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Spilling the Tea!

On 5 Quick-Start
CRM Tips!



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Regularly Audit Your Data



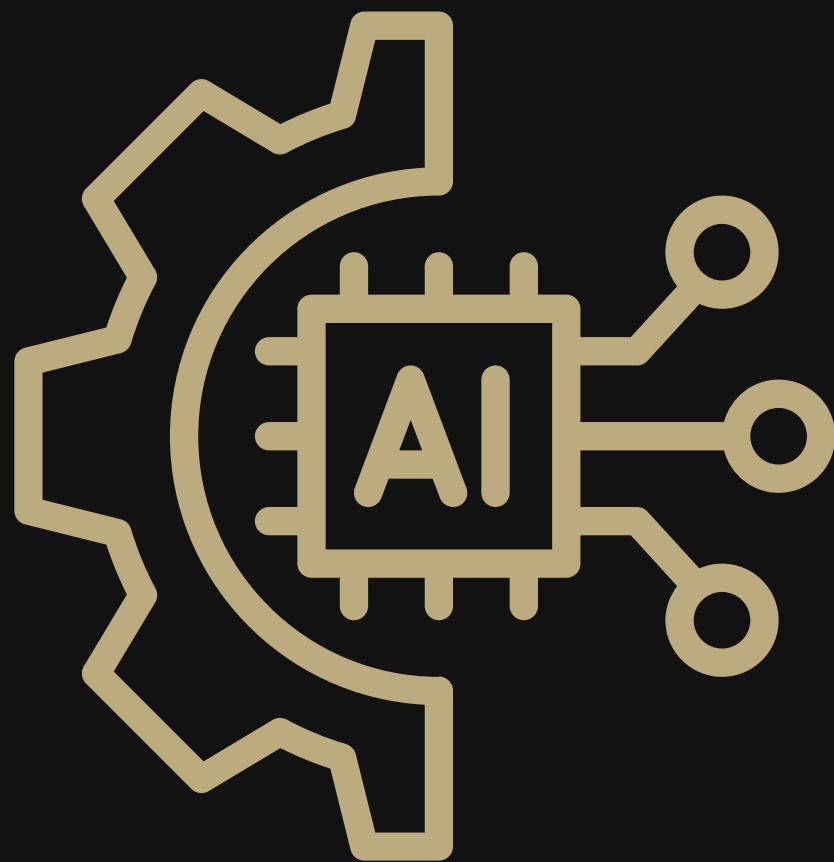
It sounds simple! but even spending **an hour a week** is better than coming back to “dirty data” this is my term.

But the general practice of any CRM Manager is to use **data hygiene** when filling out the new organisation or contact really take a minute to think “would any user of this CRM understand all the information on this card?”

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Use Automation to minimise tasks

