Digital Tools for Agency New Business

NAVIGATING AGENCY GROWTH
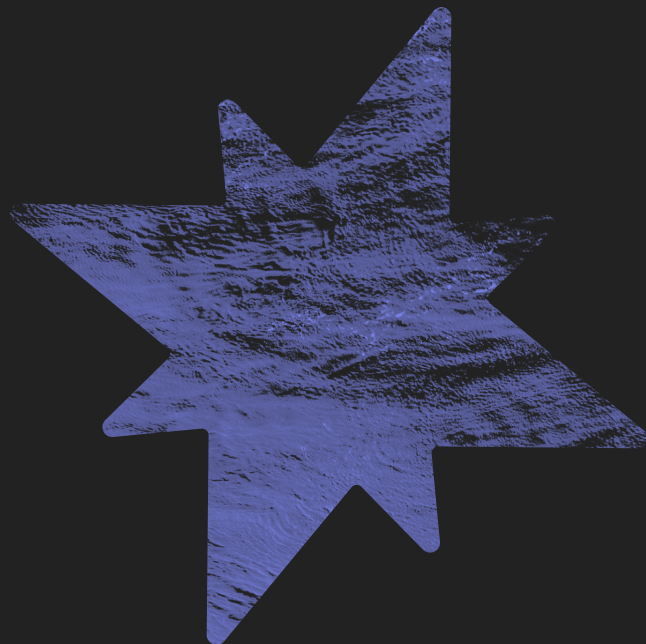
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Meet Sail

Everyday creativity is associated with feeling happy, active, and relaxed. However, the demands of agency growth often drain the resources and energy that creativity relies on. Sail helps relieve the heavy weight of new business, allowing creative companies to focus on what they're truly passionate about.

Sail focuses all our energy on developing agency new business, so you don't have to.

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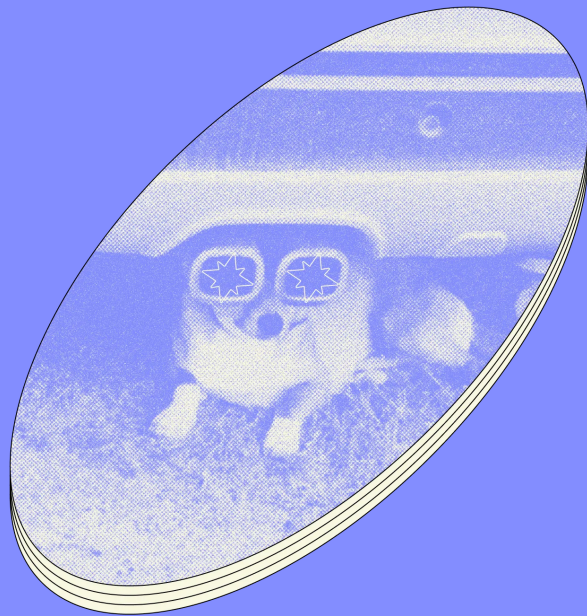
New Business Tools for Agencies: A Strategic Guide
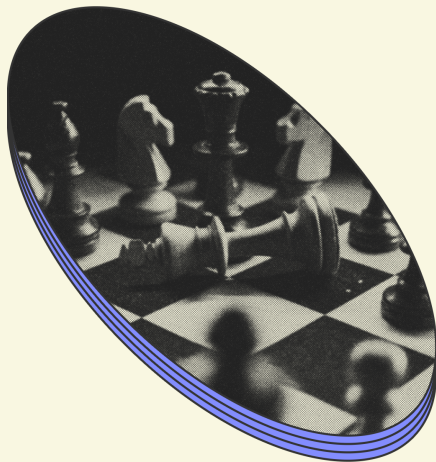
The End of New Business As Usual

Agency new business has fundamentally changed. The days of relying primarily on large retainer engagements have given way to a more dynamic, project-based environment. While this evolution presents clear challenges, it also creates unprecedented opportunities for agencies willing to adapt their approach to growth.

Today's market is characterized by lower barriers to entry and expanding opportunities beyond traditional pitch processes. However, this democratization of opportunity comes with its own set of demands.
Agencies can no longer wait for opportunities to cross their desk—success requires a proactive approach to business development that many organizations aren't equipped to execute.

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This Shift Manifests in Several Key Ways

1. **From Reactive to Proactive**. The traditional model of responding to inbound RFPs and pitch invitations, while still important, is no longer sufficient for sustainable growth. Agencies must now create their own opportunities through strategic outreach, thought leadership, and relationship building—this requires a fundamental shift in how we think about and resource new business efforts.

2. **From Isolated Tools to Integrated Systems.** As the complexity of business development increases, the tools and systems we use must evolve accordingly. Spreadsheets and disconnected point solutions create inefficiencies and missed opportunities, as success demands an integrated approach that aligns your tools with your strategy while maximizing return on effort.

4. **From Random Acts of New Business to Strategic Growth.** The proliferation of opportunities and channels has created unprecedented noise in the market. Without a systematic approach to evaluation and pursuit, agencies risk going after opportunities that don't align with their strategic goals and spreading their resources too thin.

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The Opportunity in Change

These changes create real opportunities for agencies ready to evolve:

- The project-based economy allows agencies to prove their value through focused engagements before expanding relationships

- Reduced barriers to entry mean smaller agencies can compete more effectively against larger networks

- Digital tools and automation can give smaller teams equal footing, allowing lean teams to punch above their weight

- More flexible engagement models create opportunities for specialization and strategic partnerships

The key to capitalizing on these opportunities lies in developing systems and processes that allow agencies to operate efficiently while maintaining the flexibility to adapt to changing market conditions. This requires a thoughtful approach to selecting and implementing the right tools—tools that enhance rather than complicate your new business efforts.

In the following pages, we'll explore how agencies can build a cohesive new business system that drives growth while reducing the administrative burden on their teams. We'll examine specific tools and approaches that align with the way agencies actually work, rather than forcing them to adapt to systems designed for different types of organizations.

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A Philosophy Around Tools

The tools we use shape the way we work. In the context of agency new business, this means selecting and implementing tools that enhance our natural workflows rather than forcing us to adapt to rigid systems. Our philosophy around tools is built on four core principles:

1. **Use the Right Tool for the Right Job.** Agencies often default to using oversized, complex systems designed for large sales organizations, or trying to adapt project management tools to serve new business needs. Neither approach is optimal. The right tool should match both the scale and specific needs of agency new business development—supporting rather than complicating your processes.

2. **Build Smart Automations to Minimize Manual Work.** New business leaders are already stretched thin. Every minute spent on manual data entry or administrative tasks is a minute not spent on strategic relationship building. Smart automation isn't about replacing human judgment—it's about freeing up time for the high-value activities that actually drive growth.
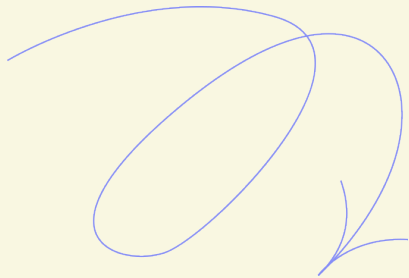
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A Philosophy Around Tools

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3. **Ensure a Single Source of Truth.** Information scattered across multiple systems creates confusion and missed opportunities. By integrating your tools and establishing a single source of truth, you ensure that everyone in the organization is working from the same playbook. This is particularly crucial for agencies, where opportunities often require rapid response and cross-functional collaboration.

4. **Make Information Accessible Where Work Gets Done.** The best system in the world is useless if people don't use it. Tools should integrate into existing workflows, making relevant information available when and where it's needed. This means thinking carefully about how different stakeholders interact with your new business system and ensuring they can access what they need without unnecessary complexity.
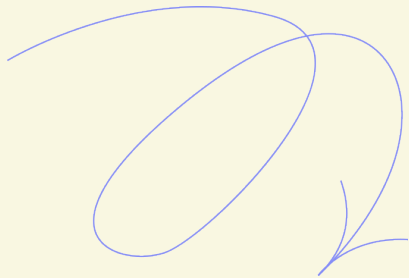
Who Is This Guide For

This guide is designed for agencies that typically have a single lead managing new business tools, supported by multiple stakeholders across the organization. Unlike traditional sales organizations, agencies rarely have separate marketing and sales functions, requiring tools that can support a more integrated approach to business development.

It's important to note that this guide is not about:

- Project management tools or systems

- Client service workflows

- General CRM implementation

Instead, we focus specifically on the tools and systems needed to bring new business into your agency. While improvements in your new business system may positively influence other areas of your organization, our primary concern is supporting efficient, effective business development.

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10 Ways a Cohesive New Business System Drives Agency Growth

1. **Making Client History Actionable**
Your past work defines your future opportunities. Yet crucial client data often sits dormant across spreadsheets, old RFI responses, and in the memory of agency leadership. A unified system transforms this scattered information into actionable insights, helping you spot patterns in your success and identify where you have the strongest chance to win new business.

2. **Pipeline Management That Works**
Regular pipeline updates shouldn't require heroic spreadsheet efforts or lengthy email chains. Modern new business systems automate reporting while connecting current opportunities to historical data. This gives agency leaders clear visibility into progress while saving new business teams hours of manual work each week.

3. **Unlocking Internal Expertise**
Your team's collective experience is your secret weapon. Beyond tracking agency case studies, your system should map individual team members' category experience and client relationships. This helps you quickly identify who has relevant expertise for new opportunities—including staff who've worked directly with target clients.

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10 Ways a Cohesive New Business System Drives Agency Growth

4. Strategic Prospect Identification
Success comes from pursuing the right opportunities, not just any opportunities. By connecting your client history, staff expertise, and strategic goals within a single system, you can build targeted prospect lists that align with your agency's strengths and growth objectives. Clear category taxonomy helps you spot patterns and identify promising sectors for expansion.

5. Content Distribution with Purpose
Agencies invest heavily in thought leadership, research, and case studies. Your new business system should help you extract maximum value from this content by connecting it to relevant prospects and tracking engagement. This turns your content from a cost center into a strategic asset that drives meaningful conversations.

6. Productized Service Management
The industry's shift from open-ended retainers to defined product offerings demands new selling approaches. A well-designed system helps you package, price, and cross-sell services more effectively. This systematic approach improves both win rates and profitability.

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10 Ways a Cohesive New Business System Drives Agency Growth

7. **Real-Time Internal Communication**
Agency teams move fast. Static reports and scheduled updates quickly become outdated. Modern systems provide customized dashboards and automated alerts, ensuring everyone has access to current information when they need it. This keeps teams aligned without endless update meetings.

8. **Relationship Management That Builds Value**
Existing relationships often hold the key to future growth. Your system should help you track not just current clients, but also alumni who've moved to new organizations and important industry contacts. Systematic relationship tracking ensures valuable connections don't slip through the cracks.

9. **Partnership Network Activation**
As clients increasingly seek specialized expertise, strategic partnerships become crucial for growth. Your new business system should map your network of complementary partners and track referral agreements. This helps you quickly assemble the right capabilities for each opportunity while managing partnership obligations.

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10 Ways a Cohesive New Business System Drives Agency Growth

10. **Dynamic Talent Network Management**
Project-based work requires flexible access to specialized talent. Your new business system should help you maintain an active network of freelancers and strategic partners, tracking their expertise, availability, and past performance. This allows you to quickly scale capabilities to match opportunity requirements.

While each of these benefits is valuable independently, the real power comes from their integration. A cohesive system creates connections between data points, surfaces insights that would otherwise remain hidden, and automates routine tasks that drain team energy. This systematic approach gives agencies the foundation they need to pursue growth proactively rather than reactively.

Evaluating New Business Tools: A Framework for Agencies

When evaluating tools for your agency's new business system, five key criteria determine long-term success. This framework helps you look beyond feature lists to assess how each tool will actually function within your agency.
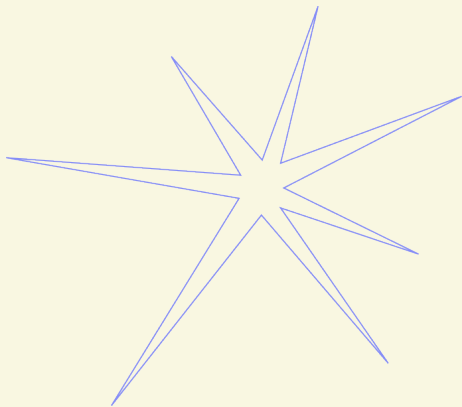
1. **Price Structure & Total Cost**

Cost efficiency matters more than ever as agencies build their tech stacks. We prioritize:

- Lightweight, focused solutions over expensive all-in-one platforms

- Tools that scale reasonably with usage

- Transparent pricing without hidden fees

- Value for actual features used versus paying for unused capabilities

Our recommendations focus purely on value delivered—we maintain no financial relationships with any tools we evaluate.

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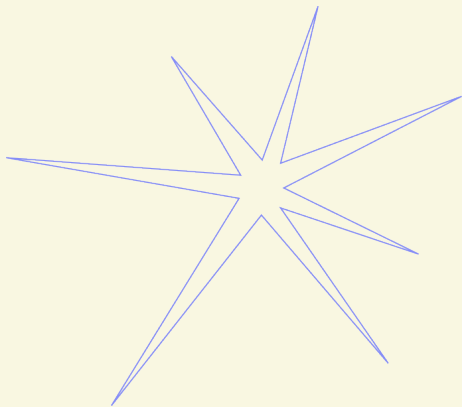# Evaluating New Business Tools: A Framework for Agencies

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2. Integration Capabilities

A tool is only as valuable as its ability to connect with your other systems. We evaluate:
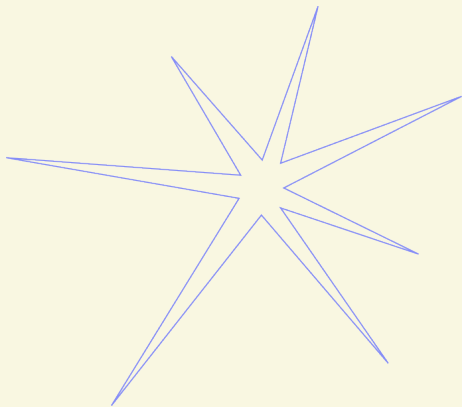
- Number and quality of native integrations

- Reliability of existing integrations

- API accessibility and documentation

- Integration costs and limitations

Native integrations typically provide the most reliable and maintainable connections. Tools like HubSpot offer hundreds of native integrations, while newer platforms like Folk may have a more limited but growing integration set.

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3. Ecosystem Openness

Your tool's ecosystem approach directly impacts how your team can access and use data. We assess:

- Ability to share data with non-licensed users

- Options for custom access levels

- Data export capabilities

- Cost implications of wider access

Open ecosystems like Airtable let you selectively share data and functionality without requiring full licenses for every user. Closed systems like AgileCRM require seat licenses for any data access, increasing total cost as your needs grow.

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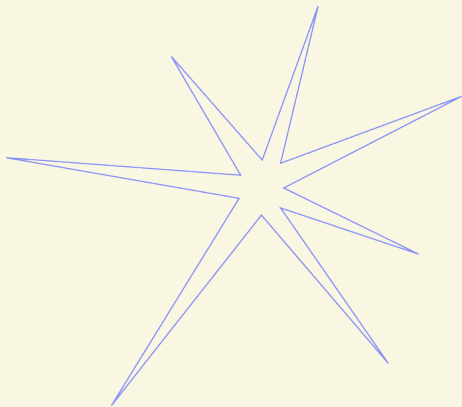
4. User Experience & Adoption

The best features mean nothing if your team won't use them. Our evaluation combines:

- Published user reviews from G2 and Capterra

- Direct testing experience

- Setup and training requirements

- Interface clarity and consistency plus mobile accessibility

We pay special attention to features that drive or hinder adoption based on real agency usage patterns.

