

THE ACQUISITION CRM (NOTION SETUP)

1. Create a New Database

Name it:

“Client Acquisition Pipeline”

Use a **Table view**.

2. CORE PROPERTIES (Don't Skip These)

Basic Info

- **Name** (Title) → Company or Person
- **Contact Person** (Text)
- **Platform** (Select)
 - LinkedIn
 - Instagram
 - Email
 - Twitter (X)

Qualification Layer

- **Status** (Select)
 - Lead Found
 - Researched
 - Contacted
 - Replied
 - Qualified
 - Proposal Sent

- Closed
 - Lost
- **Quality Score** (Number: 1–5)
(How “high-end” they are)
- **Fit Type** (Select)
 - Branding Gap
 - Conversion Gap
 - Growth Opportunity

Outreach Tracking

- **Last Contact Date** (Date)
- **Next Follow-Up Date** (Date)
- **Response Status** (Select)
 - No Response
 - Interested
 - Not Now
 - Not Interested

Deal Intelligence

- **Potential Value (₹)** (Number)
- **Urgency Level** (Select)
 - Low
 - Medium
 - High

Notes (Important)

- **Insight / Observation** (Text)
(This is where your “pitch angle” lives)
- **Conversation Notes** (Text)

3. AUTOMATIONS (THE REAL POWER)

A. Follow-Up Priority Formula

Create a **Formula property** called:

“Follow-Up Priority”

```
if(  
  prop("Next Follow-Up Date") <= now(),  
  "🔥 Follow Up Now",  
  "__"  
)
```

👉 This tells you **who needs attention today**

B. Pipeline Value Calculator

Create a **Formula property**:

“Weighted Value”

```
prop("Potential Value (₦)") * prop("Quality Score")
```

👉 Helps you focus on **high-value + high-quality leads**

4. VIEWS (THIS IS WHERE IT BECOMES USEFUL)

View 1 — “Today’s Follow-Ups”

- Filter:
 - Next Follow-Up Date → is on or before today

- Sort:
 - Urgency Level → High to Low

👉 This becomes your **daily action list**

View 2 — “Active Conversations”

- Filter:
 - Status → is Replied OR Qualified

👉 These are your **hot leads**

View 3 — “Pipeline Board” (Kanban)

Group by:

- Status

👉 Drag leads across stages:

Lead Found → Contacted → Replied → Closed

View 4 — “High-Value Leads”

- Filter:
 - Quality Score ≥ 4

👉 Only focus on serious clients

🌿 5. THE WORKFLOW (HOW TO USE IT DAILY)

Step 1 — Add Lead

When you find someone on **LinkedIn** or **Instagram**:

- Add them immediately

- Fill:
 - Quality Score
 - Fit Type
 - Insight

Step 2 — Send Outreach

- Update:
 - Status → Contacted
 - Last Contact Date → Today
 - Next Follow-Up → +3 days

Step 3 — Follow-Up System

- When you follow up:
 - Update Last Contact Date
 - Push Next Follow-Up again

Step 4 — When They Reply

- Status → Replied
- Fill Conversation Notes
- Adjust Potential Value

Step 5 — Close or Lose

- Move to:
 - Closed 

- Lost ❌

🎯 6. SIMPLE RULES (THIS MAKES IT WORK)

- Never leave **Next Follow-Up Date empty**
- Never send outreach without filling **Insight**
- Always update after every interaction
- Work from **“Today’s Follow-Ups” view ONLY**

⚠️ REALITY CHECK

Most people build CRMs and abandon them in 3 days.

Why?

Because they:

- Overcomplicate it
- Don't tie it to action
- Don't track follow-ups

This one avoids that.

💡 OPTIONAL UPGRADE (If You Want More Power)

I can extend this into:

- A **full Notion dashboard** (with metrics like conversion rate)
- A **proposal tracker**
- A **revenue forecasting system**
- Or integrate your outreach scripts directly inside each lead page

If you want, I can also **generate a Notion template link structure** you can copy directly (with pre-filled fields and dummy data so you don't start from scratch).