



MONDAY CRM IMPLEMENTATION

Bringing Sales, Client Onboarding and Campaign Handoffs into One Workflow

Industry focus: Marketing and Creative Agency

BUSINESS OVERVIEW

Marketing and creative agencies manage enquiries that can become strategy projects, brand work, websites, paid-media campaigns or ongoing retainers. The journey spans discovery, proposal preparation, commercial approval, onboarding, campaign planning and delivery handoff. monday CRM can connect lead, contact, account and deal records through configurable boards, automations and views, while project delivery remains governed by the agency's agreed operational workflow.

Project snapshot

Area	Solution focus
Industry	Marketing, branding, creative production and campaign services
Platform	monday CRM entity boards, connected boards, activity tracking, automations and dashboards; feature access varies by plan
Core challenge	Enquiries, proposals, client details and delivery handoffs tracked in separate tools and conversations
Primary goal	Create a consistent sales pipeline and accountable handoff from won deal to client onboarding
Delivery approach	Discovery, board design, workflow configuration, data migration, integration checks, testing and team adoption

Executive summary

In this illustrative scenario, an agency receives inbound requests for campaign strategy, creative production, website projects and retainers. Sales staff need to qualify the brief, estimate scope, coordinate proposal inputs and agree commercial terms. After a deal is won, account managers and delivery teams need a reliable brief, agreed deliverables, timelines, access requirements and a named client contact.

Liyan IT Solution's proposed monday CRM design uses its Leads, Contacts, Accounts, Deals and Activities entity boards, linked with Connect Boards columns and defined status, owner, date and value fields. Automations can support notifications and board-to-board transitions. A dedicated client onboarding or campaign delivery board can receive the agreed handoff, with the exact setup validated against the selected plan and existing monday work-management environment.

Intended business outcome

Make lead status, proposal ownership, next actions and post-sale responsibilities visible across sales and delivery, reducing reliance on informal handoffs and duplicated status updates.

SOLUTION PRINCIPLE

A won deal is not the end of the workflow: capture the client promise in a structured handoff, assign the next owner and confirm delivery readiness before work begins.

01 | Business Challenges and Requirements

Agency sales is consultative and scope-sensitive. Prospects may request several services, compare proposal options or change priorities during discovery. Once approved, a project must move from sales into onboarding without losing the brief, budget assumptions, client stakeholders or deadlines.

Key challenges in the scenario

- Enquiries from forms, referrals, events and email are recorded inconsistently or not assigned promptly.
- Discovery notes, proposal versions, budgets and approval status are spread across documents and messages.
- Sales stages and qualification criteria vary between account executives.
- The team cannot easily see which proposals need follow-up or why an opportunity is stalled.
- Won deals are handed to delivery with incomplete scope, unclear ownership or missing client inputs.
- Sales and delivery teams maintain overlapping boards without a clear source of truth.
- Management reports require manual consolidation of pipeline, workload and conversion information.

Requirements mapped to monday CRM

Requirement	Proposed approach
Lead intake and qualification	Collect prospects in the Leads board through manual entry, imports or configured forms/integrations; define qualified and disqualified criteria.
Contact and account records	Move qualified leads into Contacts and connect them to Accounts using the built-in entity-board relationships and mapped columns.
Proposal pipeline	Use the Deals board and a visual Pipeline view with agreed stages, owner, deal value, expected close date and next action.
Proposal governance	Track service line, scope summary, proposal date/version, decision makers, budget band and approval status; store files in the agreed document repository.
Follow-up activities	Use Emails & Activities to log calls, emails, meetings and notes where available; feature access depends on plan.
Automations	Create notifications, date reminders and approved board transitions using monday CRM automation recipes; confirm usage limits and plan entitlements.
Client onboarding	Create a connected onboarding board with handoff checklist, account owner, delivery owner, kickoff date and missing inputs.
Reporting and integration	Use dashboards/widgets available on the selected plan; assess email/calendar, form, proposal and project tools for supported integrations or API work.