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5. **Feature Set Analysis**

Basic Features. Most tools start with these fundamental capabilities:

- Contact Management: Storing and organizing contact information

- Company Management: Tracking organizations and their details

- Deal Management: Basic pipeline and opportunity tracking

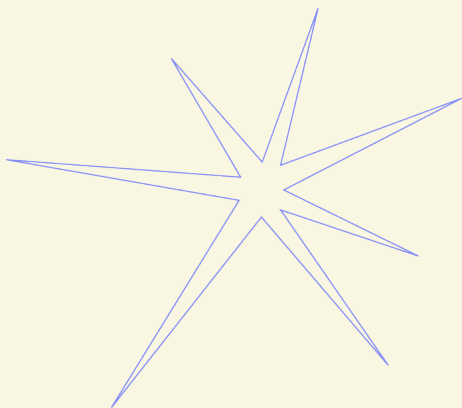- Product Management: Managing your service offerings

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5. **Feature Set Analysis**

Advanced Capabilities. We evaluate availability and implementation of:

- Mobile Access: Real native apps versus mobile web

- Marketing Automation: Email, content, and campaign tools

- Data Enrichment: Automatic profile enhancement

- Forms & Data Capture: Input methods and flexibility

- Customization: Fields, workflows, and processes

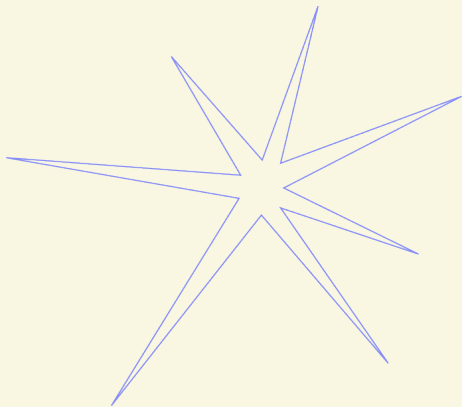- Knowledge Base: Internal documentation and resource management

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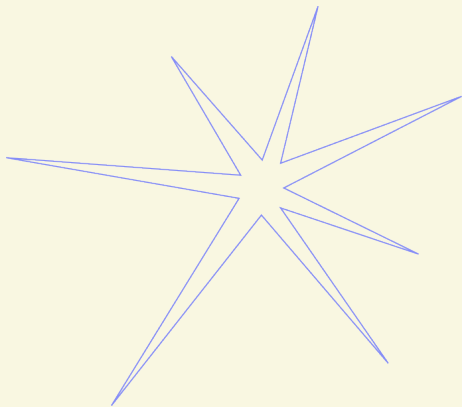
5.   **Feature Set Analysis**

Critical Integrations. Success requires smooth connection with:

- Email Platforms: Gmail, Outlook, etc.

- Calendar Systems: Scheduling and availability

- Prospecting Tools: LinkedIn Sales Navigator, etc.

- Financial Systems: Workamajig, QuickBooks, etc.

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Evaluating New Business Tools: A Framework for Agencies

Building Your System

Each agency's needs are unique, but these criteria provide a structured way to evaluate options. The process typically involves:

1. Prioritizing your must-have features

2. Identifying deal-breaker limitations

3. Testing critical integrations before committing

4. Starting small and scaling up as needed

Remember that perfect tools don't exist—success comes from finding the right combination of tools and connecting them effectively. Sail helps agencies not only select the right tools but also design and implement custom systems that integrate seamlessly with existing processes. Our experience across multiple agencies and tools enables us to create efficient, cost-effective solutions that build on what's already working while solving for current gaps and future needs.

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Finding the Right Tools for Creative Agencies
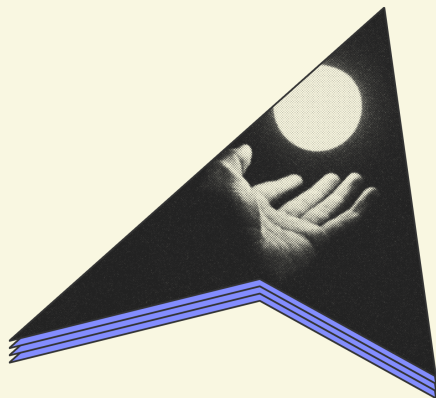
Our goal was clear: identify the best tools that truly deliver value for creative agencies. The reality is that many platforms are designed for traditional sales organizations or large marketing structures, not agencies, and that becomes painfully obvious in practice. Some charge a base price of over $500 per month—before adding integrations. Others only become viable at price points exceeding $700 per month.

