



How CRMs Can Drive Efficiency for Media Organizations








LeadG2 Webinar Summary – May 9, 2025

This summary distills the core insights and recommendations from the LeadG2 webinar hosted by Marianne McWhirter and Carly Knecht. With decades of combined experience in digital media and CRM implementation, the presenters explored how media organizations can modernize and optimize their sales processes using Customer Relationship Management (CRM) systems like HubSpot. The conversation emphasized real-world use cases, change management tactics, and tools that drive efficiency, accountability, collaboration, and ultimately, revenue growth. Whether you're evaluating a CRM for the first time or looking to maximize your current system, these insights are essential for modern media leaders.

Want to watch the replay yourself? Here's the [link](#).

Key Takeaways:

CRM as a Strategic Sales Engine

-  CRMs are more than 'contact databases', *they're human relationship systems.*
-  Focus on revenue impact- show sellers how *CRM adoption helps close more deals.*
-  Say goodbye to messy spreadsheets- *CRMs offer clear visual pipelines.*
-  Accurate forecasting depends on good data- *'Data in = Data out.'*
-  *Start small*- implement 2–3 key features to gain traction, then scale.
-  *Custom reports should answer real business questions*- build based on the top 10 insights you need.
-  *Review, analyze, optimize*- always iterate on automation and outreach based on performance data.

Sales Efficiency & Automation

-  Automations (reminders, emails, tasks) *keep reps on track and reduce errors.*

- 🕒 Follow-up timing matters- *CRMs can enable perfectly timed outreach via real-time alerts.*
- 📁 Use sequences and personalization tokens to *scale outreach without losing the personal touch.*
- 🗣️ Use CRM dashboards in 1:1s and team meetings to reinforce use without micromanagement.
- 🛠️ CRM onboarding is smoother with training videos, process documentation, and champions.

👏 Team Collaboration & Tech Integration

- 👁️ Real-time dashboards help managers *coach reps, spot trends, and improve accountability.*
- 💬 *CRMs foster collaboration and avoid prospect overlap* with shared notes and ownership visibility.
- 🏆 Celebrate wins from CRM usage- *competition and success stories fuel adoption.*
- 🤝 **CRM integrations (e.g., WideOrbit, Google Ads) are essential for modern media tech stacks.**