Discovery and scope decisions

Confirm which monday CRM plan and board architecture are in use, who owns each stage, whether the agency sells fixed-scope projects or retainers, and where proposals, creative assets and project plans live. Decide whether delivery should run in monday CRM's post-sales workflow or a separate monday work-management workspace. Clarify which board is authoritative for client details, project dates, budgets and status to avoid duplicate entry.

SUCCESS MEASURES

Baseline lead response time, qualified-lead rate, proposal turnaround, proposal follow-up completion, win/loss reasons, completeness of won-deal handoffs, onboarding cycle time and CRM adoption. Review measured trends rather than promising a particular improvement.

02 | Proposed monday CRM Solution Design

The design uses monday CRM's connected entity boards to create continuity from prospect to client. Board columns and automations should make responsibilities visible, while the handoff checklist preserves the commercial and creative context needed by delivery.

Core CRM components

Component	Role in the agency workflow
Leads board	Capture incoming enquiries, source, service interest, qualification status, assigned owner and next action.
Contacts and Accounts boards	Maintain people and client organizations, connected to the deals and activities that relate to them.
Deals board and Pipeline view	Track each sales opportunity through discovery, proposal, review, negotiation and outcome; use stage, owner, value and close-date fields.
Connect Boards columns	Link leads, contacts, accounts, deals and onboarding records so teams can navigate related context without recreating all details.
Emails & Activities	Record email communication, calls, meetings and notes in a timeline; availability and tracking options vary by plan.
Automations	Notify owners, update date/status columns, and create approved transitions between boards where supported.
Onboarding board	Proposed workflow board for kickoff, brief approval, access collection, milestones, client stakeholders and delivery acceptance.
Dashboards and widgets	Summarize lead status, deal stages, forecast fields, activity and handoff progress; dashboard capacity and widgets depend on plan.
Sequences / integrations	Sequences can coordinate multi-step outreach on eligible plans; external forms, email, calendar and project tools require connector verification.

Illustrative agency sales pipeline

New enquiry — Record source, requested service, organization and response owner.

Qualified brief — Confirm business need, audience, deliverables, budget range, timing and decision process.

Discovery / scoping — Schedule a meeting and document assumptions, dependencies and success criteria.

Proposal in preparation — Assign proposal contributors, due date, scope owner and pricing review.

Proposal sent — Record version, date, validity period and the follow-up date.

Review / negotiation — Track stakeholder feedback, revisions, procurement and decision timing.

Won / lost — Capture outcome and reason; for a win, create the onboarding handoff and assign delivery ownership.

Integration and data quality

Map columns between boards before enabling automations. Standardize company names, email domains, service categories, currencies and stage labels. Decide how proposal files and approved briefs are stored, and test whether required fields carry across the sales-to-onboarding transition. Email/calendar integrations, external project tools and API-based synchronizations should be scoped separately and tested for duplicates and failed updates.

ACCESS AND GOVERNANCE

Set board permissions, define who can edit deal value and commercial terms, and agree which fields must be complete before a deal is marked won. Keep client-sensitive files in an approved location with access appropriate to sales and delivery roles.

03 | Activity-Led Workflow and Reporting

monday CRM combines structured boards with visual views and configurable automations. The workflow below illustrates how an agency can maintain a clear owner at each stage and pass a complete client brief into delivery.

Illustrative lead-to-client workflow

1. Capture the enquiry

Add the prospect to the Leads board from a configured form, import or approved integration, recording source and service interest.

2. Assign and qualify

Set an owner and assess fit, budget, timing, service need and decision process. Mark disqualified leads with a consistent reason.

3. Create linked records

Move qualified leads into Contacts and connect them to the relevant Account and Deal using configured entity-board relationships.

4. Run discovery

Log meeting notes and confirm deliverables, stakeholders, dependencies, success criteria and decision date.

