

ASSITER AUCTIONEERS

Revenue Operations Infrastructure

An Integrated Lead-to-Activation System

Seller Inquiry CRM

+

Modular Email Builder

One System. Two Engines. Zero Revenue Gaps.

THE CHALLENGE

Seller inquiries fell through cracks in intake. Email campaigns were built by hand. Two critical revenue functions operated in silos — creating data loss, brand inconsistency, and operational drag.

THE SOLUTION

A closed-loop revenue operations stack: a structured CRM pipeline captures and qualifies sellers; an automated email system activates and communicates with them — connected by shared contact data.

THE OUTCOME

End-to-end lead lifecycle management from first inquiry to auction campaign deployment, with automated quality controls, role-based workflows, and a scalable architecture.

Two systems. Both broken. Together: a leaking revenue pipeline.

CRM / Intake

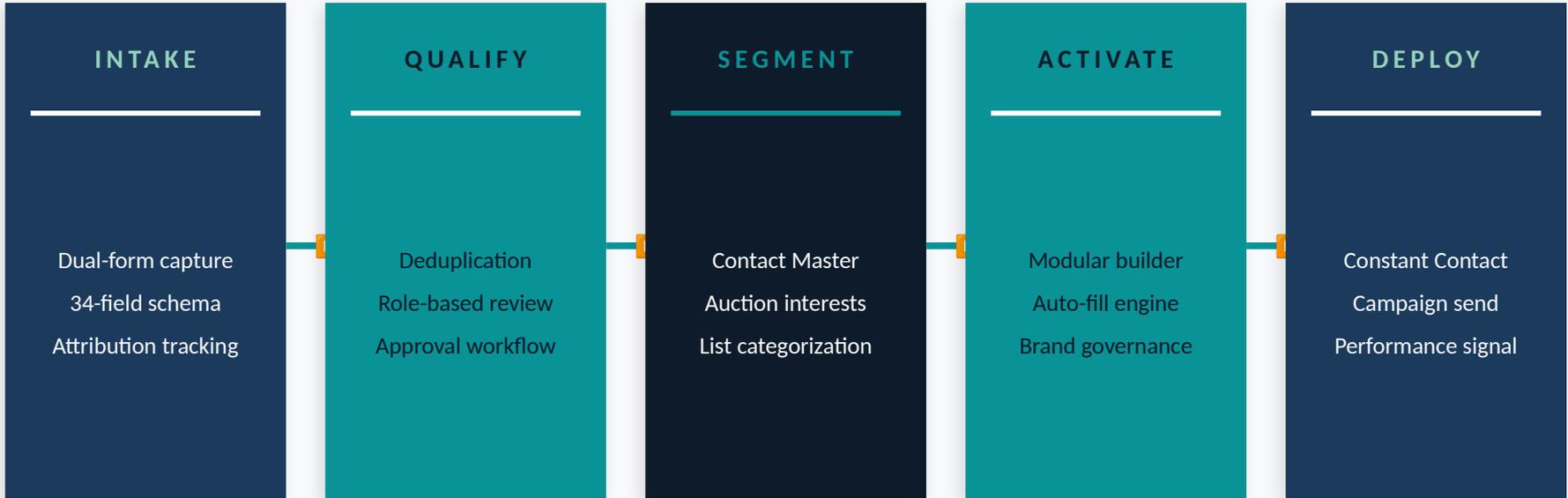
- No centralized pipeline — inquiries via web, staff, walk-ins with no unified capture
- Contact data fragmented across spreadsheets causing duplicate outreach and lost follow-ups
- No structured approval workflow — decisions lived in conversations, not systems
- Staff had no standardized handoff between intake, review, and owner decision

Email / Activation

- Manual HTML assembly per campaign type — hours per send, no repeatable framework
- Completed emails had to be manually transferred into Constant Contact — error-prone at every step
- No modular architecture — each email rebuilt from scratch, relying on one operator's expertise
- Brand assets referenced ad hoc — wrong images deployed without a control layer

CLOSED-LOOP ARCHITECTURE

One integrated system — from seller inquiry to campaign deployment.



 *Closed loop — contact data, engagement signals, and segmentation updates flow back into the CRM, refining future activation*

How a seller becomes a campaign-activated auction participant — step by step.

01

Capture

Seller submits via public form or staff intake. 34-field schema records contact, property, pricing, and lien data. Attribution source logged.

