
Master Program
Training Module
The importance of using a CRM in your Business
www.nathaliegarson.com

What is a CRM?

Definition:

A Customer relationship management (CRM) allows a company to manage and analyse its own interactions with its past, current and potential customers.

When people talk about CRM, they are usually referring to a CRM system, a tool that helps with contact management, sales management, productivity, and more.

For us Small Business Owners

For SBO, a CRM is a tool, a system that helps us to do the following:

- Have a place to store our leads
- Access to lists of our contacts to send mailings
- Follow up on prospects
- Follow up on proposals
- Keep track on the information on clients

CRM is a place to keep leads

=> What is a lead? A lead is a person that agreed to give us their contact details to be recontacted

=> We know that our biggest asset in our Business is our leads

=> Each lead is a potential Prospect, which is a potential Client

=> All the marketing activities that we do (lead generation, networking, social media…) are only useful if you have a place to save the contact details of our leads

A way to access your lists of contacts

Once you have a list of leads (contacts), the goal is to nurture the relationship and to multiply the contact points so that we build a contact with people who can be our potential clients

Mailing is one of the way you can keep in touch with your leads and offer value, share content, show them what this relationship with you can bring them

Depending on the tool that you use as a CRM, you can either

- Use the CRM to store the emails and use the list to send the mailing from another tool
- Use the CRM tool to store the emails and send the mailings

A way to follow up on prospects

Once you have a place where your leads are listed as soon as you meet them or are in contact with them, you want a place where you can track the relationship

Here are informations that can be useful

- Where you found your lead (Lead Source)
- Who are they (Gender, age, place they live…)
- What were your contact points
- Free comments on anything that you know on this prospects that can help you help them
- Other information, depending on your business

A way to follow up on proposals

Once your prospects have gone through your Sales Process, they have received an offer from you (with a money offer)

The best way to make sure that your Sales Process will convert a Prospect into a Client is the FOLLOW UP

The CRM tool that you will use will help you follow up with your open Proposals and will give you an idea of how much you have in your Pipeline

A way to keep information on existing clients

Your CRM tool is also the best place to have all your clients' information in one place so you can improve your Customer Service

Some information that are interesting to have in your CRM

- What product they bought
- What price they paid
- The invoices
- The life cycle of their journey with you as a client with the milestones

When should you start using a CRM

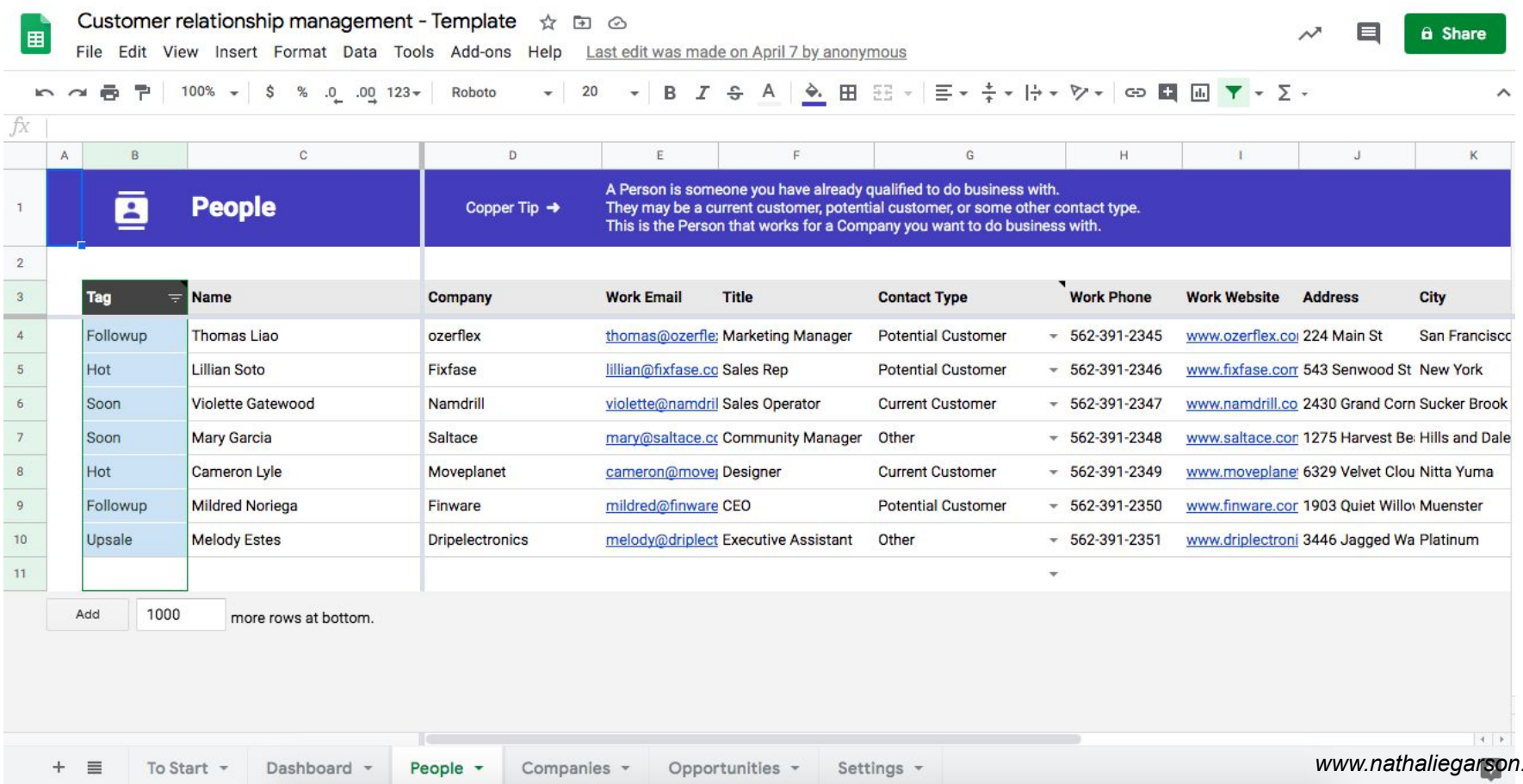
You need to keep track of your leads/prospects/clients as soon as you open your business.

But you don’t need to use a CRM tool, you can use any table, or excel spreadsheet to keep track of all the people that you are going to be in contact with you in your Business.

In the beginning, identify the information that you need to track at each level and to create column/fields in your excel table. You will always be able to export this information into a CRM tool when you are ready to move on to the next stage

What to use before the CRM

Nathalie Garson



Customer relationship management - Template

File Edit View Insert Format Data Tools Add-ons Help Last edit was made on April 7 by anonymous

Share

People

Copper Tip → A Person is someone you have already qualified to do business with. They may be a current customer, potential customer, or some other contact type. This is the Person that works for a Company you want to do business with.

Tag	Name	Company	Work Email	Title	Contact Type	Work Phone	Work Website	Address	City
Followup	Thomas Liao	ozerflex	thomas@ozerfle:	Marketing Manager	Potential Customer	562-391-2345	www.ozerflex.co	224 Main St	San Francisco
Hot	Lillian Soto	Fixfase	lillian@fixfase.co	Sales Rep	Potential Customer	562-391-2346	www.fixfase.com	543 Senwood St	New York
Soon	Violette Gatewood	Namdrill	violette@namdril	Sales Operator	Current Customer	562-391-2347	www.namdrill.co	2430 Grand Corn	Sucker Brook
Soon	Mary Garcia	Saltace	mary@saltace.c	Community Manager	Other	562-391-2348	www.saltace.com	1275 Harvest Be	Hills and Dale
Hot	Cameron Lyle	Moveplanet	cameron@move	Designer	Current Customer	562-391-2349	www.moveplane	6329 Velvet Clou	Nitta Yuma
Followup	Mildred Noriega	Finware	mildred@finware	CEO	Potential Customer	562-391-2350	www.finware.cor	1903 Quiet Willo	Muenster
Upsale	Melody Estes	Dripelectronics	melody@driplect	Executive Assistant	Other	562-391-2351	www.driplectroni	3446 Jagged Wa	Platinum

Add 1000 more rows at bottom.

To Start | Dashboard | People | Companies | Opportunities | Settings

When is the right time to move to a CRM tool

=> Once you grow your business, and you have more and more leads/prospects/proposals/clients and it is hard to keep track of manually

=> When you want to sort the type of contacts you have to connect with them differently - you want to qualify your lists according to specific criterias such as - Gender, language, city they live, stage they are in etc…

=> When you hire people to work with you in the business and you all need to have access to the same information and update the information in the same place

What are the fields that are important in a CRM

Nathalie Garson

First & Last Name

Email Address

Phone Number

Location (Country, City)

Language

Birthday

Description of Business/ Activity

Social media link

Lead Source

Lead Status

- Lead
- Prospect
- Proposal
- Client

Funnel Stage

What Service they are interested in

Last Contact Date

Comments

What are the fields that are important in a CRM for clients

Nathalie Garson

- First & Last Name
- Email Address
- Phone Number
- Location (Country, City)
- Language
- Birthday
- Description of Business/ Activity
- Social media link
- Lead Status - Client
- What Product/Service they bought
- Contract
- Invoices
- Payments details
- Start date
- Ending date
- Service Delivery

How to choose a CRM?

Before you start evaluating CRM tool, ask yourself these questions:

1. *How can it improve the Lead Generation and sales process?*
2. *Who in our company is going to use CRM? How many users do we need?*
3. *What other software do we want to integrate with a CRM system?*
4. *What is our budget?*
5. *Do we need a mailing tool integrated or separated from the CRM*
6. *Be clear what is the first process that you want to optimise in your business*
    a. *Lead Generation*
    b. *Lead Nurturing*
    c. *Proposal*
    d. *Sales*

What features should you look for in CRM software?

- Contact management
- Lead management and sales
- E-commerce
- Reports/dashboards
- Workflow automation
- Mobile version
- Integration with other tools

Zoho

Zoho CRM targets small businesses. It is categorized as Sales Performance Management tool

Pros

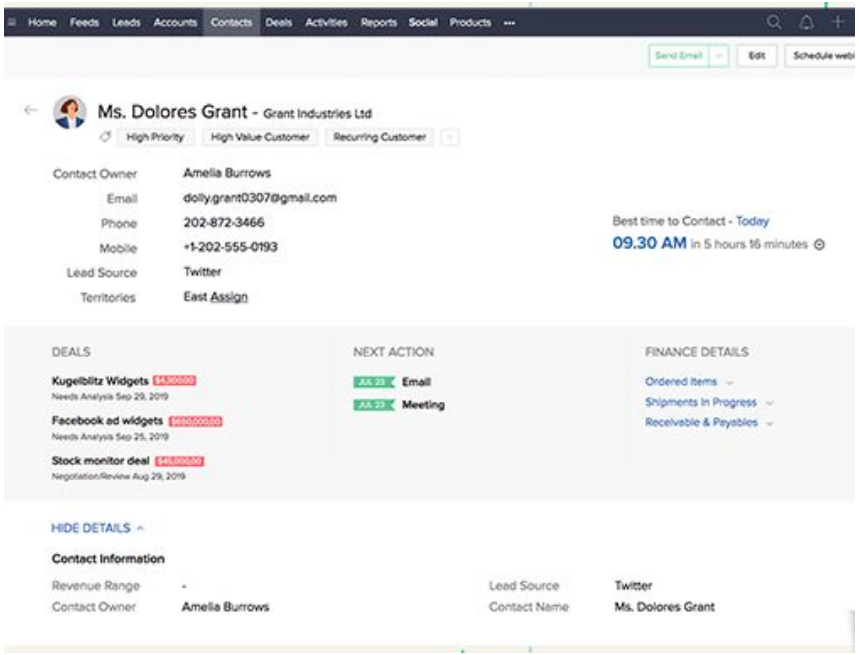
- Comprehensive reporting

Cons

- Requires a lot of customisation to get started, not intuitive
- Limited customer support
- Forms aren't optimised for conversions
- Sometimes buggy with larger contact lists

Pricing:

- Free - for up to 3 users
- Standard - $12 per user/per month, billed annually
- Enterprise - $35 per user/per month, billed annually

