CRM + Email Automation Setup Checklist

For lead-driven businesses building reliable capture, nurture, and handoff systems.

Foundation

- [ ] Define lifecycle stages (new, nurtured, MQL, SQL, customer).
- [ ] Document lead source and campaign tracking standards.
- [ ] Assign a single CRM owner for data governance.
- [ ] Set minimum required fields for lead creation.

Capture + First Response

- [ ] Ensure all forms create a CRM record with default stage.
- [ ] Automate a confirmation email within minutes.
- [ ] Set response SLAs for high-intent sources.
- [ ] Implement progressive profiling after first value exchange.

Scoring + Routing

- [ ] Use a simple fit + intent scoring model.
- [ ] Define MQL/SQL thresholds with sales input.
- [ ] Route qualified leads to owners with context.
- [ ] Create a recycle path for non-ready leads.

Nurture Sequences

- [ ] Segment sequences by intent and timeline.
- [ ] Limit sequences to 3–6 emails each.
- [ ] Add a decision point and clear exit condition.
- [ ] Suppress automation for active sales conversations.

Handoff + Pipeline Hygiene

- [ ] Attach lead score, last touch, and next step to tasks.
- [ ] Define follow-up task templates for sales.
- [ ] Auto-close or recycle stale opportunities.

Measurement + Governance

- [ ] Track stage conversion and lead aging metrics.
- [ ] Review source-level velocity monthly.
- [ ] Audit triggers and exit conditions quarterly.

Tip: print this page to PDF for sharing with sales and marketing stakeholders.