To find the best solutions, we evaluated both well-known platforms and smaller, specialized providers. We went beyond traditional CRMs, exploring tools that excelled in other critical areas. Airtable stood out for its strength in integration and knowledge management, while Lemlist and La Growth Machine showed their value through sophisticated prospect engagement capabilities.

In the following pages, we'll examine our key findings and standouts, with comprehensive platform analyses available in the appendix.

DIGITAL TOOLS FOR AGENCY NEW BUSINESS – REPORT

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We Explored the Best Options for Agencies

HubSpot

pipedrive

insightly
an Unbounce company

Constant Contact

Notion

salesforce

monday CRM

folk.

La Growth Machine

Google Sheets

Zoho CRM

AgileCRM

copper

lemlist

Airtable

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The Tools that Excelled Across the Key Criteria

HubSpot is one of the most versatile tools on the market, offering robust functionality within an affordable price range. It provides an intuitive way to manage contacts, companies, deals, and products. For example, each contact record gives you quick access to all recent interactions—from emails and scheduled meetings to tasks, notes, and engagement history—ensuring all relevant information is at your fingertips.

HubSpot also integrates with a wide range of specialized tools, from automated outreach platforms to knowledge management systems. It syncs seamlessly with popular email and calendar apps like Gmail and Outlook and supports over 100 integrations, many of which are native. For agencies looking for a CRM that can serve as the backbone of their new business system, HubSpot is a strong contender.

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The Tools that Excelled Across the Key Criteria

Airtable

Airtable is a powerful knowledge management solution that makes it easy to organize and access critical information. When paired with a CRM like HubSpot, it unlocks countless possibilities by bridging gaps between data points, enabling simple no-code automations, and creating tailored, shareable views. It's one of the most customizable and open tools available.

La Growth Machine

La Growth Machine is a specialized tool for automated, multi-channel outreach at scale. While it comes at a higher monthly cost, its flexible pricing model allows you to activate or pause it as needed, making it a practical choice for agencies with fluctuating outreach needs.

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The Tools that Excelled Across the Key Criteria

folk.

Folk is an intuitive CRM that provides a smooth user experience and essential integrations with email clients and prospecting tools. It's an excellent choice for agencies looking for a straightforward, accessible CRM to get started.

N

Notion is a highly configurable platform ideal for internal wikis, project management, and more. With its low per-user monthly fee, it serves as an accessible front-end tool for the entire agency. It also supports embedded widgets—integrating views and data from other apps—ensuring everyone stays up to date on new business processes.

For the complete breakdown of all tools, see appendix.

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Your Partners for New Business Growth

ALEX ELEY
FOUNDER

ALEX@SAIL.CONSULTING

LINKEDIN.COM/IN/ALEXELEY/

WWW.SAIL.CONSULTING/

We believe tools are an extension of your overall strategy, bridging the gap between big-picture thinking and tactical solutions. However, most off-the-shelf options aren't built with agencies in mind, which is why we've spent thousands of hours refining an approach with a single focus—driving new business for creative agencies. We've done the hard work, so you don't have to. Our vision for healthy agency growth goes beyond systems—it encompasses strategy and operations as well. We've developed solutions that address every aspect, from defining an agency's "right to win" and building a connected growth strategy to setting up a seamless new business system—the theme covered in this report.

Interested in setting up your new business system or learning more about our comprehensive solutions? Please get in touch with me to schedule a quick demo session.

We hope you've found our insights valuable!

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	PRICE	INTEGRATIONS	OPEN/CLOSED	EASE OF USE	FEATURES
HubSpot	**$15** /USER/MO	114	ALLOWS FREE HUBSPOT USERS TO ACCESS THE ACCOUNT IN READ-ONLY MODE	4.5/5	9/14
salesforce	**$25** /USER/MO	2	CLOSED	4.3/5	8/14
Zoho CRM	**$14** /USER/MO	5*	CLOSED	4.2/5	7/14

*OUT OF A TOTAL OF 50+ INTEGRATIONS, 5 ARE AVAILABLE THROUGH THE STANDARD PLAN.

