

package.md

00-start-here/choose-your-stack.md

PS> boring fix lead-followup
status: practical, transparent, no hype

Choose Your Setup Path

You do not need every tool in this package.

Pick the path that matches how your business already works. The system should reduce operational drag, not give you a new hobby.

Quick recommendation

If you currently use...	Start with...
Nothing / email / spreadsheets	Simple path
Airtable or visual databases	Airtable path
HubSpot or you want a CRM	HubSpot path
Custom website/app or technical team	Supabase / n8n path
ChatGPT, Claude, or Gemini for work	LLM assistant path, after choosing a core path

Path 1 – Simple path

terminal

Tally or Google Forms
Google Sheets
Gmail
Zapier
Google Calendar

Best for the fastest practical setup. This is the version to use if you want to prove the workflow before investing in a CRM or custom backend.

Choose this path if

- you are starting from messy inboxes or spreadsheets
- you want the lowest learning curve
- you want a system today, not a software migration
- you are okay with a lightweight pipeline

Do not choose this path if

- you already have a CRM your team uses daily
- you need multi-user permissions and reporting
- you need custom app logic

Path 2 – Airtable path

terminal

Fillout or Tally
Airtable
Zapier or Make
Gmail / Outlook

Best for a lightweight CRM-style pipeline. Airtable is a good middle ground between spreadsheets and full CRM software.

Choose this path if

- you like visual tables, views, and dashboards
- you want more structure than Sheets
- you do not want HubSpot yet
- you want a flexible operations database

Path 3 – HubSpot path

terminal

HubSpot Forms
HubSpot CRM
HubSpot Tasks
Email templates

Best for businesses that already use or want a real CRM. HubSpot is the cleanest path when follow-up belongs inside a sales pipeline.

Choose this path if

- leads should become contacts/deals
- you want tasks, stages, and sales activity in one place
- you may eventually need reporting or a sales team
- you want fewer glue tools

Path 4 – Technical path

terminal

Custom form or Webflow form
Supabase
n8n or Pipedream
Resend / Postmark / Twilio

Best for technical users, custom CRMs, or businesses building proprietary systems.

Choose this path if

- you have a custom site/app
- you want a real database and API
- you are comfortable with webhooks and SQL
- you want more ownership and flexibility

Path 5 – LLM assistant path

terminal

ChatGPT / Claude / Gemini
connected to Gmail, Drive, Calendar, HubSpot, Airtable, or Notion where available

Best for drafting, summarizing, searching, and preparing responses.

Important:

The LLM assistant is not the system of record.

Use AI to help with context and drafts. Use a database, CRM, or sheet to track the actual lead state.

> boring systems_

implementation package draft