Marketing and Sales Automation Launch Blueprint

Objective

Give marketing and sales teams a clear ninety day plan to move from scattered tools to a working marketing and sales automation platform.

Who this is for

- Marketing managers and revenue leaders
- Sales leaders and founders
- Operations or CRM owners who support both teams

Phase one Discover and define week one to two

Goal: Agree why you are doing this and understand your current reality.

Key actions:

- List five concrete outcomes you want from automation, such as faster lead response, less manual work and clearer reporting.
- Map how leads move today, including sources, systems where data lives and who follows up at each step.
- Highlight obvious gaps such as lost leads, duplicated data or slow response.

Outputs:

- One page outcomes list with five clear results.
- One simple flow diagram or table of the current lead journey.

Phase two Design and shortlist week three to four

Goal: Turn your real process into journeys and choose which platforms to test.

Key actions:

- Choose one or two journeys to automate first, such as new website leads, demo requests or re engagement of cold leads.
- Sketch each journey with trigger, messages, timing and when sales should act.
- From research and referrals, select three to five platforms that integrate with your tools and fit your budget.

Outputs:

- One page journey sketches for your first automation flows.
- Shortlist of platforms with links, pricing pages and contact people.

Phase three Pilot and evaluate week five to eight

Goal: Test each shortlisted platform with real data and real leads.

Key actions:

- For each platform, implement one real journey for a single campaign or segment.
- Run the pilot for the same period and track response time, meetings booked and team effort.
- Collect feedback from marketing, sales and leadership on ease of use, clarity of data and confidence in daily usage.

Outputs:

- Measured impact on response time, meetings created and manual effort.
- Comparison of platforms based on real usage, not only feature lists.

Phase four Launch and improve week nine to twelve

Goal: Go live with your first journeys and create a simple operating rhythm.

Key actions:

- Finalise and launch your first one or two journeys in production.
- Train everyone who will use the system every day and document simple how to steps.
- Define weekly metrics such as new leads by source, time to first response and meetings created from automated journeys.
- Hold a short weekly review to adjust messages, timings and handoffs where needed.

Outputs:

- Working automation that handles a real part of your funnel.
- A weekly review and improvement habit owned by named people.

Core roles and ownership

- Automation or CRM owner maintains journeys and data quality and coordinates changes.
- Marketing lead owns campaigns, content and segment definitions.
- Sales lead owns follow up rules, pipeline stages and adoption in the sales team.
- Executive sponsor clears blockers and reviews progress monthly with a simple scorecard.

Success snapshot after ninety days

- You can clearly describe how new leads are captured and handled.
- You know typical time to first response and have reduced delays.
- You can see which campaigns and journeys contribute to pipeline and revenue.
- You have a clear list of next journeys or channels to add.