02

Validate

Automation triggers: record ID stamped, SMS eligibility checked, intake status set to Under Review. Deduplication engine keys contact.

03

Review

Role-based interfaces route record to staff → manager → owner. Each stage has scoped views. Approval decision recorded with audit trail.

04

Segment

Approved contact added to CRM Master with type, auction interest tags, and outreach eligibility flags. Ready for activation.

05

Build

Operator selects segments in Email Builder. Auction modules auto-fill from listing URLs. Banner keys enforce brand assets.

06

Deploy

Generated HTML pushed to Constant Contact in one click. Campaign launched to qualified, segmented audience. Loop complete.

DEDUPLICATION ENGINE

1. Normalize

Phone → E164 · Email → lowercase stripped

2. Key Generation

Contact Key = email + phone concatenated

3. Match Detection

Linked Duplicates auto-populated per record

4. Flag & Review

Has Duplicates boolean · Merge Status tagged

5. Action Queue

Confirmed Duplicates views for admin resolution

CONTACT SEGMENTATION MODEL

Contact Type

Consignor · Dealer · Bidder · Vendor · Staff

Auction Interests

Land/Farm · Automotive · Estate · Equipment · Gaming

Outreach Flags

SMS Opt-in · Do Not Text · Opted Out

Source Attribution

Web Form · Staff · Referral · Walk-in · Event

Pipeline Status

New · In Progress · Qualified · Approved · Closed

Event-driven triggers across both systems eliminate manual touchpoints at every stage.

CRM — Airtable Automation Layer

Record Initialization

On new intake submission → auto-stamp Record ID + initialize all computed fields regardless of intake source

Status Propagation

When intake fields reach threshold conditions → downstream workflow fields update to reflect current pipeline stage

SMS Eligibility Check

Form submission hook → evaluates opt-in status and sequences SMS outreach via DialMyCalls integration

Approval Routing

Branched conditional logic enables alternate intake pathways without schema duplication — 4 active, 1 staged

Email Builder — Apps Script Logic Layer

URL-Driven Auto-fill

Operator pastes one URL → system resolves title, description, and primary image — eliminating all manual lookup steps

Module Validation

On generate request → validates all required fields per module type, surfaces inline errors before any HTML is produced

Key-Based Asset Resolution

Banner key dropdown → resolves brand-approved image + hyperlink pair from internal registry, enforcing brand governance

One-Click Deployment

Copy Output → complete production HTML transferred to Constant Contact clipboard — zero reformatting, zero re-entry

Purpose-built views eliminate context-switching and surface only relevant data to each stakeholder.

Intake Staff

CRM

Full intake record view filtered by status. Search, filter, group, and create records via form.

Operations Manager

CRM

Bulk review queue across pipeline stages. Manages assignment and escalation paths.

Business Owner

CRM

Final decision interface: Approved / Declined / Follow-Up / Under Review queues.

Field Staff

CRM

Simplified review queue focused on record completeness and flag resolution before escalation.

Email Operator

Builder

Drag-to-reorder module canvas with live preview. Collapse/expand, add/remove, deploy in one session.

Marketing Lead

Builder

Segmented contact lists exported to Constant Contact by auction interest category from CRM Master.

OPERATIONAL EFFICIENCY GAINS

~80%

Reduction in
email build time

Hours → 15 min
per campaign

5+

Manual steps
eliminated per send

Auto-fill, asset lookup,
HTML transfer, QA

34

Field intake
schema enforced

vs. ad hoc capture
across 3+ tools

7

Role-scoped
interfaces deployed

Zero information
overload or spillover

BEFORE → AFTER

✗ Fragmented contacts across spreadsheets and email

✓ Unified CRM master with deduplication and normalized keys

✗ Verbal/email-based approval decisions with no audit trail

✓ Stage-gated pipeline with role-locked decision interfaces

✗ Brand assets referenced ad hoc per campaign

✓ Key-based registry enforces approved assets — zero violations

Every design decision was evaluated against: "What happens when this needs to support 5× the volume?"

01

Schema-First Design

Conditional subsections and hidden processing fields allow new auction categories and data points to be added without breaking existing records or requiring schema refactoring.

02

Decoupled Contact Layer

CRM Contacts Master operates independently of the intake pipeline — serving as a shared source of truth for marketing, outreach, analytics, and future third-party integrations.

03

Module Isolation Pattern

Each email content type (Auction, Banner, Announcement, Holiday) is self-contained with its own schema, template, and validation. New types are added without touching existing modules.

