



# **CRM Basics:** **One System to Rule Them All**

Unifying contacts, communication, and conversions

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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
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## 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
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## 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](https://frayze.ca) or call +1 807-700-0079**