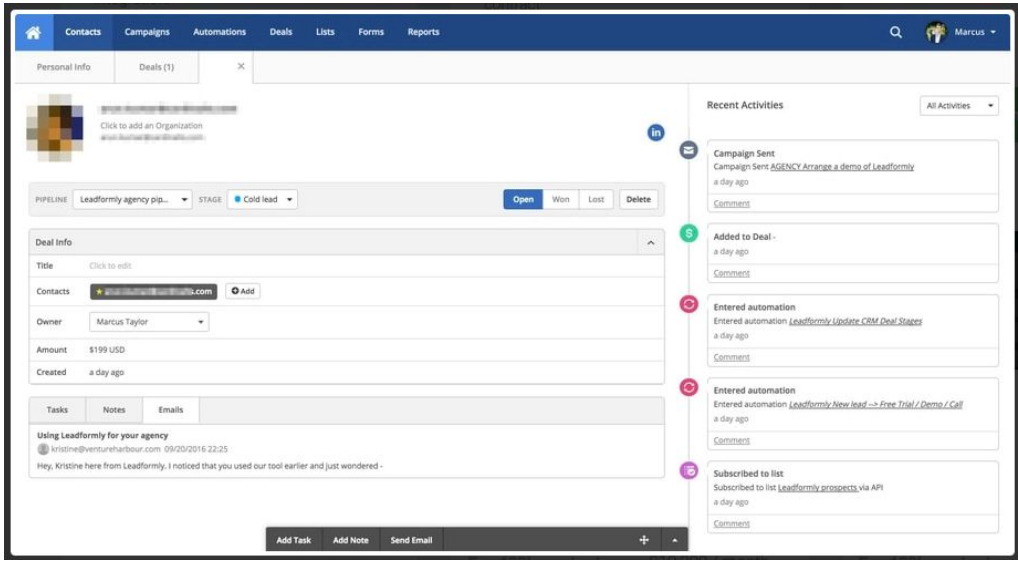


ActiveCampaign

ActiveCampaign

Nathalie Garson

ActiveCampaign is a marketing automation & sales CRM platform designed for small businesses on a budget. It is categorized as Marketing Automation tool.



Pros

- Easy to build powerful automated workflows
- Very affordable and no setup fees
- A/B testing automation sequences & campaigns

Cons

- Limited dashboard customization options
- No landing page builder

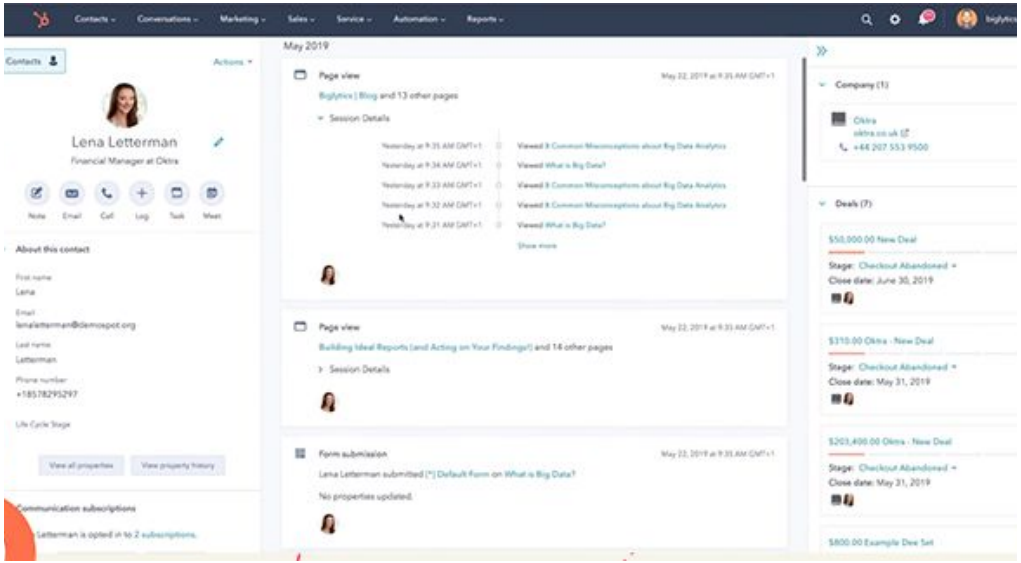
Pricing

- Lite - $9 Per Month - Paid Yearly
- Plus - $49 Per Month - Paid Yearly
- Professional - $129 Per Month - Paid Yearly
- Enterprise - $229 Per Month - Paid Yearly

Hubspot

HubSpot

Nathalie Garson



HubSpot offers a full platform of marketing, sales, customer service, and CRM software.

Pros

- Easy to use and intuitive platform
- It is a complete all in one solution

Cons

- Steep price creep, as you build your list, the cost of Hubspot rises steeply
- Marketing platform requires a 12-month contract
- Expensive for a small business solution

Pricing:

- Free HubSpot CRM - $0
- Sales Hub Starter - $50/month, includes 2 paid users
- Sales Hub Professional - $500/month, 5 paid users
- Sales Hub Enterprise - $1200/month, 10 paid users

Here are the tools that we have used

- Zoho - only a CRM
- Mailchimp - only a Mailing Tool
- Active Campaign - Mailing + CRM
- Ontraport - Mailing + CRM + Landing Pages + Invoicing + Membership Site platform

Do you have any Questions?