



BE  BUSINESS

CRM Basics

Idea & Implementation

Workbook

Which CRM Tool Should You Be Using?

1. How many leads does your business generate per month?

- 0 1-10 10-25 25-100

2. Does your business have a sales team?

- I'm it! We should. Yes, a few. Salesforce is more like it!

3. How well do you know your target market segments?

- I don't know. Working on it. Very well. We have defined avatars.

4. Do you have an established sales process?

- No. Yes, but its not followed often. Yes. Yes, and it's well documented.

5. Are you willing to spend money on a sales tool like a CRM?

- No. Maybe a little. Yes. Whatever it takes.

6. Do you have a few hours a week for the next 60-90 days to invest in learning, developing and honing a new lead, sales, and follow-up system?

- No. No, but I do have some time. Yes. No, but I am willing to hire someone to do it.

If your answers are primarily in the first column, it is recommended you start simple, use your phone/Google contacts and a spreadsheet.

If your answers are primarily in the second column, you are a good candidate for applying a multi pronged approach that incorporates a simple crm tool or spreadsheet with a professional email marketing software such as Constant Contact.

If your answers are in the third column, then you're ready to graduate to a product such as Keap.

If your answers are in the fourth column, it's time to examine working with a consultant or agency and a more advanced product such as Infusionsoft.

<h1>What can you automate?</h1> <p>Goal: <i>To make as many repetitive tasks automated as possible.</i></p>	Now	Later	Not Applicable
Leads & Prospects			
Introduction Email			
Setting a Phone or In Person Appointment/Meeting			
Info Requests from Your Website			
Event Registration & Promotion			
Assigning Inbound Leads to an Agent			
Nurture Drip Campaigns after First Contact to Lead			
Networking			
Conference Follow-up			
Lead Magnet (Free content for contact info)			
Sales Pipeline Drip Campaigns (Lead to Sale plus Follow-up)			
Sales & Service			
Invoicing			
New Client Welcome			
Referral Requests			
Review Requests			
Customer Service After Sale (How-to, Getting the most, etc)			
Abandoned Cart			
Failed Billing Charges			
Help Requests			
Appointment Reminders			
Satisfaction Surveys			
Clean up your Email Database			
Gain Social Followers			
Document Delivery			

CRM & Sales Flow

GATHERING LEADS

How does your target customer find you?

Where do you get leads from?

Once you have a lead, how do you store their information?

What is the size of your contact list and how often are you contacting them via email?

In the future: Identify lead magnets – free reports and papers, free gifts, etc. that focus on away language that can be used to capture lead information and trigger followup.

ENGAGING

How many leads (of this target customer) are you generating per month?

How many close quickly?

What, if anything, do you offer potential customers before they buy – such a consultation, free quote, free gift or report, etc?

In the future: Identify gaps and opportunities in the current follow-up process – is there a “free” offer to measure engagement? Are they asking for the sale immediately (versus progressive follow-up)? Initial communication should build value and trust and good follow-up should eventually build up to 7-9 touchpoints.

SELLING

How do your customers pay for your core product offering?

What much income is generated by this core product offering?

What were last year’s revenues?

In the future: Identify sales automation opportunities and quote tracking. E-commerce for one-time and recurring payments and upsells

DELIVER & WOW

What, if anything, can you upsell when selling this core product?

How do you generate referrals from your current customer base?

How do you know if your paying customers are satisfied? How do you know how to improve?

How do you stay in touch with your customers after they pay you?

In the future: Ask for referrals and incentivize happy customers to generate new business. Ask customers for feedback to continually improve your product and processes. Give customers the opportunity to enhance the sale via upsells, upgrades, and the ability to buy again easily.

Complete this table for EACH TARGET MARKET SECTOR!

	Gather Leads	Engage	Sell	Deliver & Wow
Current				

	Gather Leads	Engage	Sell	Deliver & Wow
Future				

My CRM Roadmap



Primary Goal

Fifth Step:



4

5

Fourth Step:

Second Step:



2



3

Third Step:



1



Ultimate Goal

First Step:
