call and a light check-in email. Interest may have cooled, so keep it easy to re-engage.
Day 12	**Email**	A short break-up email. Makes it easy to reply and shakes loose the ones who got busy.
After	**Recycle**	Still nothing? Move them into a longer nurture. They were interested once, they may be again.

Working an outbound lead

This prospect never asked to hear from Brand Fuel. They're a strong fit, but cold, so the job is to earn attention over time without being a pest. The outbound play is steadier and runs longer. Spread the touches out, mix the channels, and lean on LinkedIn more, since a cold prospect often warms up to a familiar name before they'll take a call.

OUTBOUND CADENCE

WHEN	TOUCH	WHAT HAPPENS
Day 1	**Call + email**	Open with a call. If no answer, leave a voicemail and send a short, relevant intro email.
Day 2	**LinkedIn**	Send a connection request with a short, personal note. No pitch. Just put a face to the name.

WHEN	TOUCH	WHAT HAPPENS
Day 4	**Call**	Call again at a different time of day. People who miss a morning call often pick up in the afternoon.
Day 7	**Email**	A value email. Share something relevant to their world, a result, an idea, a useful resource.
Day 9	**Call + LinkedIn**	Call once more, then engage with a recent post so the name keeps showing up.
Day 13	**Call**	Mid-point call. Persistence is the job. Most reps quit before this point and leave good leads on the table.
Day 17	**Email**	Another value email, a different angle from the first. Keep proving there's a reason to talk.
Day 21	**Call + email**	Final call and a short break-up email that makes it easy to reply.
After	**Recycle**	If still no answer, the prospect goes back into a longer nurture. Not dead, just not now.

The exact days and number of touches will get tuned once the team is running and we can see what's working. The scripts, email templates, and LinkedIn notes sit underneath this, in the detailed playbook. What matters at this level is the shape: hit inbound leads fast and hard while they're warm, and work outbound prospects with steady persistence over time. Getting these two plays right is one of the fastest wins available, it makes sure every good lead gets a real shot.

↓ **Qualified lead becomes a deal and moves to an AE** ↓

STAGE THREE

The AE runs the deal and closes it

Once a lead is qualified, it becomes a deal and an account executive (AE) takes it. The AE owns the deal from the discovery conversation through to a yes. This is where the relationship gets built and the order gets shaped.

STAGE
3
OWNER: AE
HubSpot

Carry the deal to a decision

- Run the full discovery and scope what the customer actually wants.
- Pull in an online stores expert from the operations team for technical support when a deal needs that depth.
- Move the deal through clear pipeline stages in HubSpot, so leadership can see what is real and what is stuck.
- Work the deal to a yes or a no. Both are useful. A clear no beats a deal that drags for months.
- When it is a yes, the deal is marked closed won. That is the last thing HubSpot does for this order.

The deal stages in HubSpot are what give Lyle and the owners real pipeline visibility. The pipeline shows exactly where every deal stands at a glance. That's what makes revenue something you can forecast and plan around, instead of something you wait to see how it lands.

WHAT GOOD LOOKS LIKE

WHAT TO WATCH	WHY IT MATTERS	TARGET
Deals won per month	The number that matters most. New business actually closed.	TBD
Win rate	Of the deals worked, how many close. Tells you if the right leads are coming through.	TBD
Average time to close	How long a deal takes from discovery to won. Shorter is healthier.	TBD
Pipeline coverage	Enough active deals in flight to hit the target. Thin pipeline now means a slow month later.	TBD

The discovery meeting

Discovery is the heart of the AE's job, and it's where most promo deals are won or lost. It's a real conversation, usually 30 to 45 minutes, where the AE's only goal is to understand the customer's world before saying a word about what Brand Fuel can do. The SDR's first call just booked this meeting. Discovery is where the actual selling starts.

The reason it matters so much is simple. A customer who feels understood buys. A customer who gets pitched at shops around. Most promo companies skip straight to showing products, which turns the whole thing into a price comparison. When the AE slows down and gets the full picture first, the proposal that follows lands as the obvious answer rather than one quote among five.

The AE runs discovery against a simple framework called BANT. It stands for Budget, Authority, Need, and Timing, and it's just a way to make sure the AE walks out of the meeting knowing the four things that decide whether a deal is real. The trick is to uncover them through natural conversation, not by reading off a checklist.

- Budget. What are they able to spend? The AE doesn't need an exact number, but a rough range keeps everyone from wasting time on a proposal that was never realistic.
- Authority. Who actually makes this call? Often the person in the room is a champion, not the final signer. The AE needs to know who else has to say yes so the deal doesn't stall late.
- Need. What are they really trying to accomplish? A new hire kit, an event, a recognition program. The merch is the means, not the goal, and the clearer the need, the sharper the proposal.
- Timing. When does this need to happen? An event date or a program launch sets the clock and tells the AE how to prioritize the deal.

Alongside BANT, two more things matter on a promo deal. Who the merch is for and what it needs to feel like, so the AE understands the audience and the brand standard. And whether an online store is part of the picture, which is when the AE pulls in an online stores expert from operations for the technical side.

On a more complex deal, the AE doesn't have to have every answer in the room. That's why they bring in an online stores expert from operations, someone who knows the technical and operational side cold and can speak to it on the spot. The AE runs the relationship and the conversation, the operations expert covers the depth.

Presenting back to the client

After discovery, the AE comes back with a proposal. This is not a price sheet emailed over and left to sit. The AE walks the client through it, in person or on a call, and frames it around what they heard in discovery. The whole point is that the client recognizes their own goals in the proposal.

A strong presentation does a few things. It restates the client's goal in the client's own words, so they know they were heard. It shows how the recommended products and approach solve that specific goal, not a generic catalogue dump. It's clear on price, timeline, and what happens next. And it makes the decision easy by giving a clear recommendation rather than a wall of options.

Done well, the presentation doesn't feel like a sales pitch. It feels like a partner handing back a plan the client helped build. That's what separates Brand Fuel from a vendor sending a quote, and it's what turns a discovery conversation into a closed deal.

The pipeline is just the deal moving through clear stages, from a first conversation to a yes or a no. Every deal sits in one stage at a time, and moving it forward means something specific happened. This is what turns a pile of maybes into a forecast leadership can trust.

1	**Discovery**	First real conversation. The AE digs into what the customer needs before pitching anything.
2	**Qualified**	It's a real fit. Budget, need, and timing check out. Worth the AE's time to pursue.
3	**Proposal**	The AE has scoped the work and put a proposal or quote in front of the buyer.
4	**Negotiation**	The buyer is engaged and working through details. Price, terms, scope getting nailed down.
5	**Closed Won**	The customer said yes. This is the finish line in HubSpot. The deal now moves to CommonSku.
×	**Closed Lost**	A no, or it went quiet. Logged with a reason so the team learns what to fix.

Keeping the pipeline honest

The pipeline is most valuable when it reflects reality. Two simple habits keep it that way. First, every deal has a clear next step and a date, so it always has momentum. Second, deals that go quiet move to closed lost, which keeps the forecast clean and trustworthy.

Lyle runs a short pipeline review with the AEs each week. It's a working session to push deals forward, give attention to the ones that need it, and line up the next move on each. That weekly rhythm is what keeps deals progressing and revenue building steadily.

↓ **Deal marked CLOSED WON in HubSpot** ↓

THE HANDOFF

Closed won is where HubSpot stops

This is the line that keeps the system clean. The moment a deal is won, the new business job is done. HubSpot tracked the lead from first touch all the way to the win. Now the work moves to CommonSku, where the order actually gets built and fulfilled, the same way it happens today.

HUBSPOT	COMMONSKU
New business First touch through closed won. Marketing, SDR, and AE all work here. This is where the pipeline lives.	**Everything after** The won deal moves here. The order gets booked, built, and fulfilled. The AE works the plan in CommonSku from this point.

Why keep them separate instead of forcing one tool to do both? Because they're two different jobs. Winning the business and delivering the order need different things from a system. HubSpot is built for the chase. CommonSku is built for the build. Trying to make either one do both jobs makes both worse. The clean handoff at closed won is the right design.

AT A GLANCE

Who owns what

If you remember nothing else, remember this. Each step has one clear owner. That clarity is what lets the team move fast, every lead has someone responsible for it, and everyone knows exactly where their job starts and ends.

STAGE	OWNER	WHAT THEY'RE ON THE HOOK FOR
Marketing	Alysse	Inbound leads, outbound target lists for the SDRs, spend tied to real leads
SDR	New hire (reports to Lyle)	Fast contact, discovery booking, qualifying against the ICP
AE	Account executive	Running the deal through the pipeline to closed won
After the win	AE in CommonSku	Booking and fulfilling the order, same as today

WHAT THIS GETS YOU

The point of all this

Every lead gets worked the same strong way, every time. The owners can see the full pipeline at a glance. Growth becomes something the team drives together, which frees Danny and Robert to focus on the highest-value work only they can do. And when it's time to scale, you add SDRs and AEs into a system that already works, so new hires get productive fast.

This is the skim version. The detailed playbooks, call scripts, qualifying criteria, and the HubSpot build all sit underneath it. Start here, then go a layer deeper where it matters.

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