5. Prepare and send proposal

Assign proposal contributors, track due date and version, then set a follow-up activity after sending.

6. Confirm decision and handoff

Record negotiation changes and outcome. For a win, create or update the onboarding item and pass the approved scope and assumptions.

7. Start onboarding and review

Assign an account/delivery owner, schedule kickoff, track missing inputs and review delivery readiness before campaign work starts.

Automation candidates

- Notify the assigned owner when a new lead enters the board or remains unassigned.
- Set a follow-up date or notify the deal owner when proposal status changes to Sent.
- Create a linked onboarding item when a deal is marked Won, with mapped fields and a checklist.
- Notify delivery when required brief fields, client contacts or access requirements are missing.
- Use status-based automations to group items or alert teams to approaching close and kickoff dates.
- Use Sequences for appropriate multi-step outreach only if included in the plan and consent rules are met.

Management dashboards

Report	Question it helps answer
Lead status by source	Which channels generate qualified enquiries rather than just volume?
Pipeline by stage and owner	Where are proposals concentrated, and which opportunities need attention?
Proposal turnaround and follow-up	Are proposals delivered and followed up within agreed service levels?
Forecast and expected close	What does the current pipeline suggest, given documented values and close probabilities?
Won-deal handoff completeness	Do delivery teams receive the approved brief, owner, timeline and dependencies?
Onboarding readiness	Which new clients are waiting on kickoff, access, content or approvals?

REPORTING DISCIPLINE

Agree stage definitions, data owners and reporting periods before launch. A board status is only as reliable as its updates; forecast fields and dashboard widgets should be validated against actual agency sales practices.

04 | Implementation Roadmap and Expected Outcomes

A phased rollout lets the agency align its sales and delivery teams on the handoff, clean up existing records and test board-to-board transitions before using the workflow for live client work.

Suggested delivery roadmap

Phase	Key activities	Deliverable
1. Discover	Review services, lead sources, sales roles, proposal workflow, delivery tools and reporting needs.	Approved requirements and scope
2. Design	Define entity-board relationships, pipeline stages, column mapping, handoff criteria and dashboard metrics.	Board and process design
3. Configure	Set up boards, columns, views, permissions, automations and onboarding checklist.	Configured test workspace
4. Prepare & Connect	Clean and import leads/accounts; validate forms, email/calendar and approved project-tool connections.	Validated records and integrations
5. Test & Train	Test qualification, proposal revisions, won-deal handoff, permissions, dashboards and exceptions.	User acceptance sign-off
6. Launch & Optimize	Go live, monitor adoption, review handoff quality and tune automation and dashboards.	Live workflow and improvement backlog

Expected business benefits

- A clearer view of lead ownership, proposal status and the next sales action.
- More consistent qualification and proposal follow-up practices across account executives.
- Better continuity between sales, account management and creative delivery.
- Fewer undocumented handoffs and clearer visibility into missing client inputs.
- More useful management reviews of pipeline health, expected close dates and onboarding readiness.
- A flexible workflow foundation that can evolve with the agency's services and team structure.

How outcomes should be reviewed

30 days: Check board adoption, lead ownership, data completeness and whether the sales stages reflect actual work. **60 days:** Review proposal turnaround, follow-up completion, forecast hygiene and won-deal handoff completeness. **90 days:** Compare qualified-lead progression, onboarding readiness and team feedback with the baseline; prioritize improvements based on verified records.

Why Liyan IT Solution

Liyan IT Solution supports CRM implementation, workflow configuration, data migration, integration planning and technical support. The approach emphasizes practical board design, clear ownership and a reliable handoff between commercial commitments and delivery work.

LET'S DISCUSS YOUR MONDAY CRM REQUIREMENTS

Share your sales pipeline, proposal process, delivery tools and onboarding checklist. Liyan IT Solution can help design a monday CRM workflow that fits how your agency sells and delivers work.

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