The CRM Checklist

The "Must-Haves"

There are three software pillars to systemising your business: your website and online social profiles, your accounting software (it's Xero, right?), and your CRM.

When you look at CRM, it should answer these four 'must haves'. Not doing so will see you managing an expensive mess of software services stuck together with digital sticky tape.

Notes: ______________________________

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1

Does it let me see my business' workflows?

Goal: A visual grid of who's where & what needs doing helps you stay on track.

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2

Can I manage my entire relationship with leads & contacts in the CRM?

Goal: Segment clients & leads by interest. Manage appointments, notes & tasks.

Notes: ____________________

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3

Is there a complete two-way integration with Xero?

Goal: Two-way sync of: sales, payments, organisations, contacts, tracking categories.

Notes: ____________________

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4

How do I implement it? How is support given?

Goal: UK-based online & telephone support. A proven implementation method.

Notes: ____________________

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The “Differentiators”

Whilst the four "Must-Haves" are critical to avoiding software chaos, some or all of these four "Differentiators" are ways to give a boost to your business success:

- engaging and warming-up the interest of prospects and clients;
- managing your own time better;
- making a professional impression to get paid what you're worth, and;
- getting paid in a timely manner to improve cash flow and profits.

Notes:

5

Does it do marketing automation follow ups?

Goal: Email marketing & follow-up automations unique to different contacts.

Notes:

6

Can I get appointments booked in my diary?

Goal: Leads able to book appointments at times you set your time to be available.

Notes:

7

Can I send proposals that show we're organised &

Goal: Being able to send impressive looking quotes / proposals simply & quickly.

Notes:

8

How does it help me get paid quickly & securely?

Goal: Being able to easily take payments via direct debit and card payments.

Notes: