GET STARTED WITH YOUR

CRM REPORT

If you are looking for a system to organize your contacts, solidify a sales process, and automate some of your ongoing tasks then you need a CRM (customer relationship management) solution. This template provides you with the basics of a CRM. It's the perfect place to start if you aren't quite ready for a full-blown CRM with advanced features. This mini-CRM automatically saves changes so you will never lose data. To get started, just enter your contacts manually or copy and paste existing data into this sheet.

How to use this template

1. When setting up this mini-CRM for the first time, go to the "Settings" tab to define categories for characteristics such as Contact Type for People or Stage for Opportunities
2. Keep the CRM up-to-date by updating or adding rows as you engage with "People", "Companies", and "Opportunities"
3. Use the CRM to plan your daily, weekly, and monthly goals. The "Dashboard" provides a summary of how your sales pipeline is doing to help you decide what to address next.

Let's walk you through the tabs listed at the bottom of this sheet.

Dashboard

Think of the Dashboard tab as your control panel for your opportunities. You'll see the following information:

- The total value of all your opportunities
- Total number of People, Companies, and Opportunities in this CRM
- The number of Opportunities by stage and the value of Opportunities by stage

This is a great place to start planning your daily goals!

People

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

Companies

A Company is an organizational entity that you are either doing business with now, or may be doing business with soon. We like to think of the Company as the building that the People you are dealing with work in. The Company record is the top level record that we relate other records such as People or Opportunities to.

Opportunities

An Opportunity represents any kind of business development effort that you would like to track and move along through a process. You could also call an Opportunity a "deal" or a "sale". An Opportunity could represent the sale of a product, billings associated with services, or an activity that has no direct monetary value, like increasing your press coverage.

Setting

This is where you define the following items that will set the data rules in your Sheet:

- Contact Type for People and Company
- Stage, Status, Source, and Loss Reason for Opportunities

You'll want to adjust this to what makes the most sense for your business process.