SALES · AI AGENTS · CONNECTED WORKFLOWS

Every buying signal in HubSpot, seen and acted on the same day.

Nectar for Hummingbirds, built on Chipp.

Hummingbirds had about 16,000 accounts in its ABM pool and a steady stream of buying signals that nobody saw in time. We built Nectar, a command center that ranks the brands showing intent each morning and proves whether a rep followed up. HubSpot stays the source of truth.

CLIENT
Hummingbirds

BUILT FOR
SDRs, AEs and the revenue lead

PLATFORM
Chipp · HubSpot read-only

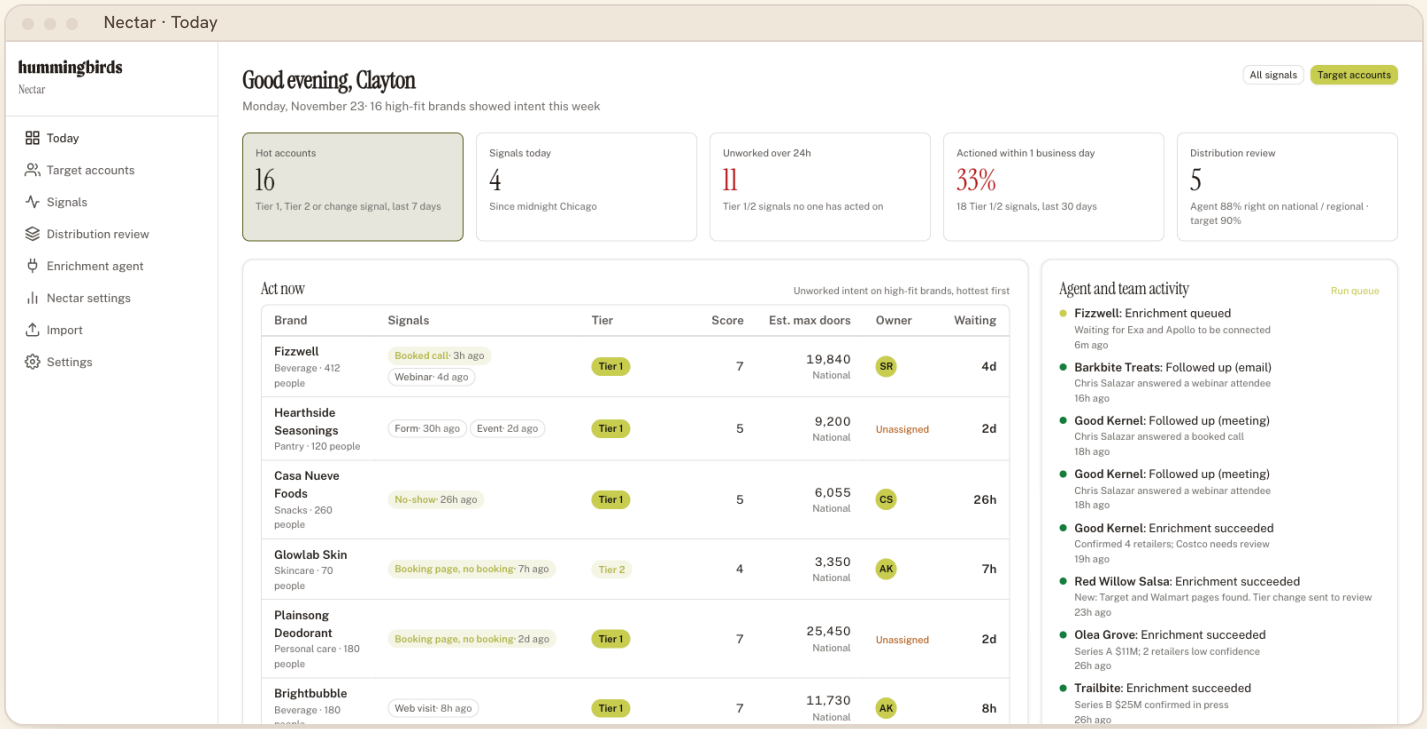
FIRST CODE TO FULL SYNC
3 days

16,151
ABM accounts kept in sync with HubSpot every 15 minutes
of about 52,600 companies

65%
of signals on hot accounts actioned within one business day
first baseline · 68 signals, 30 days

636
booked calls and form fills, each tied to a target account
420 booked calls · 216 form fills

<30 min
to catch up 12 days of HubSpot changes in one pass
8,024 companies · 7,162 activities



Today. The morning view: hot accounts, signals today, what is unworked after 24 hours, and the "Act now" list ranked by heat. All screens in this case study use sample data: brands, people and figures are fictional.

THE PROBLEM

The signals were in HubSpot. Nobody acted on them.

Hummingbirds helps CPG brands drive trial at retail with local creators. Its best prospects are brands with national distribution. HubSpot already recorded the moments that matter: a booked call, a no-show, a webinar sign-up, a demo form, a visit to the book-a-call page that ends without a booking.

Those signals were scattered across HubSpot and event tools. No one saw them in time, and no one could tell whether a rep had followed up. Each account also needed a manual scrub before outreach, because the key fact, which retailers carry the brand, came from a Clay workflow that was often wrong.

THE APPROACH

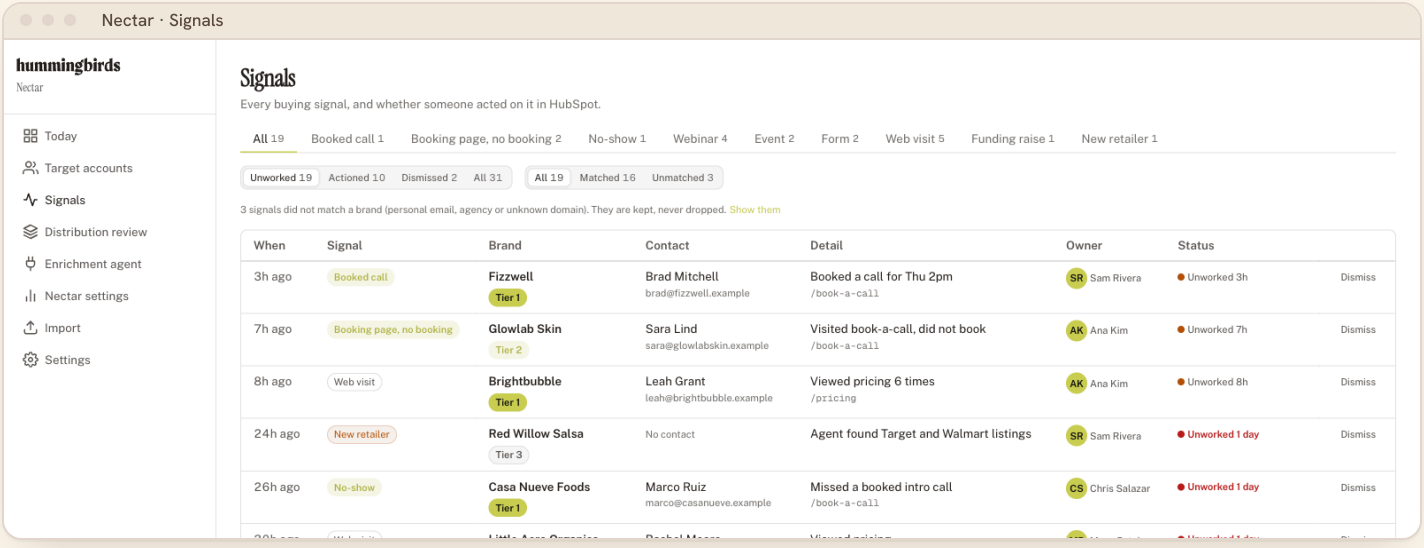
One job, scoped hard.

