2026 EDITION

The Agentic CRM Playbook for SMEs

A practical end-to-end system to discover prospects, warm them across channels, capture every touchpoint, and convert reliably — with full traceability.

10+
TOUCHPOINTS TRACKED

24/7
LEAD CAPTURE

14–90
DAY ROADMAP

Web scan prospecting · LinkedIn warm-up · Email sequences · WhatsApp + webchat · Website CTA attribution · Single lead timeline

What's Inside

How to use this playbook

Start with Chapters 2 and 6 if you want clarity fast: define the operating model, then lock touchpoint tracking. Everything else becomes straightforward once your timeline is reliable.

CHAPTER 1

The modern SME CRM problem

Most SMEs don't fail because they lack leads. They fail because **leads leak** across disconnected touchpoints: LinkedIn comments, DMs, email opens, WhatsApp messages, webchat enquiries, and website forms.

When those signals don't land in one place, teams default to guesswork: "Who should we follow up?", "Which message worked?", and "Why did this deal go quiet?"

SYMPTOMS

- ✗ Follow-up depends on memory
- ✗ Sales conversations happen in chat apps
- ✗ No consistent next action
- ✗ No attribution across channels
- ✗ Pipeline looks healthy until it's not

WHAT "GOOD" LOOKS LIKE

- ✓ Every lead has a timeline
- ✓ Every touchpoint is timestamped
- ✓ Every stage has an owner
- ✓ Every channel has an SLA
- ✓ Booked calls become predictable

< 5 min	< 2 hrs	1
Target response for webchat / inbound enquiries	Target response for LinkedIn DMs / WhatsApp	Timeline per lead (single source of truth)

The core rule

If it's not in the timeline, it didn't happen. The timeline is where execution becomes reliable: follow-ups, routing, attribution, and forecasting all depend on it.

Where leakage happens (common)

- **LinkedIn engagement** happens, but nobody records what the prospect reacted to.
- **Playbook downloads** capture emails, but the CRM never links the email back to a LinkedIn profile.
- **Email opens/clicks** are visible in email tools, but not in the lead's timeline where sales works.
- **WhatsApp/webchat** conversations stay in chat apps and never become pipeline objects.
- **Website CTAs** are clicked, but you can't trace which post/sequence triggered it.

Outcome to aim for

For every booked call, you should be able to answer in 30 seconds: **source** → **trust signals** → **nurture** → **conversion** (with timestamps).

CHAPTER 2

The lead-to-revenue operating model

This playbook is a **client-facing blueprint** based on what we implement in Nexius systems: a lead-to-revenue operating model that is simple enough for SMEs, but strict enough to scale.

> **Design principle**
>
> **One pipeline, one owner per stage, one next action.** No orphaned leads, no "we'll follow up later".

Recommended pipeline stages

Prospect | Lead | MQL | SQL | Call booked | Proposal | Closed won | Closed lost

Stage definitions (simple)

- **Prospect:** identified target; no two-way interaction yet.
- **Lead:** known identity (email and/or LinkedIn URL) captured.
- **MQL:** shows engagement (download/click/reply/DM) that matches your ICP.
- **SQL:** confirmed need + time window, or explicitly asked for help.
- **Call booked:** meeting scheduled; prep notes captured in timeline.

> **One next action rule**
>
> Every lead should have exactly one "next action" with an owner and a due date (even if it's "continue nurture"). This prevents invisible stagnation.

MAP → SIMPLIFY → AUTOMATE

1. **MAP touchpoints + handoffs**
   List every inbound and outbound touchpoint (LinkedIn, email, WhatsApp, webchat, website CTA). Define what counts as a "signal".
2. **SIMPLIFY the rules**
   Define next-action rules per stage: who owns it, how fast to respond, and what "done" means.
3. **AUTOMATE capture + routing**
   Automate event logging (opens/clicks/replies, inbound chats), lead scoring, and task assignment — but keep approvals for high-risk steps.

CHAPTER 3

Acquisition engines: web scan + LinkedIn

We treat acquisition as two engines feeding the same intake. The rule is simple: **no intake, no follow-up**. If a prospect can't be uniquely identified, the system will duplicate work and lose context.

ENGINE A

Web scan prospecting

Discover companies using directories, job posts, keyword scans, and intent signals. Output a shortlist with enrichment fields and clear ICP tags.

