



CRM Basics: One System to Rule Them All

Unifying contacts, communication, and conversions

A GUIDE BY FRAYZE

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What a CRM Really Does

CRM stands for Customer Relationship Management. But it's not just software—it's a strategy for growing your business by organizing every customer interaction in one place.

The Simple Truth:

A CRM is your business's memory. It remembers every customer, every conversation, every purchase, and every opportunity—so you don't have to.

The Core Functions



Contact Management

Store all customer info in one place: names, emails, phones, addresses, notes, preferences, purchase history.



Communication History

Track every email, call, meeting, and message. See the full conversation timeline with each customer.



Sales Pipeline

Visualize where each prospect is in your sales process. Know exactly what to do next to close the deal.



Automation

Auto-send follow-ups, reminders, and nurture sequences. Never let a lead slip through the cracks.



Reporting & Analytics

See which marketing works, conversion rates, sales forecasts, and team performance at a glance.



Task Management

Assign follow-ups, set reminders, track tasks. Make sure nothing falls through the cracks.

Real Impact Example:

A Hamilton HVAC company implemented a CRM and within 6 months:

- Response time to leads dropped from 4 hours to 12 minutes
- Conversion rate increased 34% (better follow-up)
- Repeat business up 28% (automated reminders for maintenance)
- Team spent 15 hours less per week on admin

✓ Your CRM Setup Guide

Week 1: Foundation

- Define your sales process stages
- Map out customer journey touchpoints
- List all data fields you need to track
- Import existing customer data
- Set up user accounts and permissions

Week 2: Automation

- Create email templates for common responses
- Set up automated follow-up sequences
- Configure lead assignment rules
- Build your first workflow automation
- Test all automations thoroughly

Ongoing Success

- Weekly team check-ins on CRM usage
- Monthly data cleanup and deduplication
- Quarterly review of automation effectiveness
- Regular team training sessions
- Track key metrics and adjust strategy

Ready to Unify Your Business?

FRAYZE integrates CRM, automation, and marketing into one powerful system for Ontario businesses.

Visit frayze.ca or call +1 807-700-0079