The full vision had seven screens, an AI agent and a Slack bot. We cut the first release to one job: **signal in, trusted profile out, rep acts the same day.** The scope set out what ships and what waits, 15 risks with an owner for each, and seven decisions for Hummingbirds to make. Three rules shaped the build:

- **Mirror the client's logic, never invent it.** Tiers follow Hummingbirds' own HubSpot ABM workflow rule by rule, and each account shows every rule with a pass or fail.
- **HubSpot stays the source of truth.** Nectar only reads. Every call goes through a guard that refuses anything but a read.
- **"Actioned" is earned, not clicked.** A signal counts as worked only when HubSpot shows a rep's email, call, meeting, note or task after it.

Before building the distribution agent, we reviewed the Clay workflow it replaces. The prompt itself had four defects, among them a Walgreens search never limited to Walgreens' own site, and an output field whose name did not match its schema.

> I'd like to use Hubspot as our 100% source of truth so making sure all the properties have time stamps and accuracy is what I believe will make this a very solid dash!
>
> Emily Steele, Hummingbirds, in her feedback on the first spec



Signals. Every buying signal, with the contact behind it, the owner and how long it has waited.

WHAT REPS GET

How a signal becomes an action

01

A signal arrives

The HubSpot sync picks up booked calls, no-shows and form fills every 15 minutes. A signed webhook takes book-a-call drop-offs, webinars and events.

02

It finds its account

By the contact's HubSpot company, then by email domain. Personal email addresses never match a brand.

