

**JACK WILSON**

MARKETING RESOURCE

# CRM & Automation Starter Blueprint

The minimum viable CRM setup that stops leads falling through gaps.

You do not need a complex CRM build to see results. You need clean data capture, fast follow-up and a handful of automations that run whether anyone remembers or not. Start here.

---

Prepared by Jack Wilson — Digital Marketing Strategist

[marketing@jackwilsonconsulting.co.uk](mailto:marketing@jackwilsonconsulting.co.uk)

[jackwilsonconsulting.co.uk](http://jackwilsonconsulting.co.uk)

---

## Step 1: Data capture

- Every form, call and chat writes into one CRM record
- Source, campaign and landing page captured automatically
- Required fields limited to what sales genuinely needs
- Duplicate handling rule agreed and tested

---

## Step 2: Pipeline design

- Stages reflect the buyer's decision, not internal admin
- Entry and exit criteria written for every stage
- One owner per record at all times
- Stale-deal rule: what happens after 14 days of silence

---

## Step 3: The five automations worth building first

- Instant acknowledgement email setting response expectations
- Internal alert to the owner within 60 seconds of enquiry
- Three-step nurture for leads that do not respond
- Quote or proposal follow-up sequence
- Reactivation campaign for lapsed enquiries at 90 days

---

## Step 4: Reporting hooks

- Lead source reported all the way to closed revenue
- Speed-to-lead tracked as a live metric
- Lost reasons captured as structured data, not free text
- Monthly data hygiene check owned by a named person

---

## Step 5: Adoption

- One page of process documentation per pipeline
- Training recorded, not just delivered live
- Reporting built from CRM data so accuracy matters to everyone
- Review the setup quarterly and delete what nobody uses