ENGINE B

LinkedIn prospecting

Build a daily shortlist from filters. Connect, engage, and start conversations only after you've created measurable trust signals.

Minimum intake schema (must-have fields)

Person: name, role, LinkedIn URL. **Company:** name, domain, size/industry. **Source:** web scan or LinkedIn. **Tags:** ICP segment + intent notes. **Owner:** who is responsible for the next action.

Deduping keys (recommended)

- **Primary:** email (lowercased) when available.
- **Secondary:** LinkedIn profile URL (canonicalized) if email is unknown.
- **Company match:** domain as the stable identifier (avoid company name variants).

Why this matters

Without deduping, the same prospect appears as multiple "leads", each with partial context — and follow-up becomes random.

ICP fit checklist (quick)

- **Complex operations:** multiple handoffs (sales → ops → finance) and recurring exceptions.
- **System sprawl:** spreadsheets + CRM + accounting + WhatsApp + email without a single timeline.
- **High value per lead:** one booked call can justify disciplined follow-up.
- **Signals exist:** they engage on LinkedIn or respond to email (not purely cold lists).

Daily acquisition operating loop

1. **Source**
   Generate a shortlist (web scan + LinkedIn) with consistent tags and owner.
2. **Enrich**
   Capture domain, role, and the "why now" note (job post, expansion, tool change, pain indicator).
3. **Queue**
   Assign next action (connect, comment, asset share) with a due date — no orphaned prospects.

CHAPTER 4

Warming system: engagement → trust signals

LinkedIn is not just "top of funnel". Done properly, it becomes a measurable warming system. The goal is to convert anonymous awareness into known identity and intent — without sounding like outreach.

Trust signals to capture (examples)

Profile view | Connection accepted | Comment replied | DM started | Post engaged | Playbook clicked

COLD OUTREACH

- ✗ No context
- ✗ Low reply rates
- ✗ Feels salesy
- ✗ Hard to attribute

SIGNAL-LED OUTREACH

- ✓ Engagement history
- ✓ Higher intent
- ✓ Natural conversations
- ✓ Traceable path to booked call

Operational rule

No DM pitch until signals exist (or explicit inbound intent). The timeline should show why you reached out: what they engaged with, and when.

Suggested warm-up sequence (example)

- **Day 0:** connect + 1 relevant comment (log the post URL).
- **Day 1–3:** react/comment on 2 posts + one short DM only if they reply.
- **Day 4–7:** share an asset (playbook/case study) only if there's engagement.
- **Day 7+:** move to a call when they show intent (reply/click/inbound question).

What to log (minimum)

Engagement type, timestamp, and the content context (which post or message). This makes follow-up coherent and prevents "random" outreach.

Engagement logging template (fast)

- **Context:** post/topic (URL or short title)
- **Action:** like/comment/DM + what was said (1 line summary)
- **Signal:** did they reply/click/ask a question?
- **Next:** one next action + due date

Guardrails (to avoid spam)

Limit outreach frequency. Don't send multiple DMs without a response. If there's no signal after 2–3 interactions, move to nurture (content + periodic check-ins).

CHAPTER 5

Conversion system: email + CTA paths

Conversion is multi-path. A lead might download your playbook, reply to an email, DM you, then ask a question on WhatsApp. Your system must join those touchpoints into one narrative.

PATH 1

LinkedIn → Playbook (gated) → Email sequence

Capture email, tag the source, start nurture automatically, and log opens/clicks/replies back into the CRM timeline.

PATH 2

Website CTA → Form/webchat/WhatsApp

Inbound enquiries create a lead immediately, assign an owner, and enforce response SLAs with reminders.

Sequence readiness gates (recommended)

Don’t send sequences blindly. Use simple gates: valid business email, ICP match, no recent outreach, and a minimum score threshold. Log why each sequence started.

Touchpoints to capture from email

- **Open:** good for awareness, but weak intent alone.
- **Click:** stronger intent — log which link they clicked (playbook, booking, case study).
- **Reply:** highest intent — auto-escalate to human follow-up.
- **Unsubscribe:** update lead preference and stop sequences.

SLA suggestion

If a lead **replies** or sends inbound chat, treat it as time-sensitive: reply within 2 hours during business hours.