03

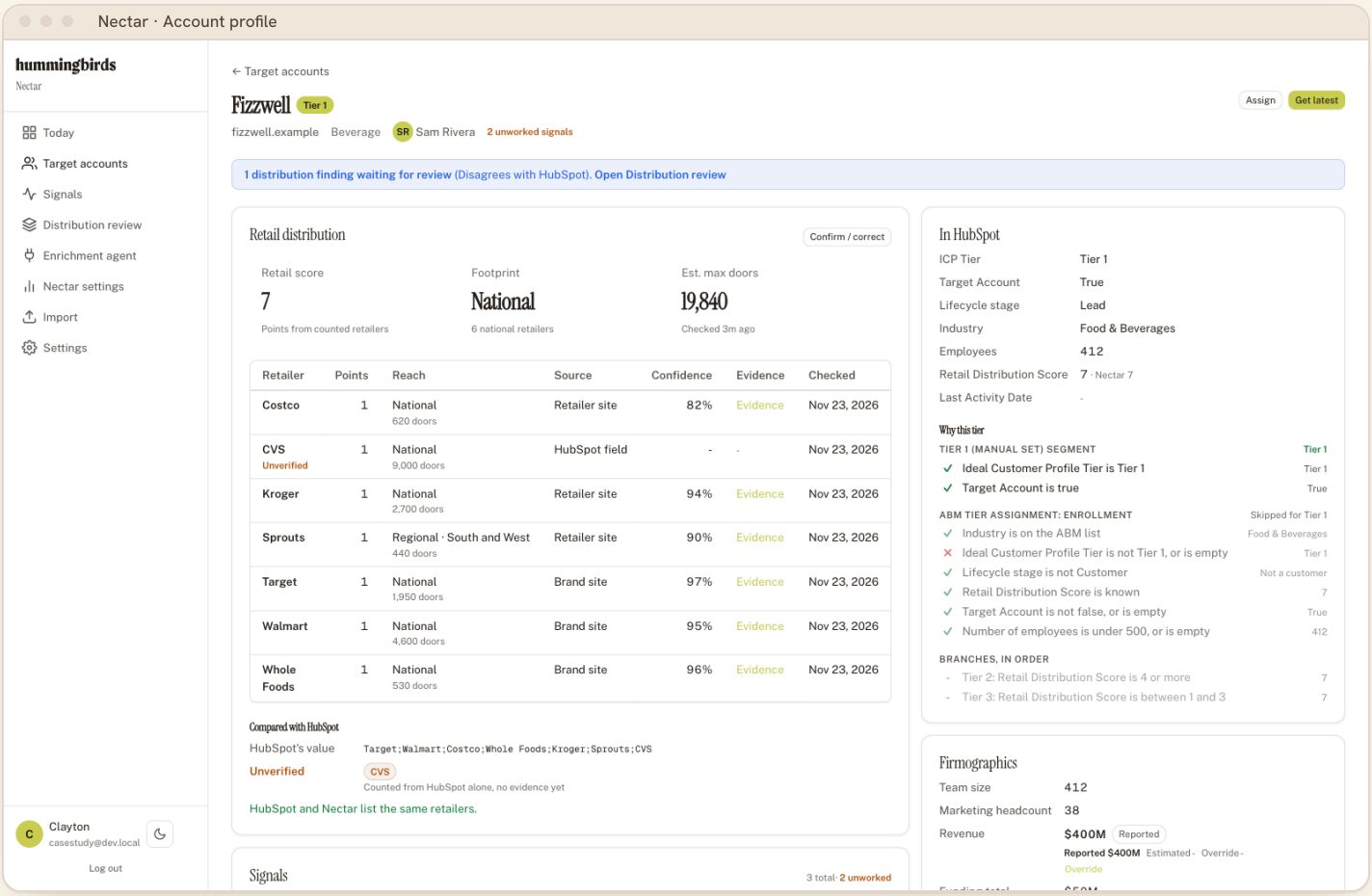
The account is ranked

Heat combines tier, signal strength and recency. The hottest unworked accounts lead "Act now".

04

The rep acts in HubSpot

Nectar sees the follow-up and marks the signal actioned, with who and how fast. A scheduled email counts only once it goes out.

