

# Marketing Automation Worksheet

This abbreviated worksheet will help you to clarify your process and start streamlining your data collection across it to properly prepare your for marketing and sales automation.

When filling in the blanks try to be as concise and descriptive as possible.

## Capture (Lead Generation)

I capture leads to my business by

*(Define your primary traffic source and your LeadMagnet)*

When they arrive I capture the following information

*(List all of the information you capture on your landing page)*

**Landing Page Technology:**

Additional Notes:

## Communicate (Follow Up)

To ensure I follow up with every lead that comes into my business I do the following

*(Define the type of messaging you send to new leads and your call-to-action)*

As I'm following up with them, I will capture the following information in addition to make the sale process easier

*(List any additional information you capture through your follow up process)*

**Messaging Technology:**

Additional Notes:

## Close (Create Customers)

When they're ready I will close the deal by

*(Define how you will make your offer and process payment)*

When they become a customer, I will capture the following information

*(List any additional information you capture as you process the payment)*

**Payment Processing Technology:**

Additional Notes: