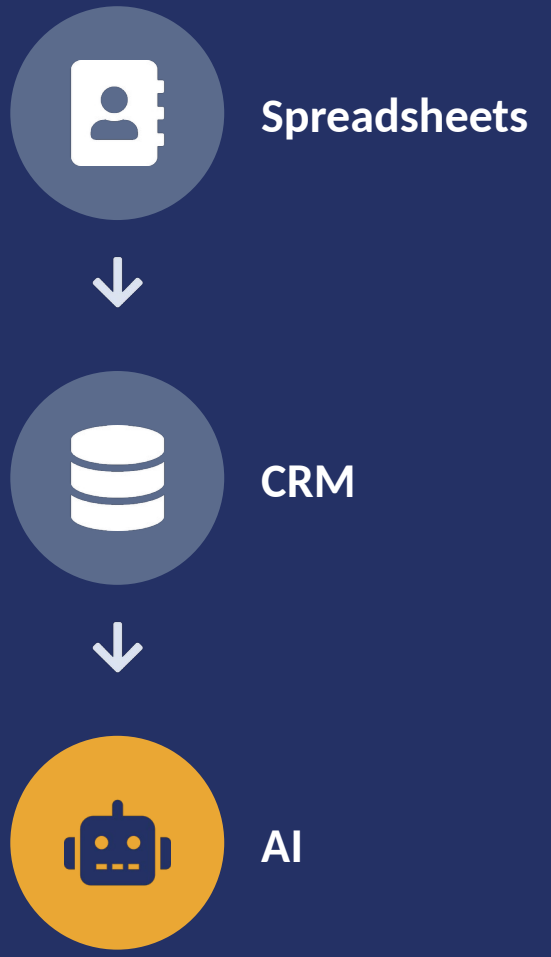
HySafe

Rolodexes, Robots, and Relationships

Sales in the age of AI

Who is your sales system actually built for?



Alex Donayre | President, HySafe

Three phases of sales tracking

	PHASE 1 Spreadsheets	PHASE 2 The CRM	PHASE 3 CRM + AI
FOR MANAGEMENT	Little insight. Hard to manage.	Data for oversight and basic forecasting.	Complex analysis, in-depth insights, tools to better coach reps.
FOR THE SALESPERSON	Fully manual, but high autonomy.	REPS CARRIED THE ADMIN Useful email logging and reminders, but also the rise of the “CRM police.”	Less admin, tools customized to each customer, more effective sales activity.

