

CRMs - What & Why

with *Kelby Williams & Business Station*

CRM = Customer Relationship Management software



DO I NEED A CRM?

What sort of relationship do you have with your customers?

*Do you have a multi-stage sales process?
(ie. Contact -> Pitch -> Quote -> Close)*

*Are you after the repeat
buying experience?*

*Do you have customers who
you want to sell to again?*

**A CRM WILL MAKE
YOUR LIFE EASIER**

*Do you want to keep track of
customer referrals?*

*Would you like to reach all of your
customers at once when it's time to
announce something new?*



WHAT CAN A CRM DO FOR ME?

Every CRM is different, but a good CRM can:

Keep all your data in one place

- Get info at a glance
- Integrate different systems (email marketing, sales, finances and more)

Track your sales process

- Keep track of all touch points with each client
- Identify where each client is in the sales journey
- Configure alerts for when to follow-up with clients

Manage your business emails

- Send from your business domain
- Send to all customers or segments of your mailing list
- Get email insights like Open Rates, Clicks & Unsubscribes

PLUS

- Minimise guesswork
- Automate repetitive processes
- Make data-driven decisions

TOP CRMS (ON A BUDGET)

*Click for more info**



Hubspot



Kelby's Favourite



Capsule



ClickUp

(CRM functionality)



Zoho CRM

**we don't receive anything in return for clicking the links but hopefully they're helpful!*