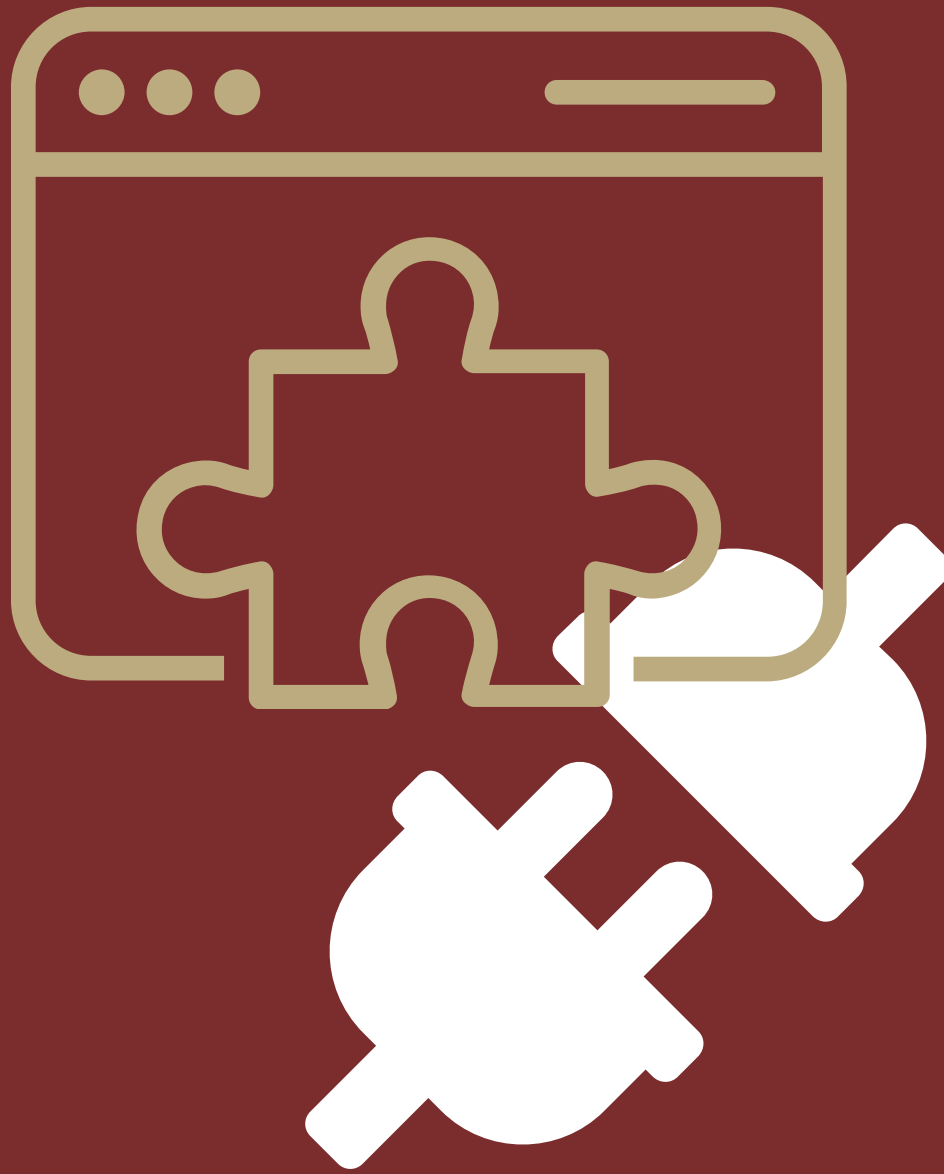
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Use Automation tools we've all seen this AI ✨ symbol knocking about! But don't fear!

For example you're setting up an **Organisation** with multiple people and they all have the same Landline and @xyz.com domain. There are platforms where you can automate it to have the same domain and telephone number when you add a new person to that specific organisation

Integrations and Plug-Ins: Integrate your CRM with other tools



There are **CRM Systems** out there which are increasingly adopting **plug-in's** (DM me for my plug-in quick-start guide)

Plugins enable you to have everything from your business in **One View** e.g. all your Invoices from **XERO** connected to your **projects** to track what's been spent vs the remaining balance.

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Training your Team Regularly



Regular training has a range of benefits but the key benefits to mention a few:

- **Clear Communication:** This ensures all the team are clear on user guidelines and best practices and any updates being rolled out with externally or internally.
- **Continual Development:** just like the crm, our people are continually developing. Training ensures we are optimising talent and matching them best to our tools!
- **Identifying and Troubleshooting:** Say everyone in your team is closing a new contact without fully populating their details its good to remind them of best practices to avoid unclean data.
- Establishing a **In-House or trusted CRM Advisor** can be cost-effective in the long run so your team has access to training and advise every step of the way.
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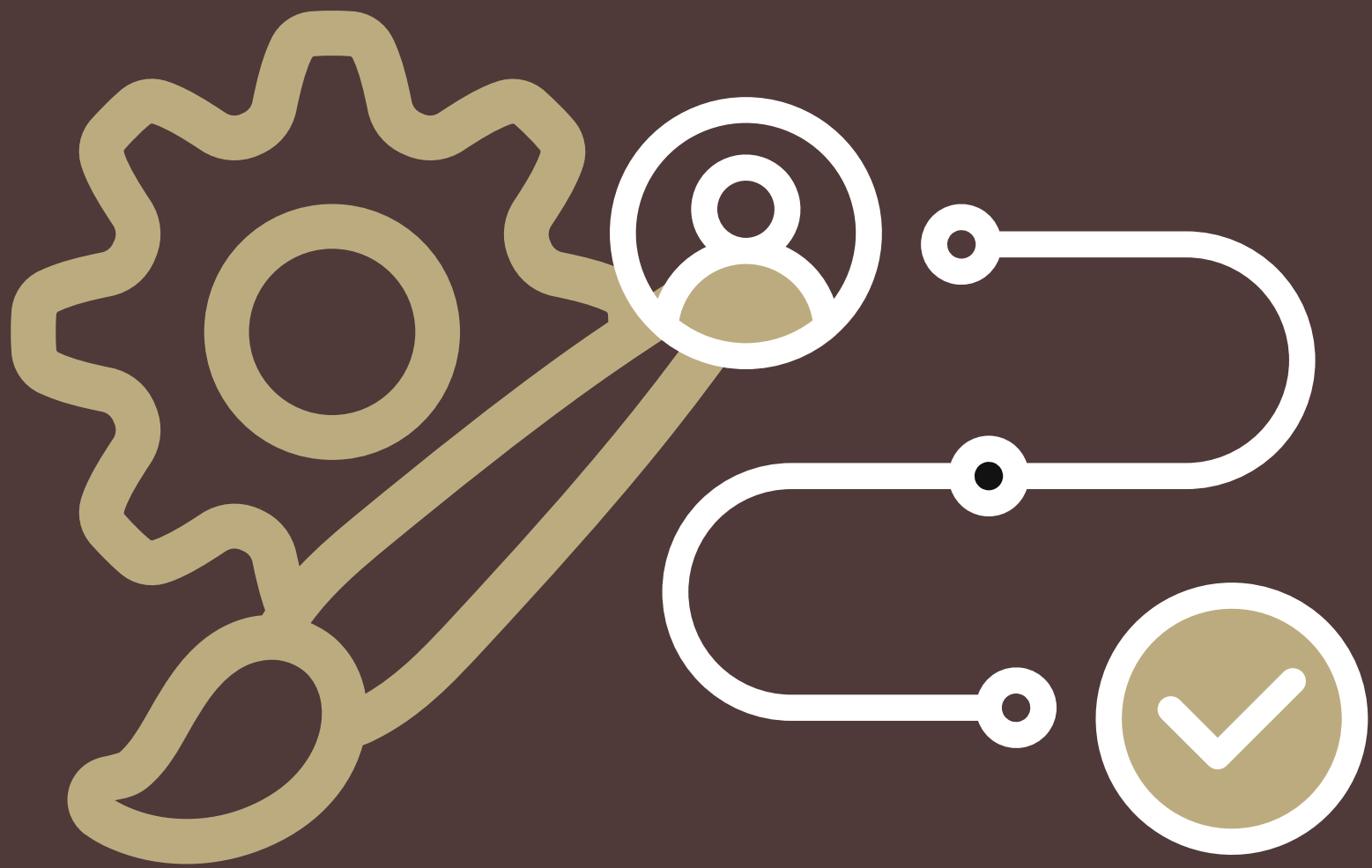
Blaine offers training workshops bespoke to your business or ongoing provision of sessions in-person or virtually acting as your In-House CRM Manager without fully employing a dedicated member of staff!

Contact us today to get a quote or email me:

angelica@blainecrmsolutions.com

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Customize your platform



One of my favourite features of CRM system is the ability to highly customize! Make the interface your own!

A few benefits of customizations, is the ability to tailor the CRM to fit your specific business needs, processes, and goals.

Map out tasks, projects and workflows.

This allows both a birds-eye view which can then be drilled down into individual team member view and their workload status.

If you want more tips! Head over to the BLAINE learning & Development Centre:

<https://blainecrmsolutions.com/learning-%2B-advice-hub>

Scan the Code Below to go to my CRM Learning and Advice Hub!

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BLAINE CRM Learning + Advice Hub



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