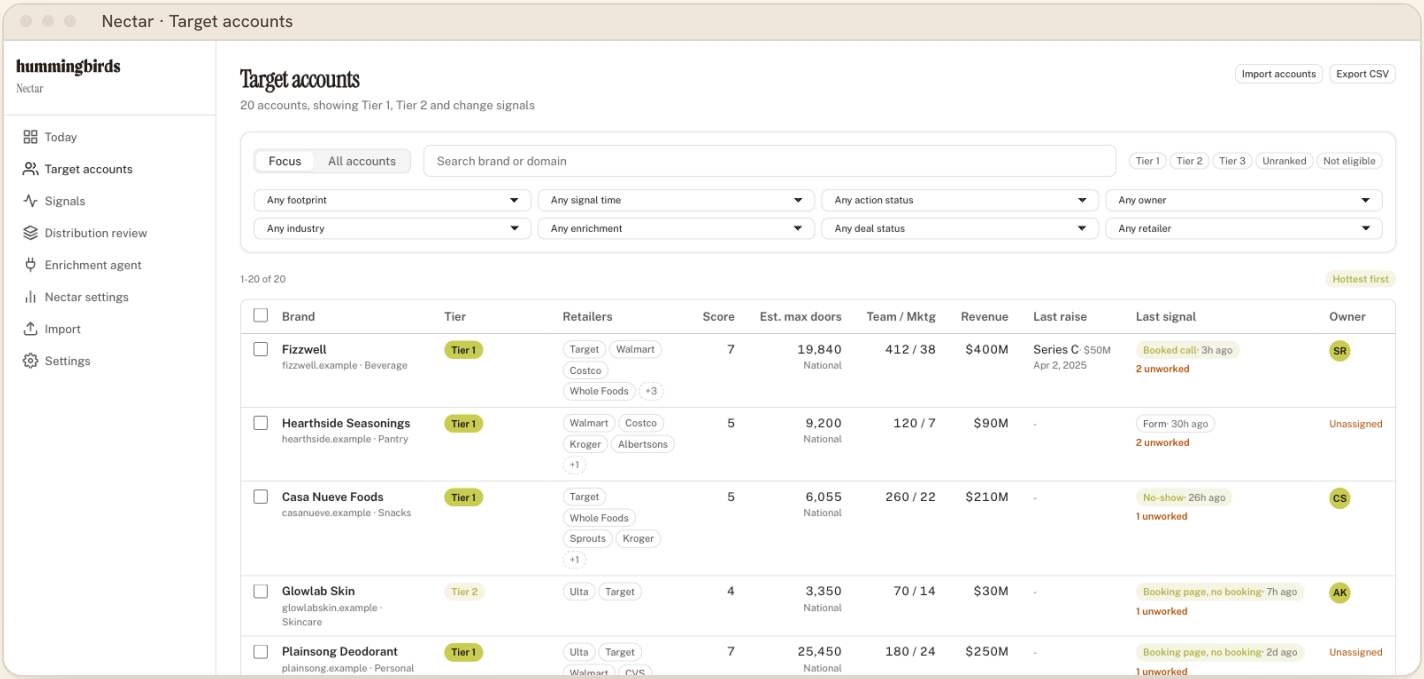


Account profile. Retail distribution with evidence and confidence for each retailer, HubSpot's own value side by side, and "Why this tier": each rule of the HubSpot ABM workflow with its value and a pass or fail.

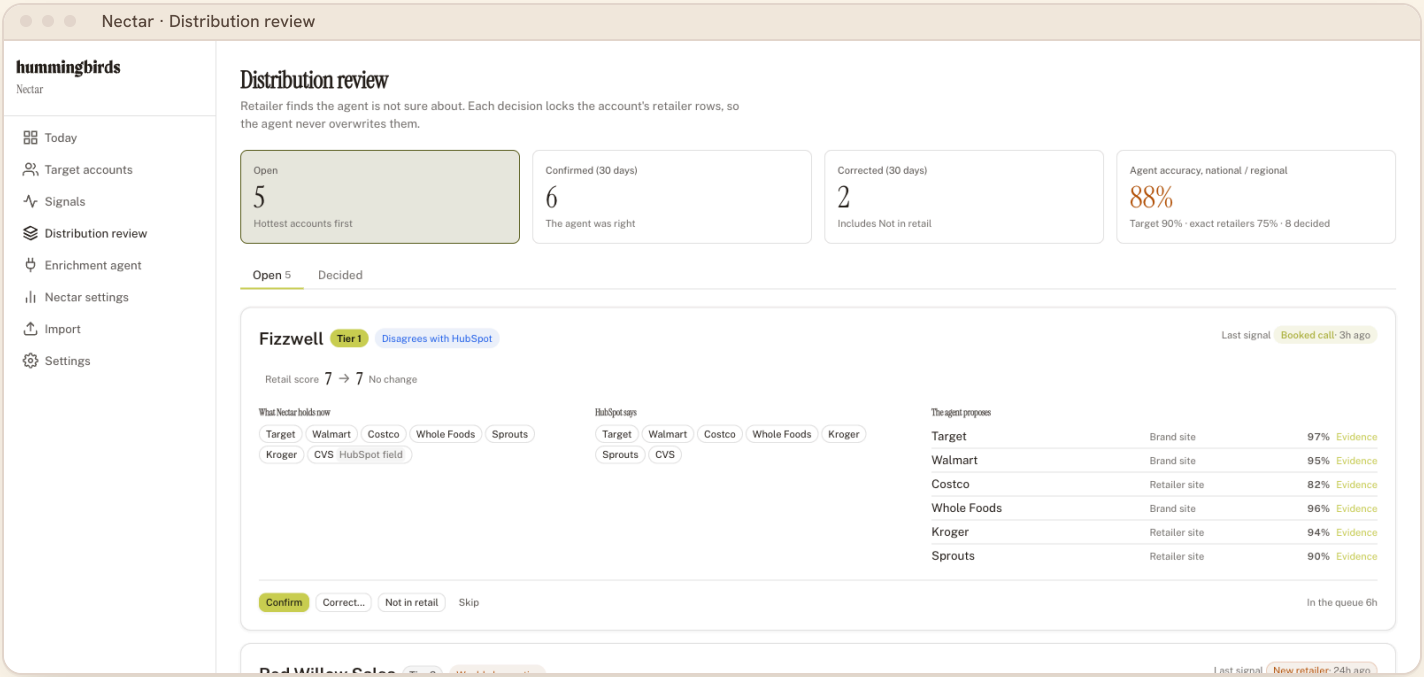
The retailer evidence shown here previews the enrichment agent, which is the next phase. The tier rules, the HubSpot fields and the comparison run on live data today.

