SERVICE TIMELINE **SALES DATA & CRM**

A STEP-BY-STEP **BREAKDOWN** FROM **PLANNING** TO DELIVERY

Task	Process	Timeline	Comment
Lead/Contact Management	01 Identify new lead/contact 02 Create record in CRM 03 Add key details (name, company, role, contact info) 04 Log recent interaction or source 05 Assign to appropriate owner if needed	2 DAYS	
Company/Account Management	01 Identify associated compan 02 Create or update company record in CRM 03 Link contacts to the company 04 Update company details (industry, size, location) 05 Add relevant notes or tags	2 DAYS	
Deal/Opportunity Management	01 Create deal/opportunity record 02 Link to related contact and company 03 Define deal value and expected close date 04 Set sales stage 05 Update deal status as it progresses	2 DAYS	

Task	Process	Timeline	Comment
Task & Activity Logging	01 Open contact or deal record 02 Log activity (call, email, meeting note) 03 Set due date or outcome if needed 04 Assign task to self or team member	2 DAYS	
Meeting Scheduling	01 Share meeting/calendar link 02 Confirm meeting via scheduling tools 03 Log meeting in CRM 04 Add notes and outcomes after the call	1 DAY	
Email Campaigns	01 Segment contacts by campaign criteria 02 Create or select email template 03 Set send date and time 04 Test the campaign 05 Schedule or send email 06 Monitor performance (opens, clicks)	2-3 DAYS	
Lead Scoring	01 Define the lead scoring model (demographics + engagement) 02 Apply scoring rules in the CRM 03 Review scoring results weekly 04 Adjust the model based on outcomes and feedback	2 DAYS	

Task	Process	Timeline	Comment
Marketing Automation	01 Define trigger events and campaign goals 02 Create content or email sequences 03 Set timing and delays for automation 04 Test the automation flow 05 Activate and monitor performance	3-5 DAYS	
Form & Landing Page Creation	01 Design the form (fields, layout) 02 Embed it on a landing page 03 Connect to CRM lists or workflows 04 Test functionality and submission flow 05 Publish and go live	2-3 DAYS	
Reports & Dashboards	01 Define reporting goals and KPIs 02 Build custom reports or use templates 03 Add reports to a dashboard view 04 Share dashboard with stakeholders 05 Schedule recurring report delivery	5-7 DAYS	

Task	Process	Timeline	Comment
Workflow Automation	01 Identify manual steps in a process 02 Create automation logic or rules in CRM 03 Configure triggers, actions, and conditions 04 Test the workflow thoroughly 05 Deploy and monitor perfor-mance	5-7 DAYS	
Integration Support	01 Identify tools to integrate 02 Choose integration method (native, app, API) 03 Authenticate and configure access 04 Test data flow and functionality 05 Monitor sync and troubleshoot issues	5-7 DAYS	
Email Logging & Tracking	01 Enable email logging in CRM or email tool 02 Sync emails to contact records 03 Activate tracking for opens, clicks, replies 04 Review engagement metrics regularly 05 Adjust communication strategy based on data	2-3 DAYS	