DIGITAL TOOLS FOR AGENCY NEW BUSINESS – REPORT

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	PRICE	INTEGRATIONS	OPEN/CLOSED	EASE OF USE	FEATURES
pipedrive	$14 /USER/MO	400	LETS YOU SHARE LIVE DASHBOARDS WITH ANYONE OUTSIDE OF PIPEDRIVE	4.4/5	9/14
monday CRM	$51 /3 USERS/MO	150	PROVIDES VIEWERS WITH READ-ONLY ACCESS TO THE ACCOUNT	4.7/5	9/14
AgileCRM	$10 /USER/MO	3	CLOSED	4.0/5	11/14

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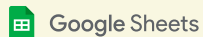|	PRICE	INTEGRATIONS	OPEN/CLOSED	EASE OF USE	FEATURES
insightly *an Unbounce company*	$29 /USER/MO	5	CLOSED	4.1/5	8/14
folk.	$20 /USER/MO	15	ALLOWS SHARING A PUBLIC VIEW OF CONTACTS IN VARIOUS FORMATS	4.6/5	8/14
:copper	$9 /USER/MO	6	CLOSED	4.5/5	6/14

DIGITAL TOOLS FOR AGENCY NEW BUSINESS – REPORT

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	PRICE	INTEGRATIONS	OPEN/CLOSED	EASE OF USE	FEATURES
Constant Contact	$528 /MO	3	ALLOWS UP TO 50 USERS WITH VARIOUS PERMISSION LEVELS	4.3/5	5/14
Google Sheets	$6 /USER/MO	8	LETS YOU SHARE A PUBLIC VIEW	4.6/5	6/14
Airtable	$20 /USER/MO	32	ALLOWS YOU TO SHARE READ-ONLY VIEWS	4.5/5	7/14

DIGITAL TOOLS FOR AGENCY NEW BUSINESS – REPORT

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	PRICE	INTEGRATIONS	OPEN/CLOSED	EASE OF USE	FEATURES
Notion	$10 /USER/MO	104	ALLOWS YOU TO INVITE EXTERNAL COLLABORATORS TO YOUR ACCOUNT	4.5/5	7/14
Nuclino	$6 /USER/MO	56	ALLOWS YOU TO SHARE PUBLIC VIEWS	4.8/5	7/14
La Growth Machine	$60 /IDENTITY*/MO	7	LETS YOU ADD TEAM MEMBERS AS GUESTS	4.7/5	4/14

*THIS REFERS TO THE IDENTITY PRESENTED TO PROSPECTS, SUCH AS IN EMAILS AND ON LINKEDIN.

DIGITAL TOOLS FOR AGENCY NEW BUSINESS – REPORT

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PRICE	INTEGRATIONS	OPEN/CLOSED	EASE OF USE	FEATURES
$79 /USER/MO	44	OFFERS READ-ONLY ACCESS OPTIONS FOR TEAM MEMBERS	4.5/5	5/14

lemlist

DIGITAL TOOLS FOR AGENCY NEW BUSINESS – REPORT

Legend

Price: Cost of the selected plan per user, per month. For Constant Contact, the pricing is simply per month, as they don't charge based on the number of users. For Monday CRM, the price is listed as 'per 3 users per month' since they require a minimum purchase of three licenses.

Integrations: Number of native (or easy-to-set-up) integrations available for the selected plan.

Ease of use: A combination of published user reviews and personal experience, rated on a scale of 1 to 5, with 5 being the best.

Features: Number of features offered by the selected plan out of the 14 we evaluated: contact, company, deal, and product management; mobile friendliness; marketing automation; data enrichment; form capabilities; custom objects; wiki functionality; and integrations with email clients, calendar solutions, prospecting tools, and finance tools.

Plans reviewed: HubSpot Operations Hub Starter, Salesforce Starter Suite for Small Businesses, Zoho CRM Standard, Pipedrive Essential, Monday CRM Standard, Agile CRM Starter, Insightly Plus, Folk Standard, Copper Starter, Constant Contact Starter, Google Workplace Business Starter, Airtable Team, Notion Plus, Nuclino Starter, La Growth Machine Basic, Lemlist Multichannel Expert.

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