HySafe

Four jobs for AI

MANAGEMENT

TOP OF THE FUNNEL

Analyze where to invest

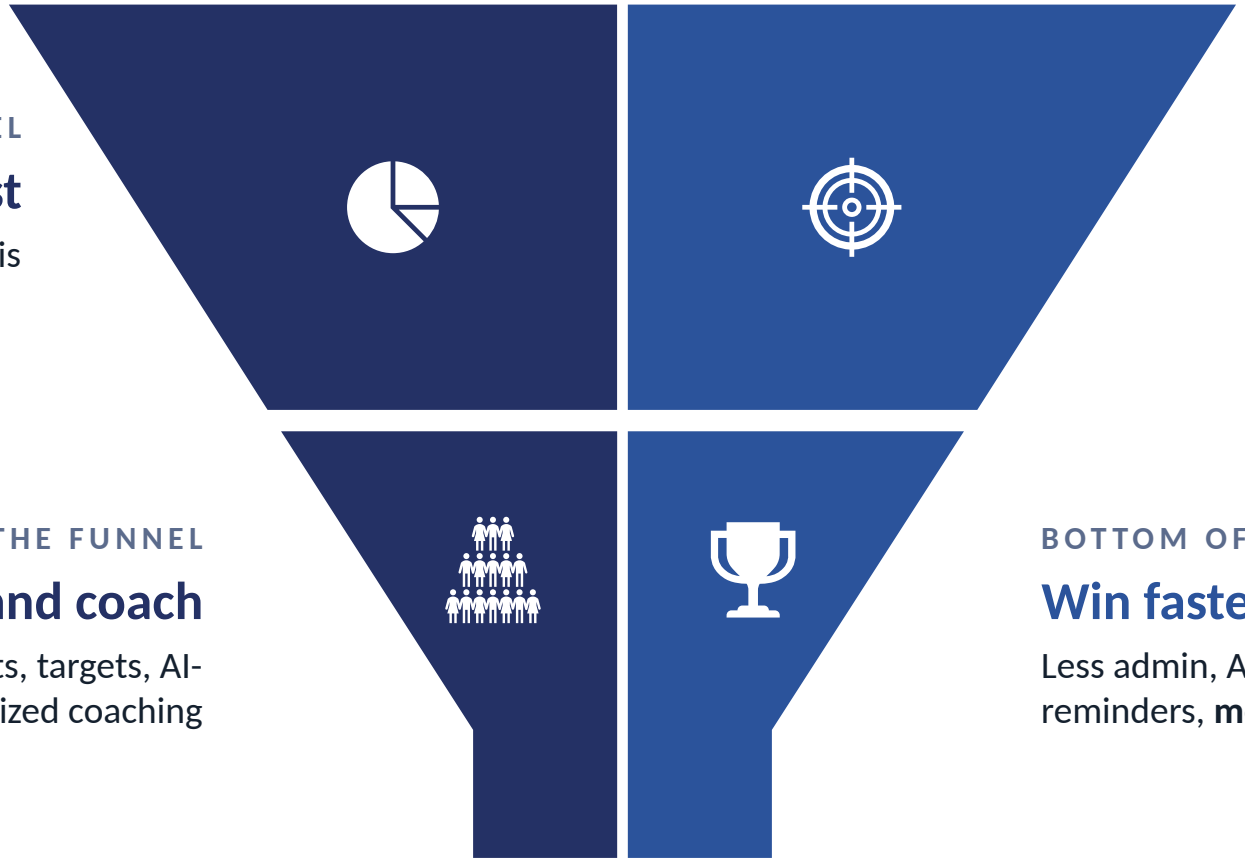
What it costs and where the return is

BOTTOM OF THE FUNNEL

Allocate time and coach

Win/loss patterns, funnel constraints, targets, AI-enabled personalized coaching

SALES TEAMS



TOP OF THE FUNNEL

Personalized follow-up

Research before the visit, personalized sales collateral after

BOTTOM OF THE FUNNEL

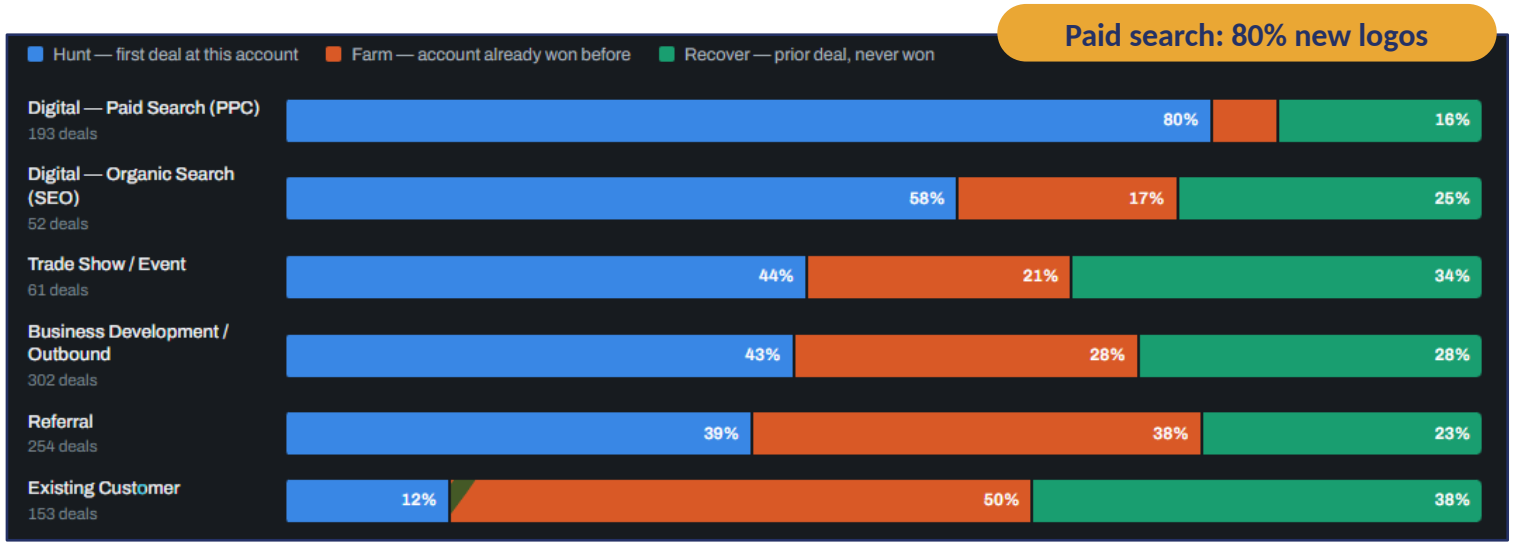
Win faster

Less admin, AI-generated call notes and reminders, **more time for customer connection**

Analyze, then invest

THE BENEFIT

Doubled paid search spend after AI showed it brings in the most new customers (80% new logos).



