Transpond
by Capsule

The Agency Campaign Set up Checklist

From CRM sync to send: everything you need to tick off before a client campaign goes live

- [x] Connect the client's CRM
- [x] Build segments from live data
- [ ] Retire the manual exports
- [ ] Spam test, test send, sign-off
- [ ] Press send and report the wins

The Agency Campaign Setup Checklist

Everything to tick off before a client campaign goes live, from CRM sync to send. Run it for every new client, then reuse phases 3 to 7 for every campaign after that. No manual exports required.

1 Onboard the client

Do this once per client. It makes every campaign after it faster.

- [ ] **Collect access** CRM admin invite, social page admin access, sending domain details
- [ ] **Gather brand assets** logo, colors, fonts, or point Brand Analyzer at their website
- [ ] **Agree goals and KPIs** what does success look like: replies, bookings, sales, signups?
- [ ] **Confirm compliance basics** consent source for the list, sender name and address, opt-out wording
- [ ] **Set up their workspace** create the client account under your white label domain and set user roles

Tip: Agree KPIs in writing before the first send. It turns every monthly report into proof, not debate.

2 Connect the data

This is the step that replaces manual exports for good.

- [ ] **Connect the client's CRM** use the native sync where available, Capsule syncs in real time
- [ ] **Check field mapping** email, first name, company, plus any custom fields you'll personalize with
- [ ] **Test the sync** update one contact in the CRM and confirm it updates in the platform
- [ ] **Retire the workarounds** switch off the zaps and delete the export spreadsheets this replaces
- [ ] **Add site tracking** install tracking on the client's website to see what contacts do after they click

3 Build the audience

- [ ] **Create segments from CRM data** recent purchasers, lapsed contacts, industry, pipeline stage
- [ ] **Set up lead capture** embedded form on their site, or a hosted form if you can't touch the site yet
- [ ] **Switch on double opt-in** so every new signup is real and willing
- [ ] **Clean the list** remove known bounces and anyone without a clear consent source

4 Build the campaign

- [ ] **Build the template on-brand** Brand Analyzer themes, the gallery, or import custom HTML
- [ ] **Write the subject line and preview text** draft three, pick the strongest
- [ ] **Check every merge tag** with a fallback for contacts missing that field
- [ ] **Test every link** and tag them with UTMs so results show up in the client's analytics
- [ ] **Run the spam test** fix anything it flags before send
- [ ] **Send a test email** check it on desktop and mobile, then get a second pair of eyes

Tip: Read the test send out loud. If a sentence trips you up, it'll trip the reader too.

5 Automate the follow-up

- [ ] **Connect the follow-up sequence** welcome series, nurture, or re-engagement, triggered by the campaign
- [ ] **Check waits and conditions** walk the whole journey on one screen before switching it on
- [ ] **Set SMS fallbacks** if a step sends a text, decide what happens for contacts without a valid number
- [ ] **Add an internal alert** a Slack or email step so your team knows when a hot lead acts

6 Launch

- [ ] **Sanity-check the segment count** does the audience size match what you expect?
- [ ] **Confirm the send time** scheduled for when the client's audience is actually awake
- [ ] **Get client sign-off** recorded in writing, attached to the campaign
- [ ] **Press send** or schedule it and move on to the next client

7 Report and improve

- [ ] **Review the dashboard** opens, clicks, replies, and conversions against the KPIs from phase 1
- [ ] **Check the conversations inbox** replies are leads, answer them fast
- [ ] **Log one learning** what you'd change next time, while it's fresh
- [ ] **Template what worked** save the campaign and automation as a starting point for the next client