

# The Top 20 CRM Automations in the World

AUDIOBOOK COMPANION

This is the companion to the audiobook edition. The audiobook walks through twenty automations and the problems they solve; these tables let you see the full map at a glance, find the automation that matches a problem you're facing, and keep your place as you move through the chapters.

Use the first table when you have a problem and want to know which automations to reach for. Use the second when you want a one-line summary of what each automation does and the benefit it delivers.

## Cheat Sheet: Problem to Automation

Start with the problem on the left. The numbers point to the automations that solve it, in priority order.

High Marketing Spend, Low Conversion	1, 2, 3, 18	4, 16	Stop losing deals in the first 5 minutes; know which campaigns actually work
Leads Disappear After Inquiry	1, 4	2, 3	Instant response; enforced follow-up; no deals die in silence
Can't Tell Which Marketing Works	18, 2	20	Real attribution from click to revenue; kill losing campaigns
Sales Complains About Lead Quality	3, 2	1, 18	VIPs routed to best reps; noise filtered automatically
Many Leads, Few Conversions	3, 4, 5	1, 2	Score and prioritize; enforce follow-up; nurture long-term
Pipeline Full of Fantasy Deals	7, 6	4, 14	Remove stalled deals; stage-based playbooks enforce reality
Forecasts Always Wrong	6, 7	14, 20	Consistent process; honest pipeline; visible truth
Every Salesperson Works Differently	6, 15	14	Stage-based playbooks; guided adoption; measurable behavior
Deals Marked "Closed Won" But No Invoice	9, 8	17	Billing schedules auto-created; delivery triggered; money flows
Revenue in CRM ≠ Revenue in Accounting	9	8, 20	Single source of truth; invoices match deals; no manual gaps
Subscriptions Never Start or Stop Wrong	9, 10	12	Auto-created from deals; renewals structured; churn visible early
Project Delivery Chaos After Sale	8	17, 19	Scope-driven tasks; templates; vendor assignment automated
Customers Quietly Leaving	10, 12, 13	11	Health signals; onboarding structured; VIPs protected
Renewals Feel Like Negotiations	10, 12	13	Strong Day 1; support visible; relationship not rescue
Selling to Angry Customers by Accident	12	13, 20	Support signals in CRM; SLA breaches visible; timing protected
Don't Know Who Your Best Customers Are	13	10, 12, 20	RFM segments; VIP treatment automatic; attention allocated correctly
Small Customers Get Same Attention as VIPs	13	12	Value-based routing; SLA tiers; strategic focus protected
Team Not Using CRM	14, 15, 16	4, 6	Company channels enforced; guided playbooks; adoption tracked
Activity on Personal Phones, Not CRM	14	15, 4	Communication visible; Smart Account Management; coaching with facts
Can't Trust Your Own Reports	16, 20	2, 18	Data validated at entry; duplicates merged; executive dashboard unified
Duplicate Records Everywhere	16	2	Entry validation; AI duplicate detection; automatic merging
Contracts Lost in Email	17	8, 9	Document workspaces; e-signature tracking; version control
Sensitive Documents Floating Around	17	16	Secure portals; structured collection; audit trail
Proposals Take Forever to Create	17	6, 8	CRM-generated; templates; scope-driven automation
Marketing and Sales Blame Each Other	18	2, 3, 4	Attribution clear; outcomes enforced; feedback loop closed
Ad Spend on Wrong Geography / Audience	18, 2	3	UTM tracking; callbacks to platforms; real-time visibility
Vendor / Freelancer Chaos After Sale	19	8, 17	Structured pool; compliance enforced; assignments tracked
Last-Minute Scramble for Subcontractors	19	8	Resourcing triggered at Closed Won; portals; PO automation
Owner Doesn't Know What's Really Happening	20	9, 12, 13, 18	Executive cockpit; unified dashboards; AI exceptions daily
Ten Systems, Ten Different Stories	20	9, 18	CRM + Finance + Support connected; definitions agreed; one truth

## Automation Quick Summary Reference

One line per automation: the problem it solves and the benefit it delivers.

1	Speed-to-Lead	Leads die in first 5 minutes	Instant AI response; conversion jumps 20x
2	Lead Capture & Enrichment	Blind on who prospects are; can't track campaigns	Real attribution; enriched profiles; email validation
3	Lead Scoring	All leads treated equally; best reps waste time	VIPs routed correctly; noise filtered automatically
4	First Follow-Up	Tasks ignored; deals die in silence	Enforced follow-up; visible activity; no ghosting
5	Nurture "Not Ready Yet"	Lost leads forgotten forever	Value-based journeys; trust built over time
6	Stage-Based Playbooks	Every salesperson invents own process	Guided steps; consistent behavior; excellence enforced
7	Stalled Deal Recovery	Fake pipeline; 72% fantasy	Truth exposed; stalls routed by value; forecast honest
8	Closed Won → Project	"We sold it, now what?"	Scope-driven tasks; templates; delivery starts correctly
9	Closed Won → Money	Deals closed but not invoiced	Billing auto-created; subscriptions structured; cash flows
10	Renewals & Next Deal	Renewals feel desperate; churn high	Strong onboarding; health monitored; expansion natural
11	Close/Lost Winback	Lost deals = garbage	Relationships nurtured; trust built; timing respected
12	Account Health & Support	Selling to angry customers by accident	Support signals visible; SLA breaches flagged; timing protected
13	RFM Segmentation	Everyone treated the same	VIPs identified; attention allocated; value protected
14	Sales Performance & SLA	Activity on personal phones; can't coach	Company channels; Smart Account Management; AI coaching
15	Implementation Playbooks	Team won't use CRM	Guided adoption; onboarding structured; tracking visible
16	Data Hygiene	Garbage data; can't trust reports	Entry validated; duplicates merged; cleanup ongoing
17	Documents & Contracts	Chaos in email; "Which version?"	Workspaces; e-signature; secure portals; version control
18	Marketing Sales Alignment	"Your fault" vs "My fault"; blind spending	Attribution real; outcomes enforced; spend connected to revenue
19	Vendor/Freelancer Management	Last-minute vendor panic	Structured pool; compliance enforced; POs automated
20	Executive Cockpit	Ten systems, ten stories	Unified dashboard; AI exceptions; one truth visible