04

Automation-Ready Architecture

Trigger-based automation is pre-wired for extension: SMS via DialMyCalls, CRM sync, UTM tagging, and API-first output are achievable without schema changes.

Zero-Marginal-Cost Scaling

Google Apps Script web app model supports unlimited concurrent users via existing Google Workspace permissions — no licensing fees, no IT provisioning, no seat management.

Attribution & Analytics Foundation

Lead Source, Referrer, Found Via, Contact Type, and Auction Interest fields create the data layer required for pipeline attribution, CAC analysis, and marketing ROI as scale grows.

Two platforms. One data contract. Zero integration overhead.

DATA LAYER

- Airtable — Seller Inquiry CRM + CRM Contacts Master
- Relational data model: Leads, Intake, Contacts, Follow-Up Notes
- Deduplication keys, segmentation flags, attribution fields

AUTOMATION LAYER

- Airtable Automations (5) — event-driven triggers + conditional logic
- Google Apps Script — module validation, auto-fill engine, HTML generation
- DialMyCalls — SMS outreach integration (staged for activation)

OUTPUT LAYER

- Constant Contact — ESP deployment via custom HTML editor
- Email-safe HTML output (DOCTYPE, inline styles, Outlook/Gmail compatible)
- ESP-agnostic output — portable to Mailchimp, HubSpot, Klaviyo with zero reformatting

ACCESS & GOVERNANCE

- Google Workspace SSO — zero separate authentication system
- Role-based Airtable interfaces — scoped access per stakeholder function
- Key-based asset registry — brand governance without CMS overhead

Impact across three dimensions: Revenue Enablement · Brand & Data Integrity · Operational Efficiency

Revenue Enablement

- High-intent sellers no longer fall through cracks — every inquiry captured, assigned, and tracked to decision
- Faster campaign execution supports higher send frequency without proportional headcount increase
- Closed-loop contact data enables retargeting, follow-up cadence, and conversion rate optimization
- Referral attribution tracking creates the foundation for CAC analysis and source ROI measurement

Data & Brand Integrity

- Automated deduplication prevents redundant outreach and protects sender reputation at scale
- Key-based asset registry eliminates off-brand deployments — zero brand compliance incidents
- Structured input schema prevents malformed HTML from reaching the ESP or the inbox
- Role-scoped interfaces prevent accidental record modification and data contamination

Operational Efficiency

- Email build time reduced ~80% — from multi-hour manual effort to a 15-minute structured workflow
- 5+ manual lookup and data entry steps eliminated per campaign via URL-based auto-fill engine
- New staff productive from day one — tribal knowledge encoded into self-serve, predictable tooling
- Approval audit trail replaces verbal/email decisions, reducing escalation ambiguity to zero

The system is operational. These initiatives extend its value without architectural changes.

PHASE 1

Immediate Activations

Enable SMS Automation (A4) → DialMyCalls post-form-submit outreach sequencing

Activate UTM auto-append on all CTA links at email generation time

Add template save/load to Email Builder for frequent campaign configurations

PHASE 2

Data Integration

CRM-connected auto-fill → pull auction metadata from internal inventory database

Dynamic asset registry → manage Banner Keys via Google Sheets vs. hardcoded config

Send history log → record email metadata (date, type, operator) for campaign analytics

PHASE 3

Platform Maturation

Build pipeline velocity / attribution reporting dashboard in Airtable Interfaces

API-first output → expose email generation as endpoint for CRM-triggered automation

Multi-brand support → brand-specific module palettes and asset registries per account

This system demonstrates applied RevOps thinking — not just technical execution.

Revenue Operations Design

Lead pipeline architecture, stage-gated approvals, attribution tracking, contact lifecycle management

Business Systems Engineering

Custom CRM build, schema design, relational data modeling, role-based access architecture

Workflow Automation

Event-driven triggers, conditional branching, SMS sequencing, form submission hooks

Data Integrity Engineering

Deduplication engine, normalization pipelines, merge workflows, segmentation modeling

Product Thinking

Graceful degradation, progressive disclosure, inline validation, operator-centric UX design

Scalability Architecture

Module isolation, decoupled data layers, automation-ready wiring, ESP-agnostic output

ASSITER AUCTIONEERS

Revenue Operations Infrastructure

*Built to capture every lead. Structured to qualify every opportunity.
Automated to activate every campaign.*