Asset map (what each CTA is for)

- **Playbook:** capture email + start nurture; best for “interested but not ready”.
- **Case study:** prove credibility; best for “evaluating vendors”.
- **Booking link:** convert intent into a meeting; best for “ready to talk”.

Common failure modes (and fixes)

- **Sequence runs too early:** add readiness gates + score threshold.
- **Clicks don’t route:** click should create a task when it crosses intent threshold.
- **Chat enquiries get lost:** inbound chat must create a lead + owner automatically.

CHAPTER 6

Touchpoint tracking: events + timeline

Tracking is not “analytics”. It’s operational memory. A timeline answers four questions for every lead: **What happened? When? Who owns next? Why?**

Event types (minimum viable)

LINKEDIN

connect_sent, **connect_accepted**, comment_left, dm_sent, dm_reply, post_engaged

EMAIL

sent, delivered, **open**, **click**, **reply**, unsubscribe

WEBSITE

form_submit, playbook_download, booking_click, key_page_view

CHAT

whatsapp_inbound, webchat_inbound, resolved, escalated

Non-negotiable

Every event must have: lead id, timestamp, channel, and (when human) owner. This is what makes automation safe — and what makes sales follow-up reliable.

What a good timeline looks like (example)

- **2026-02-18 10:12** — LinkedIn: connection accepted
- **2026-02-18 10:20** — LinkedIn: commented on “Agentic ERP” post (URL logged)
- **2026-02-18 10:45** — Website: playbook download (UTM: linkedin / featured)
- **2026-02-18 10:46** — Email: sequence started (reason: download + ICP match)
- **2026-02-18 12:05** — Email: clicked booking link → score threshold crossed
- **2026-02-18 12:07** — Task created: human follow-up due in 2 hours

Event payload fields (minimum)

- **who:** lead id, owner (if human)
- **what:** event type + short summary
- **where:** channel + URL (if applicable)
- **when:** timestamp (store UTC + local display)
- **why:** reason code (e.g., “download”, “reply”, “manual follow-up”)

Data hygiene tip

Always normalize emails and LinkedIn URLs before writing events. Small inconsistencies create duplicates and break attribution later.

CHAPTER 7

Scoring + routing: nurture vs escalate

Once your events are reliable, scoring becomes simple. You're not building a complex ML model — you're creating a consistent escalation rule so hot leads don't wait.

Example scoring signals

+ **High intent**
  Inbound WhatsApp/webchat, booking click, email reply, repeated page views.

~ **Medium intent**
  Playbook download, email click, LinkedIn DM started, multiple post engagements.

- **Low intent**
  Single open only, one-off engagement without follow-through.

Routing rules (simple)

Hot: create a task for human follow-up within 2 hours. **Warm:** continue nurture and set next action date. **Cold:** drip content + re-check monthly.

Escalation triggers (recommended)

- Email reply (any)
- Booking link click (with repeat visits)
- Inbound WhatsApp/webchat enquiry
- Multiple high-signal events inside 48 hours (download + click + DM)

Simple scoring bands (example)

WARM (NURTURE)

✗ Playbook download
✗ Email open + one click
✗ LinkedIn engagement without questions

HOT (ESCALATE)

✓ Email reply with problem context
✓ Inbound WhatsApp/webchat
✓ Booking click + repeated visits

Operational goal

Hot leads should never wait. The system exists to **move human attention** to the right place at the right time.

CHAPTER 8

Dashboards + attribution

Attribution is only possible when touchpoints are connected. Your dashboard should answer one question: **What reliably produces booked calls and closed-won?**

CHANNEL PERFORMANCE

Leads by source, MQL rate, SQL rate, cost per booked call.

SPEED

Median response time by channel, SLA breaches, follow-up lag.

SEQUENCE OUTCOMES

Open rate, click rate, reply rate, and time-to-reply by segment.

PIPELINE HEALTH

Stage conversion, aging, and next-action compliance.

Practical KPI set

Track outcomes first (booked calls, proposals, closed-won). Then track the controllables (response time, follow-up lag, and high-intent events captured).

Attribution fields to standardize

- **utm_source**, **utm_medium**, **utm_campaign** (minimum)
- **content id** (post id / email id / asset id)
- **first touch** vs **last touch** (don't mix them)

Why this matters

When a lead books a call, you can identify the assets and touchpoints that created the conversion — and scale what works.

Weekly operating rhythm (recommended)

- **Mon:** review sources → double down on channels producing booked calls.
- **Wed:** review response SLAs and follow-up lag (fix leakage).
- **Fri:** review pipeline aging + next actions (no stalled deals).

Funnel metrics worth tracking

Lead → MQL
Are we attracting the right prospects?

MQL → SQL
Are we creating intent?

SQL → Call
Is follow-up fast and clear?

CHAPTER 9

Implementation roadmap (14 / 30 / 60 / 90 days)

This rollout is designed for SMEs: start with the minimum system that prevents leakage, then deepen automation once the timeline is trustworthy.

Days 0–14

Define the operating model

Goal: eliminate ambiguity so leads don't leak.
Do: finalize pipeline stages + owner per stage, response SLAs (LinkedIn/email/chat), and the lead schema (email, LinkedIn URL, domain, tags, source).
Standardize: event taxonomy across channels (what counts as an "event", required fields, and naming).
Output: a one-page operating spec your team can follow without interpretation.

Days 15–30

Connect lead sources + capture timelines

Goal: every inbound/outbound touchpoint lands in one lead timeline.
Connect: web scan intake, LinkedIn prospecting list, website forms/CTA, playbook gated download, webchat, and WhatsApp inbound.
Enforce: dedupe keys (email / LinkedIn URL / domain) so a prospect doesn't split into multiple leads.
Output: a reliable timeline that shows who did what, when, and what's next.

Days 31–60

Automate nurture + routing

Goal: convert signals into consistent follow-up, without spamming.
Implement: email sequences with readiness gates, trigger reasons (download, click, reply), and suppression rules (opt-out, cooling windows).
Route: scoring bands (warm/hot) that create tasks automatically, assign owners, and set due dates based on SLAs.
Output: the system produces next actions automatically; humans focus on high-intent conversations.

Days 61–90

Optimize conversion + dashboards

Goal: scale what works using evidence, not opinions.
Measure: attribution (first/last touch), funnel conversion (lead→MQL→SQL→call), and speed metrics (response time, follow-up lag).
Iterate: tune sequences, CTAs, and routing thresholds using weekly reviews and closed-won learnings.
Output: a repeatable growth loop — content + nurture + routing + conversion — with traceability.

Deliverables per phase (example)

- **14 days:** pipeline + SLAs + lead schema + event taxonomy documented.
- **30 days:** all inbound channels create leads; timeline logging is reliable.
- **60 days:** sequences + scoring + routing produce tasks automatically.
- **90 days:** dashboards + attribution guide weekly optimizations.

CHAPTER 10

CRM automation readiness checklist

If you can check at least 8 items, you're ready to implement quickly. If not, start with process clarity — it pays off immediately.

Process readiness

- ✓ We have one pipeline with clear stage definitions
- ✓ Each stage has an owner and a "next action" rule
- ✓ We have response SLAs for LinkedIn, email, and chat channels
- ✓ We review pipeline aging weekly

Data + tooling readiness

- ✓ We can uniquely identify leads (email and/or LinkedIn URL + company domain)
- ✓ We can tag lead sources and campaigns (UTM or equivalent)
- ✓ We can capture email events (open/click/reply) into the timeline
- ✓ We can capture inbound WhatsApp/webchat into the timeline

Governance readiness

- ✓ We have opt-out handling for email sequences
- ✓ We keep audit logs (who changed what, when)
- ✓ We have a human approval step for high-risk outbound

> **Start small**
>
> Don't automate everything first. Lock the timeline and next-action rules. Then automate nurture and routing. That's how SMEs win — with execution quality.

Minimum tool stack (practical)

- **CRM:** pipeline + tasks + custom properties
- **Email:** sequences + tracking (open/click/reply)
- **Chat:** WhatsApp/webchat inbox with export or webhook capability
- **Attribution:** UTM tagging + form capture

Governance basics (don't skip)

- Respect opt-outs and keep a suppression list.
- Log who sent outbound messages (human vs automation).
- Use approvals for high-risk steps (e.g., proposals, pricing, sensitive claims).

Want this system implemented for your SME?

Book a free 15-minute assessment. We'll map your lead leakage points, define your touchpoints, and propose a practical rollout plan.

Book a 15-minute assessment →

Melverick Ng

Founder, Nexius Labs

www.nexiuslabs.com | melverick@nexiuslabs.com

LinkedIn