INSIDE NECTAR

A list reps can trust, and a queue that checks the agent



Target accounts. Tier, retailers, retail score, estimated maximum doors, team and revenue, last raise and last signal, filterable by footprint, owner, signal age and HubSpot deal status.



Distribution review. The findings the agent is least sure of, hottest accounts first. A rep confirms, corrects or marks "Not in retail" in about 30 seconds; the decision locks, and every decision scores the agent against a 90% accuracy target.

WHAT WAS HARD

Real data broke our assumptions, so we checked each one

Demos run on clean data. Production runs on a HubSpot portal with 52,000 companies and years of history. We tested every assumption against the live portal and fixed what it showed.

FOUND

HubSpot refuses several endpoints for the kind of token the integration holds, including the batch reads that link deals and activity to companies. The first full sync stalled at deals.

FIXED

We probed every way of reading those links, one call each, and rebuilt the sync on the list endpoint that returns them inline. It needs half the calls of the original design.

FOUND

The platform allowed 120 HubSpot calls an hour, and a first pass over 16,000 companies needs far more.

FIXED

The sync saves its place after every page, pauses when the allowance runs out and resumes where it stopped. Chipp then raised the allowance to 1,000 an hour.

FOUND

HubSpot records every meetings-link booking as a form fill too. On the first read, 395 of 611 "form fills" were bookings Nectar already counted.

FIXED

Those are skipped now, and the copies were removed. The same live checks caught duplicate contacts, and an email scheduled a month ahead that counted as a follow-up.

FOUND

HubSpot keeps deal stage names on pipelines, which the token cannot read, so deals showed stage ids.

FIXED

The names come from the "Date entered" property HubSpot keeps for each stage. Reps see "Meeting Booked (Active Sales Pipeline)", not "115469696".

TIMELINE

From scope to live data in two weeks

Oct 8
MVP scope and risk register sent for review

Oct 15
Client feedback, with a video walkthrough of the HubSpot logic

Oct 19
First code: every screen on realistic sample data

Oct 20
HubSpot connected; the Clay workflow reviewed in full

Oct 22
Full sync live, updated every 15 minutes

Nov 3
Form fills added; booked calls queue enrichment

WHAT IS NEXT

The signal half is live. Next, the profile half.

The first release proved the loop on real data: a signal comes in, finds its account and gets worked, and Nectar can show it. The next stage makes every profile something a rep can trust before the first email.

An enrichment agent with evidence

Retailers confirmed from brand store locators and retailer sites with Firecrawl; team, revenue and funding from Apollo. No evidence, no row.

A review queue that measures it

Reps confirm national, regional or not in retail in about 30 seconds. Every decision scores the agent against a 90% target.

Slack, where reps already work

An 08:00 digest of unworked hot accounts, and a direct message to the owner when their account books a call.

A measured pilot

30 days with a small group of SDRs, judged on same-day action, correction rate and match rate, before Phase 2 is committed.

WHAT IT IS BUILT ON

Chipp
The platform: app, database, background sync, and the hosted HubSpot connection. No HubSpot password or token lives in the app.

HubSpot
The source of truth, read every 15 minutes: companies, deals, calls, meetings, emails, notes, tasks and form fills.

Firecrawl and Apollo
Next: store locators, retailer pages and press; team, revenue and funding.

Slack
Next: the morning digest and owner alerts.

WORK WITH WALTER

We build the systems your business needs.

And help your team put them to work.

Custom software, AI agents and connected workflows, built in your own platform account. Hey Walter is a Certified Chipp Architect.

Start with a discovery call heywalter.dev/discovery