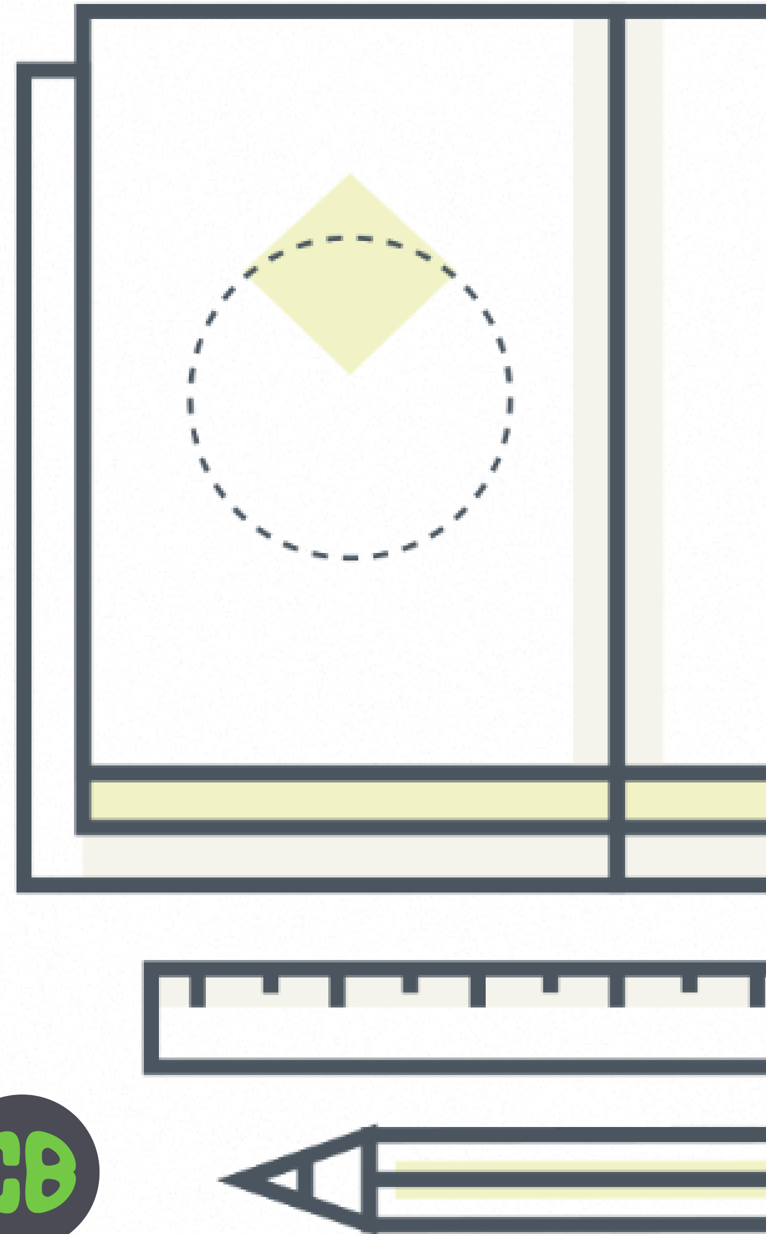
Quarterly

CRM

Strategy Playbook

A simple planning tool to help leadership turn CRM evidence into better content, campaign, sales, and follow-up priorities.

Your CRM is where your target market tells the truth.



Best used before: Quarterly planning meetings, Campaign planning sessions, Sales and marketing alignment meetings, Content strategy reviews, and Pipeline health discussions.

Planning Without CRM Evidence Creates Expensive Assumptions

Start Here Before the Planning Conversation Gets Too Big

They have a strategy problem because the ideas are not always connected to what buyers are actually doing.

A CRM can show:

- Which lead sources produced real opportunities
- Which deals moved quickly
- Which deals stalled
- Which objections appeared repeatedly
- Which content influenced action
- Which segments showed intent
- Where follow-up broke down
- What buyers asked before they were ready to decide

That evidence should shape the next quarter before priorities are finalized.

A quarterly plan without CRM insight is just a well-formatted guess.

The 15-Minute CRM Evidence Review

Start Here Before the Planning Conversation Gets Too Big.

This does not need to become a giant reporting exercise. Before the team discusses new campaigns, offers, content themes, sales priorities, or nurture improvements, review five CRM patterns.

The five patterns

1. Best lead source: Where did the strongest opportunities actually come from?
2. Top lost reason: What objection, issue, or concern kept showing up?
3. Most common stall stage: Where did deals slow down, lose urgency, or disappear?
4. Highest-intent behavior: What actions showed real buying interest?
5. Biggest follow-up gap: Where did the team wait too long, lose context, or miss the next step?

Start Here Before the Planning Conversation Gets Too Big

Best lead source: ____

Top lost reason: ____

Most common stall stage: ____

Highest-intent behavior: ____

Biggest follow-up gap: ____

What Moved?

Look at Where Momentum Actually Happened

Start by identifying where deals, leads, and opportunities gained traction.

The goal is not to celebrate activity. The goal is to understand what created real movement.

Review

- Closed-won deals
- Closed-lost deals
- Stalled opportunities
- Deal velocity
- Highest-converting lead sources
- Campaign-influenced opportunities
- Repeat website visits or high-intent engagement

Worksheet - CRM Evidence | What We Noticed | What It Might Mean | Possible Action

CRM Evidence	What We Noticed	What It Might Mean	Action
Closed-won patterns			
Fast-moving deals			
Strongest lead sources			
Campaign-influenced opportunities			
High-intent behaviors			

What should we do more of next quarter based on where momentum already exists?

Answer ______________________________

What Caused Friction?

Find the Places Buyers Slowed Down, Pushed Back, or Disappeared

Friction is useful when you pay attention to it.

Lost deals, stalled opportunities, repeated objections, and delayed follow-ups can point directly to better content, stronger sales enablement, clearer positioning, and better nurture logic.

Review

- Common objections
- Lost-deal reasons
- Ghosted stages
- Delayed follow-ups
- Repeated buyer questions
- Pricing concerns
- Confusing service or offer explanations
- Gaps between marketing promise and sales conversation

Worksheet - Friction Point | Where It Showed Up | Why It Matters | What Should Change

Friction Point	Where It Showed Up	Why It Matters	What Should Change
Repeated objection			
Lost-deal reason			
Stall stage			
Follow-up gap			
Buyer question			

What is one source of friction we should address before it costs us more opportunities?

Answer ______________________________

What Created Intent?

Separate Casual Activity From Real Buying Signals

Not every click means someone is ready to buy.

But patterns of behavior can show when people are paying attention, comparing options, revisiting a problem, or moving closer to a decision.

Look for the actions that suggest meaningful intent.

Review

- Email clicks
- Email replies
- Form fills
- Repeat visits
- Meeting bookings
- Pricing page visits
- Service page visits
- Resource downloads
- Webinar or event engagement
- Contacts returning after a period of inactivity

Worksheet - Intent Signal | Who Took This Action? | What Stage Are They In? | Recommended Next Step

Intent Signal	Who Took This Action	What Stage Are they In?	Next Step
Email click			
Form fill			
Repeat visit			
Meeting booking			
Resource engagement			

Which buyer behaviors should influence next quarter’s content, nurture, or sales follow-up?

Answer ______________________________

Turn CRM Evidence Into Quarterly Priorities

Do Not Stop at the Data

CRM evidence only matters if it changes what the team does next.

Use the patterns you found to shape practical priorities for the next quarter.

CRM evidence can become

- Content themes
- Sales talking points
- Follow-up improvements
- Nurture updates
- Campaign priorities
- Segmentation changes
- Offer positioning updates
- Buyer education resources
- Sales enablement tools
- Website or landing page improvements

Worksheet - CRM Insight | Strategic Priority | Owner | Next Step | Deadline

CRM Insight	Strategic Priority	Owner	Next Step	Deadline
Email click				
Form fill				
Repeat visit				
Meeting booking				
Resource engagement				

Example - CRM Insight: Pricing appeared in 7 of the last 12 closed-lost notes.
Strategic Priority: Create stronger pricing education before prospects reach the final sales conversation.
Next Step: Build a comparison guide and sales follow-up email that explains value before pricing stalls the deal.

CRM-Backed Priority Rate

Measure Whether Strategy Is Actually Connected to CRM Evidence

A strong quarterly plan should connect major priorities to buyer behavior, pipeline reality, sales friction, or customer questions.

Track your CRM-Backed Priority Rate to see how many planning decisions are grounded in real CRM insight.

Formula: Number of quarterly priorities tied to CRM evidence divided by total number of quarterly priorities equals CRM-Backed Priority Rate.

Example: 3 of 5 quarterly priorities came from CRM evidence equals 60% CRM-Backed Priority Rate.

Total number of quarterly priorities: ______________________________

Number tied to CRM evidence: ____________________________________

CRM-Backed Priority Rate: ____

Priority check - Quarterly Priority | CRM Insight Behind It | Evidence Source | Keep, Change, or Cut?

Quarterly Priority	CRM Insight Behind It	Evidence Source	Keep/Change/Cut

Which priorities are backed by evidence, and which ones are based mostly on assumptions?

Answer ____

What This Playbook Is Really Telling You

Your CRM Should Help Set the Strategy

Your CRM is where your market leaves evidence. It shows what buyers cared about, what they ignored, where they hesitated, what made them move, and where your internal process created friction.

Use that evidence before the plan is finalized. That's how your team moves from assumption-led planning to buyer-informed strategy.

Final checklist

- We reviewed CRM evidence before making decisions.
- We identified what moved, stalled, and created intent.
- We connected major priorities to real buyer or pipeline behavior.
- We assigned owners and next steps.
- We calculated our CRM-Backed Priority Rate.

Want Help Turning CRM Evidence Into Better Strategy?

ContentBacon helps teams connect CRM insights, content strategy, campaign planning, and sales follow-up so marketing supports the way buyers actually move.

BOOK A STRATEGY CALL

LET'S GET COOKING!

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