HOW WE DID IT

Connected Claude to HubSpot

The prompt in Claude + HubSpot:

"Classify every contact in HubSpot (core pipeline only) as a new logo, won before, or never won, and show the split by lead channel. Then use our marketing spend by channel (attached) to calculate cost per new customer, and recommend where to shift budget."

Personalized follow-up, faster

THE BENEFIT

Every customer gets personalized sales collateral, with hazards rated and solutions laid out by building.

Fab Shop



Photo 1



Photo 2



Google Earth with potential layout

- This roof area on the south side of the facility has no guardrail.
- At the 15' x 25' area, HySafe can install a complete enclosure (10' x 15' x 25' x 10') with a 6-foot return, including extra weighted bases on the northwest corner.
- The guardrail proposed is weighted guardrail and does not penetrate the roof surface.

Color-coded priority, photos, aerial layout

Summary of Recommendations

Building	Active Fall Protection	Passive Fall Protection
Physical Education Facility	7 HLL travel-restraint systems (approx. 1,824 LF); relocate 2 single-point anchors	2 crossover step units; 3'-10'-3' guardrail; recertify existing DBI-SALA HLL (gym)
Art Building	14 HLL systems (approx. 1,242 LF); heavyweight anchors at 10 areas + 2 at hatch roof	5 ladder safety gates; 3 ladder platforms; hatch rail kit + hatch guard; approx. 114 LF guardrail; skylight screens (qty TBD)
Facilities Management	2 roof-mounted HLL systems (424' and 300'); metal roof at Area 1, precast concrete deck at Area 2	—
International Hall	4 HLL systems (approx. 465 LF); 1 heavyweight anchor	—
Person Theater	6 standing-seam HLL systems (approx. 970 LF)	—
Recreation Center	3 HLL systems (approx. 545 LF); 3 heavyweight anchors	2 hatch guards; fixed ladder; ladder platform; crossover; safety gate; approx. 36 LF guardrail

Solutions by building

6. Option Comparison

Criteria	Option 1 – Xtirpa Davit (Perimeter)	Option 2 – Overhead HLL (PEMB)
Coverage	Perimeter band, limited by arm reach; center of pit not fully covered	Full footprint of the 24 ft x 40 ft pit
Adaptability to changing layouts	High – davit moves between mounts	Moderate – fixed lines; layout changes may create obstructions
Obstruction / interference	Low – no overhead impact	Higher – lifeline and SRL interference with ducts, structures and utilities
Structural dependency	Existing perimeter concrete	PEMB rafters; engineering review required
Rescue capability	Built in (winch / rescue SRL)	Separate rescue plan required
Day-to-day use	Set up and move the davit per task	Connect and go

Options side by side

HOW WE DID IT

Used Claude before and after each visit

The prompt in Claude:

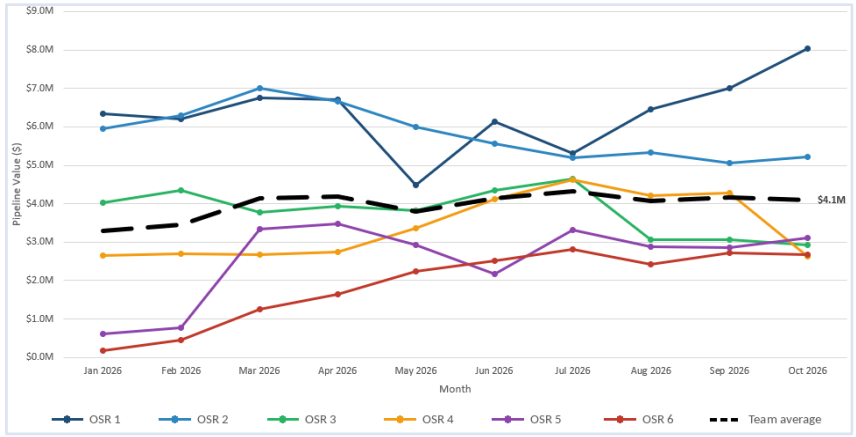
"Here are my site visit notes and photos. Group them by building, describe each hazard, and rate it red, yellow or green. Then write the follow-up assessment: recommended solutions by building, and the options side by side. Match the look and tone of our website."

Allocate time, coach reps

THE BENEFIT

Managers now see each rep's weak stage and coach to it: qualification where close rate fell 6.3 pts, prospecting where pipeline is thin.

Team — Key Metrics (YTD Jan–September)			
Close Rate ($ Won/Sent)	Awarded Deals ($)	Deals Sent ($)	Deals Created ($)
16.1%	$ 5,915,107	$ 36,838,277	$ 36,142,514
-5.3%	93%	172%	134%
pts vs Last Year's 21.4% $ Close Rate	*vs YTD Target*	*vs YTD Target*	*vs YTD Target*
Close Rate (# Won/Sent)	Awarded Deals (#)	Deals Sent (#)	Deals Created (#)
25.1%	111	442	491
-6.3%	87%	103%	91%
pts vs Last Year's 31.4% # Close Rate	*vs YTD Target*	*vs YTD Target*	*vs YTD Target*



Close rate down 6.3 pts
Coach qualification

Low pipeline
Coach prospecting

HOW WE DID IT

Connected Claude to HubSpot

The prompt in Claude + HubSpot:

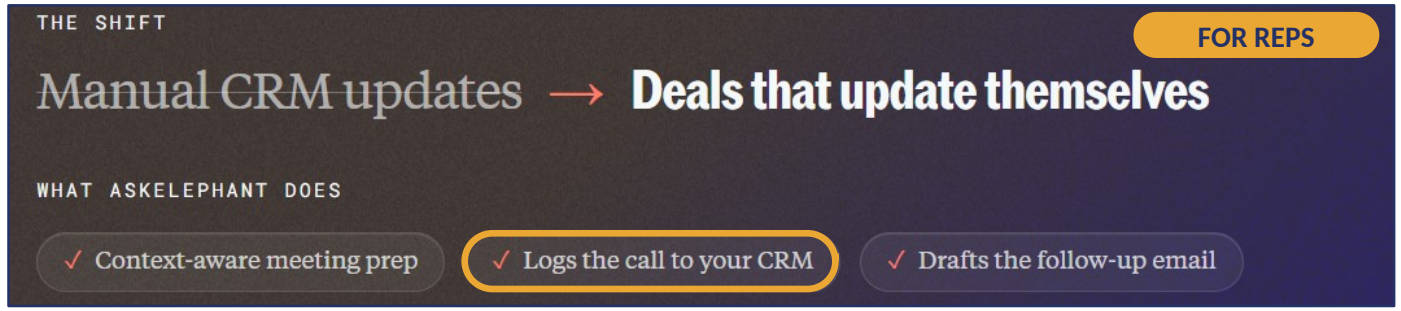
"For deals created this year, show the team's and each rep's deals created, sent and won, close rate against last year, and results against target. Chart each rep's monthly pipeline against the team average. Then name each rep's weakest funnel stage and one coaching focus."

Win faster, type less

SALES TEAMS
Bottom of funnel

THE BENEFIT | IN PROGRESS

Goal: HubSpot updates itself after every call, so reps spend less time on admin and no follow-up slips.





HOW IT WORKS | IN PROGRESS

Evaluating AI call notes

AskElephant

The flow (example tool):

1. Teams calls and meetings are recorded.
2. AI pulls out objections, next steps, and qualification.
3. HubSpot fields update automatically.
4. Follow-up tasks and reminders are created: “Send quote by Fri.”

HySafe

What's next for HySafe

Where we are today and where we are heading

NOW

- Sales: Claude connected to HubSpot for pipeline reviews
- Management: Claude connected to HubSpot for analysis, coaching, and ROI decisions
- Personalized sales collateral
- ***An external BD firm (Salaria) using AI for cold prospecting***

NEXT

- Phase 1 AI estimating tool
- Calls and Teams meetings recorded and linked to deals
- New custom CRM fields for qualification and objections
- Better data hygiene for better email marketing campaigns
- AI agents (e.g., Grok Bot) for sales admin and job processing
- ***Miro for sales process (Galaxy)***

LATER

- A centralized "brain" across Outlook, HubSpot, ERP (BC365), and Power BI for customer prioritization
- AI estimating from drawings (not just CRM)
- AI updates CRM fields automatically (e.g., AskElephant)
- ***Phase 2 AI estimating tool in the hands of sales and ultimately the customer***

Take action: three steps to start

1

Get a CRM

Start with your highest-value deals. AI can only work with recorded data.

2

Turn on what you already pay for

Email plug-in first, then connect Claude, record Teams calls, and use tasks/reminder.

3

Borrow what worked

Talk to **HySafe** or **Galaxy (Amanda)** across Canopy before you buy anything, and get help with your first questions. Bring managers and reps in early.

HySafe

In a world of AI noise, trusted relationships win.

THE SHIFT

AI makes product knowledge available to everyone.

THE NOISE

Buyers are buried in information and still buy from a foundation of trust.

THE PREMIUM

The rep who knows their customer best wins.

The irony: AI is what gives our reps the time to do that.

Who is your sales system actually built for? ***Your customer.***

Thank you