

THE UGC PLAYBOOK

FOR CREATORS

Brand CRM Pitch Tracker

Turn delivery into renewals, referrals, and repeat work.

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BRAND CRM PITCH TRACKER — ACCESS & QUICK START

Brand CRM Pitch Tracker — Access & Quick Start

Access your tracker:  [Pitch Tracker](#)

How to open it (free Notion works)

1. Click the link.
2. Top-right Duplicate (mobile: ... ➔ Duplicate).
3. Choose your workspace (the free plan is fine).
4. You now have your own editable copy. The master is view-only.

If you see “No access,” you’re on a linked view. Open the link in a browser, sign in, and click Duplicate.

What's inside (columns you'll use)

- Brand Name – the company you're pitching.
- Contact Name & Email – person + best email/DM handle.
- Campaign Name – working title (e.g., Spring Skincare Ads).
- Stage – your pipeline status (see below).
- Pitch Link – Google Doc/Deck/Drive folder.
- Follow-up Date – when you'll nudge next.
- Status – Active or Closed.
- Notes – decisions, objections, budget hints.

Pipeline stages (use these)

Lead → Pitched → In Talks → Approved → Paid

(If it fizzles: Ghosted / Lost)

10-Minute Quick Start

1. Add 10 brands today (or import the 310-brand CSV, then paste in the 10 you'll pitch first).
2. Open your Done-For-You Pitch Templates → send 10 pitches now.
3. Set Follow-up Date for Day 3 and Day 7.
4. Move the Stage as things progress.
5. Paste your deck/Google Doc in Pitch Link to keep everything in one place.

Follow-up cadence (copy/paste into Notion)

- Day 3 – Gentle nudge: “Just floating this to the top of your inbox—keen to hear your thoughts.”
- Day 7 – Value add: “Sharing 1 quick content idea tailored to [Brand]: [1-line concept].”
- Day 21 – Close loop: “I’ll close the loop here—if useful later, my portfolio’s here: [link].”

Templates for these are in your Follow-Up Scripts section of the bundle.

Views you’ll find helpful

- Show All – full table (default).
- Active Only – filter Status = Active.
- Needs Follow-up Today – filter Follow-up Date is today or before.
- Won / Paid – your wins for invoicing.

Tip: On desktop, press cmd/ctrl + P to search any brand instantly.

Connect it to your contacts (optional power-up)

If you imported UGC Contacts 310 as a separate database:

1. In Pitch Tracker, add a Relation property → link to UGC Contacts 310.
2. Select the brand row to auto-pull email/notes via Rollups (optional).
3. Keep pitching in the tracker; update the contact data in UGC Contacts 310.

Common fixes

- “No access” screen? Duplicate the public page first; don’t open a linked view.
- Can’t see Duplicate? Open in Safari/Chrome (not the in-app browser), sign in, refresh.
- Prefer Sheets? Use the CSV backup link above.

Mini outreach challenge (7 days)

- Day 1–5: 10 pitches/day (50 total).
- Day 6: Follow-up #1 for Days 1–3.
- Day 7: Follow-up #1 for Days 4–5; schedule Follow-up #2 next week.
- Expect replies within 7–14 days when you stay consistent.

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PITCH TRACKER NOTION

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