

## CRM Starter Guide

If you're new to sales or just starting your own business, you've probably been told a number of times you should be using a CRM. In this brief guide we'll explain the benefits of adopting this type of system as well as provide a few links where you can start using a zero or low cost CRM solution.

CRM stands for **Customer Relationship Management**. At its simplest, a CRM system allows businesses to manage business relationships and the data and information associated with them. If you prefer taking a non-pushy sales approach, relationship building is key to your success.

CRMs can store customer and prospect contact information, accounts, leads and sales opportunities in one central location, ideally in the cloud so the information is accessible by many, in real time. If the data is in the cloud, it's far safer than on a file on a laptop or a paper notebook for that matter.

For small businesses, a CRM system may simply help you enter your data in the cloud, making it accessible in real time, across any device. But as you grow, a CRM can quickly expand to include more sophisticated features to help teams collaborate with colleagues and customers, send customized emails, gather insights from social media conversations, and get a holistic picture of your business health in real time.

## Spreadsheet To Start

When first entering sales or starting a business, customer connections and information may be stored in a variety of ways. Some use old fashioned note cards and a Rolodex. Others store information on their mobile phone while on the go. Others use Excel spreadsheets or Google documents.

To make it easy I've created a spreadsheet for you to get started:

- Here is an example spreadsheet you can use to start using as a CRM. It's stored as a [Sales Babble CRM GoogleDoc](#).

If you're selling alone, these spreadsheets are a terrific way of getting started. However note if you look to grow your business quickly, these documents **will not scale**. Instead consider a CRM system to help you

collect your precious business data in one place, make it accessible via the cloud, and free up your time to focus on delighting customers rather than letting valuable insights and information fall through the cracks. It's critical that you remember to *follow up, follow up, follow up!*

## Free Cloud-based CRMs to Consider

Here are some free CRMs that you may find of value. These are systems I've used personally or come highly recommended by people I trust.

### HighRise

This system was developed by **37 Signals**, a company famous for its user friendly project management tool **BaseCamp**. It is a free app if you only have a few opportunities to manage.

<https://highrisehq.com/>

### Insightly

Basic CRM features including the ability to input, manage and track leads/sales. With basic reporting functionality and Project management and team collaboration tools.

<https://www.insightly.com/>

### VIPOR

This is a new product mentioned in Episode 35 (see [www.salesbabble.com/35](http://www.salesbabble.com/35))

It is a newly release, mobile centric free app created by Mike Muhney the inventor of ACT!

<http://viporbit.com/apps/>

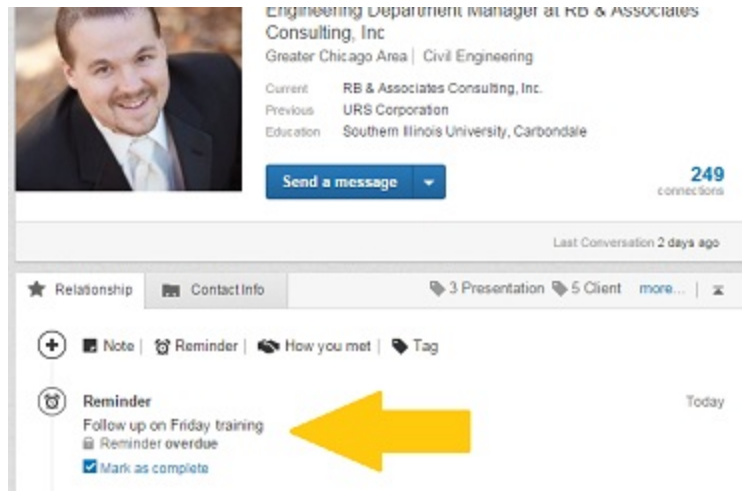
### Streak

There is a free plugin that works seamlessly with Gmail that is highly regarded you may find of value

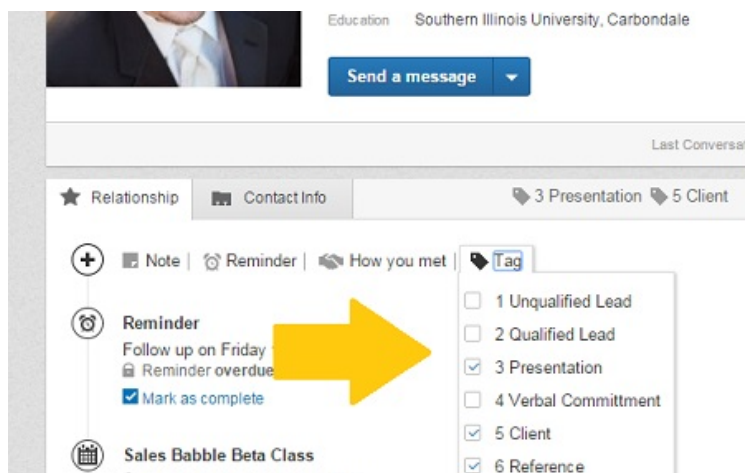
<https://www.streak.com/>

## LinkedIn

LinkedIn has the ability to store contact details and set reminders to follow up. Below is an example of using the Relationship and Contact Info data to document critical details.



LinkedIn also has the ability to set custom tags. I have tags for my sales stages and products preset in my LinkedIn account. Here is an example:



## Final Thoughts

Be it a spreadsheet, CRM app, or LinkedIn Relationship notes, investing energy into any kind of tool will pay off immediately. Find tools to help organize your day, aid in remembering to follow up, and build relationship connections. Soon you'll be able to focus solely on making appointments, sharing presentations and closing deals.