

**Manan.**

CRM · REVOPS · AUTOMATION

CASE STUDY

LIFECYCLE MARKETING

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HUBSPOT · CUSTOM APPAREL MANUFACTURING

# A 23-stage production pipeline, translated into a customer conversation.

Designing the automated email layer for a custom sports apparel manufacturer, where the operations were already automated and the customer had never been told anything.

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CLIENT

**Sports Plus**

Custom team apparel & decoration

DISCIPLINE

**Lifecycle architecture**

Copy, mapping, workflow audit

ENGINEERED BY

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CRM, RevOps & Automation Engineer

# The operations were automated. The customer was not.

Sports Plus manufactures and decorates custom apparel for schools, clubs, leagues and businesses. Their HubSpot portal is heavily built: three pipelines, 123 live workflows, and a Make.com layer pushing work orders into Google Sheets and invoices into QuickBooks.

Every one of those automations points inward. Work orders route to purchasing. Stall alerts route to the owner. Webhooks route to accounts. Almost nothing routes to the person who placed the order and is waiting on it.

The brief arrived vague and second hand: build automated emails for contacts based on lifecycle stage and deal stage, sent from the contact and deal owners. The subject lines and body copy were supposed to come from the business itself. They never did.

So the copy became part of the engagement, and with it the harder question underneath. Writing the emails is the small half of this job. Deciding which stages deserve one is the whole of it.

## CLIENT

Sports Plus  
Custom sports apparel

## PLATFORM

HubSpot Marketing & Sales,  
Make.com, QuickBooks Online

## ROLE

CRM & lifecycle architecture,  
copywriting, automation audit

## OBJECTS IN SCOPE

Contacts, Deals, Line Items

## DELIVERABLE

Build-ready email specification  
with triggers, timing, senders and  
tokens

|                       |                             |                                 |                              |                                    |
|-----------------------|-----------------------------|---------------------------------|------------------------------|------------------------------------|
| 23                    | 7                           | 34                              | 4                            | 7                                  |
| DEAL STAGES<br>MAPPED | LIFECYCLE STAGES<br>COVERED | EMAILS WRITTEN<br>AND SPECIFIED | FULFILMENT PATHS<br>BRANCHED | STAGES LEFT<br>DELIBERATELY SILENT |

*A pipeline stage is not a customer moment. Most of these 23 exist because a shop floor needs them, and a buyer will never care that a work order was approved.*

# Three problems, only one of which was the one I was handed.

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## 01 A pipeline designed for the shop floor, pointed at a buyer

The Sales Pipeline carries 23 stages because production genuinely needs them: work order created, work order complete, work order approved, artwork prepped, purchase order placed, invoice generated, QuickBooks invoice created. Automating an email on each one would have put more than twenty messages in front of one customer for one order, and trained them to ignore all of it by the third.

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## 02 No source copy, and no voice to match

The content was meant to come from the business. Without it there were no existing promises on file, no tone reference and no turnaround times to quote. Every line had to be safe to send from any rep's inbox, on day one, without that rep having read it first. That constraint shaped the writing more than any brief would have.

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## 03 An automation estate that already emails people

Across 123 live workflows and 13 live Make.com scenarios, several already send to contacts at exactly the moments a lifecycle programme would want: a ship-method branch at Production Complete, a notification at Ready for Pick Up, a pick up and drop off selection form. New emails layered on top would have doubled up on the same event, from the same sender, on the same day.

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*The client asked for emails for every stage. The valuable answer was a shorter list, and the reasoning to defend it.*

# Audit first, classify second, write last.

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01

## Map the estate before writing a word

The full workflow and Make.com audit came first: what fires, to whom, at which stage, and where a webhook hands control to an external system. Nothing was drafted until it was clear which moments were already spoken for.

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02

## Classify every stage as a moment, a handoff or a stall

Each of the 23 deal stages was sorted into one of three buckets. Sixteen were customer moments and earned an email. Seven were internal handoffs and were left silent to the customer, with internal notification copy written instead. Two were reclassified as stall triggers, fired on a delay so they only reach customers whose order has actually slowed.

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03

## Give the customer the whole map at the start

A single orientation email at the Opportunity stage sets out the five steps of an order from mock-up to invoice. It is the reason every later email in the sequence can run three lines long without reading as abrupt, and it is what makes silence during production feel expected rather than ignored.

