Marketing Agency CRM Setup Checklist

How agencies organise leads, pipelines, and automation in one system.

Marketing Agency CRM Setup Checklist

Organise your lead tracking, pipelines, and automation in one system.

Most agencies lose leads because their systems are scattered across multiple tools.

Use this checklist to quickly review how your agency manages leads and follow ups.

AutomationClarityHub.com

Lead Capture Setup

Where do your leads come from?
Many agencies lose potential clients simply because leads arrive in multiple tools and are not tracked properly.

Tick the sources your agency currently uses.

- ☐ Website contact forms
- ☐ Landing pages
- ☐ Sales funnels
- ☐ Facebook / Google ads
- ☐ Appointment bookings
- ☐ Chat widgets
- ☐ Referrals
- ☐ Organic search

Quick check

Where are these leads currently stored?

- ☐ Email inbox
- ☐ Spreadsheet
- ☐ CRM platform
- ☐ Funnel builder
- ☐ Multiple systems

Pipeline Setup

Example pipeline stages

1 New Lead

 2 Contacted

 3 Discovery Call Booked

 4 Proposal Sent

 5 Closed Client

 6 Lost Lead

Quick check

Do you currently track leads using pipeline stages?

□ Yes

□ No

Tip

A clear pipeline helps agencies track which enquiries need follow-up and which campaigns are producing clients.

AutomationClarityHub.com

Automation + AI

Lead follow-up automation
☐ Instant email reply
☐ SMS confirmation message
☐ Call booking reminders
☐ Follow-up email after 24 hours
☐ Lead nurturing sequence

AI lead response (optional)
☐ AI chat answering enquiries
☐ AI responding to common questions
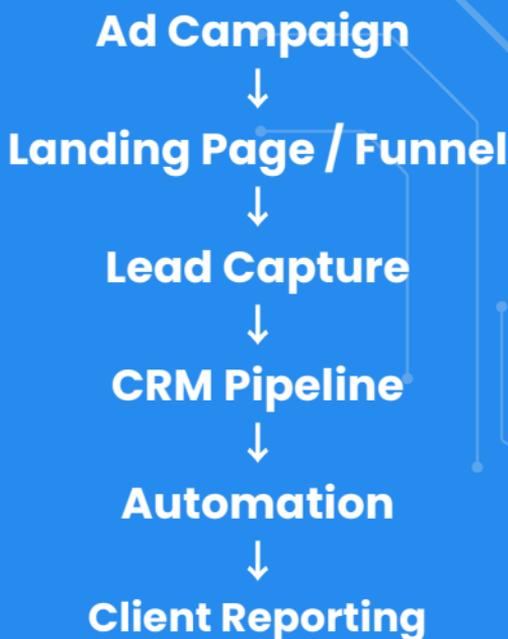☐ AI qualifying leads before calls

Quick check
Do your leads receive a reply within 5 minutes?
☐ Yes
☐ No

AutomationClarityHub.com

System Overview

Ad Campaign

↓

Landing Page / Funnel

↓

Lead Capture

↓

CRM Pipeline

↓

Automation

↓

Client Reporting

If you discovered gaps in your system while completing this checklist, it usually means your leads, automation, and reporting are spread across multiple tools.

Many agencies solve this by moving lead tracking, pipelines, and automation into one platform.

Return to the guide where you downloaded this checklist.

AutomationClarityHub.com