NAVVY AND GATHER 'N' GROW

When to bring in Alyssa

5 ways Navvy can bring in Alyssa:

One-off small tasks | Free audit | Paid audit | Project-based | Retainer

Book a call with Alyssa ET and BST hours are mostly suitable. Some times may look blocked out, but Alyssa can move things around, so just ask.

Feel free to introduce Alyssa by email and suggest a group call during the sales process.

Navvy doesn't need to become a HubSpot partner.

Alyssa will add Yoann as a user to the HubSpot accounts with Partner Admin access. This way it doesn't cost the prospect or customer anything.

Introducing Alyssa

For Yoann to copy and paste

I'd like to introduce Alyssa Yap, who leads HubSpot and Revenue Operations in my team at Navvy. Alyssa runs Gather 'n' Grow, a HubSpot Platinum Partner, and has 10+ years of experience connecting CRM, marketing and sales for businesses ranging from small teams to enterprise. Clients include FourthRev, Kingsmede, MicroSourcing, Probe Group, Converge International, HealthCert, Makinex and System4 IPS. Alyssa comes with B2B and B2C experience across a range of industries, and knows how to problem solve and fit HubSpot around different business needs, goals and challenges. That carries over well to travel, where every business has its own way of taking an enquiry through to a booking. Alyssa also builds AI agents into CRM and reporting work, so teams spend less time on admin and more time with customers.

How it works: high level flow for Yoann and Alyssa

Yoann

1. **Fit call** — Confirm fit and interest. (You already do this.) Ask which CRM they use and who looks after it.
2. **Bring in Alyssa** — Once fit and interest are confirmed, bring in Alyssa for a call to understand the client's CRM, data and tech stack.
5. **You scope it** — Decide how the HubSpot and CRM work fits into the overall engagement. (You lead this, as you do on every engagement.)
7. **You prepare the final proposal** — For the client. Work with Alyssa to adjust the numbers and scope of work as needed.

Alyssa

3. **Alyssa takes a look** — A free or paid CRM audit, depending on what's agreed.
4. **Alyssa reports back** — You get the findings in plain language and what to fix first.
6. **Alyssa prepares the proposal** — Covers the strategy and plans for the account.
8. **Alyssa delivers the work** — Handles delivery and communication with the client, with full visibility for you.

What to listen for

You'll spot most of these already, so this is just a reminder.

- ✓ They're on HubSpot and don't trust what's in it.
- ✓ Enquiries sit in inboxes or spreadsheets, and follow-up depends on who picks them up.
- ✓ They're choosing, moving or cleaning up a CRM.
- ✓ Nobody owns the CRM.
- ✓ The CRM doesn't connect to the booking system.
- ✓ They want to scale or grow, and the current setup won't keep up.
- ✓ They want to see how marketing leads to sales and ongoing returns.
- ✓ The sales team doesn't have a set process.
- ✓ They can't say which enquiries turn into bookings. (You already judge the work on booked revenue.)
- ✓ Marketing and the travel specialists work from different numbers. (Your Connect route already covers this.)

HubSpot partner access link

HubSpot partner access link

For now, the link will show Alyssa inviting them. Let the prospect know before you send it, so it doesn't come as a surprise.

Message to copy and paste

Alyssa Yap is part of my team at Navvy and leads our HubSpot and Revenue Operations work. To review your HubSpot, Alyssa needs access to your portal. By clicking the link below, you will be providing us Partner Admin access.

The invite will come from Alyssa at Gather 'n' Grow, a HubSpot Platinum Partner we work with. That's expected, and Alyssa is happy to sign an NDA if you'd like one.

Here's the link:
https://app.hubspot.com/l/settings/users/partnerInviteLink/NTY2ODY2NT03NjE0NjQx

When to send it

Only send it when the conversation makes it appropriate to ask, and they've said yes to Alyssa looking at their HubSpot.

If they hesitate

Alyssa is happy to sign an NDA.