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04

## Branch on decoration type, because lead time depends on it

In-house decoration, drop ship, hard goods and custom decoration each carry a different answer to the only two questions a waiting customer has: who is holding my order, and how long will it take. Four versions of the Order Placed email, one per fulfilment path, each setting an honest expectation rather than a generic one.

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05

## Write it so a sales rep would actually press send

Every customer email sends from the record owner, signs with their first name and returns replies to their inbox. Short sentences, one ask per email, no marketing register. If a rep would be embarrassed to have written it, it did not go in.

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# Where the customer hears from us, and where they do not.

● Customer email    ○ Internal only, no customer email

## Enquiry

● Opportunity

● Mock-up Needed · delayed

● Mock Up Completed

## Approval & handoff

● Quote Approved

○ Sales Handoff

○ Create Work Order

○ Work Order Complete

○ Work Order Approved

## Ordering & artwork

● Order Placed · 4 variants

○ Prepare Artwork

● Artwork Ready for Production

## Waiting & production

● Awaiting Custom / Hard Good Order

● Awaiting Items for Decoration

● Production On Deck

● Production Complete

## Fulfilment

● Drop Ship Deal

● Ready for Pickup

## Billing & close

○ Generate Invoice

○ Create QuickBooks Invoice

● Invoice Needs Information

● Invoice Sent

● Invoice Paid

● Closed Lost

### The silence is the design decision

Seven stages send nothing to the customer. Two more fire only on a delay, so a fast order never triggers them at all. The result is a buyer who hears from us at **a handful of real moments** in an order rather than twenty, and a sales team whose emails still get opened by the time the invoice arrives.

# Automated, but indistinguishable from a rep typing.

## SPECIMEN · DEAL STAGE: MOCK UP COMPLETED

**From** {{ deal.owner\_firstname }}, Sports Plus  
**Trigger** Deal stage becomes Mock Up Completed  
**Your mock-up is ready to review**

Hi {{ contact.firstname }},

Your mock-up for {{ deal.dealname }} is ready. Have a look and check three things: spelling, colours and logo placement.

Reply with "approved" and I will send the quote. If something needs changing, tell me what and we will revise it.

We cannot start production until this is signed off, so the sooner you come back to me the better your date looks.

## SPECIMEN · DECORATION TYPE: HARD GOODS

**Branch** Decoration Type = Hard Goods / Special Order

**Your special order is placed**

These items are a special order, so they are made or pulled to order by the supplier rather than sitting in our stock.

That usually means [lead time] before they reach us, and decoration starts the day they land. Supplier dates can move, and if that happens you will hear it from me before you have to ask.

## THE VOICE RULES

- **One ask per email.** If a message needs two things from the customer, it becomes two messages or it gets cut.
- **Say what changed and what happens next.** An update with neither is noise.
- **Name the constraint honestly.** Supplier lead times move. Saying so up front turns a delay into information rather than a complaint.
- **No marketing register.** No exclamation marks, no excitement, no phrases a rep would never type.
- **Signed by a person.** Owner's first name, owner's address, replies to owner's inbox.
- **Fifty to a hundred words.** Long enough to be useful, short enough to be read on a phone between jobs.

Every email specifies its trigger, delay, sender and personalisation tokens, with a fallback on each token so an empty CRM field never renders as a gap mid sentence.

# A specification the client can build from without asking a question.

## What shipped

- 34 emails, each with subject line, preview text and final body copy
- 7 lifecycle emails from Subscriber through to Evangelist
- 16 customer emails across the Sales Pipeline
- 4 decoration-type variants of the Order Placed message
- 7 internal notification emails for the ops-only stages
- Trigger, delay and sender defined per email
- Token reference with fallback values

## What it prevents

- The twenty-email order, and the unsubscribes that follow it
- Two automated emails landing on the same customer for the same event
- Silence through the longest wait in the process, at the supplier stages
- Reps signing copy they have never read
- Generic lead-time promises on orders that a third party controls
- Blank tokens rendering mid sentence in a live send

## HANDED OVER WITH IT

A conflict register naming the three existing workflows that already email customers at overlapping moments, flagged for reconciliation before launch, and three open values the business still needs to supply: store address, opening hours, and typical supplier lead time. Nothing was invented to fill those gaps.

## Automation is easy to add and hard to aim.

The build was never the constraint here. This portal could send an email at every one of its 23 stages tomorrow. The work was deciding which moments earn a customer's attention, and writing something worth their opening it.

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HubSpot · Make.com  
QuickBooks Online · Google Workspace