tallguydigital

Turning Technology into Clients

# Get Your Shlists Together!

## An Introduction to Preparing & Managing Your Contacts to Gain More Business and Improve Processes

# Get Your Shlists Together!

Overview

1. Where Are Your Shlists?
2. What To Do with Your Shlists?
3. Which CRM?
4. Capture Your Shlists
5. Clean Your Shlists Up!
6. Import your Shlists to CRM
7. Implement Your  CRM
8. Integrate & Automate Your CRM
9. Leverage Your CRM

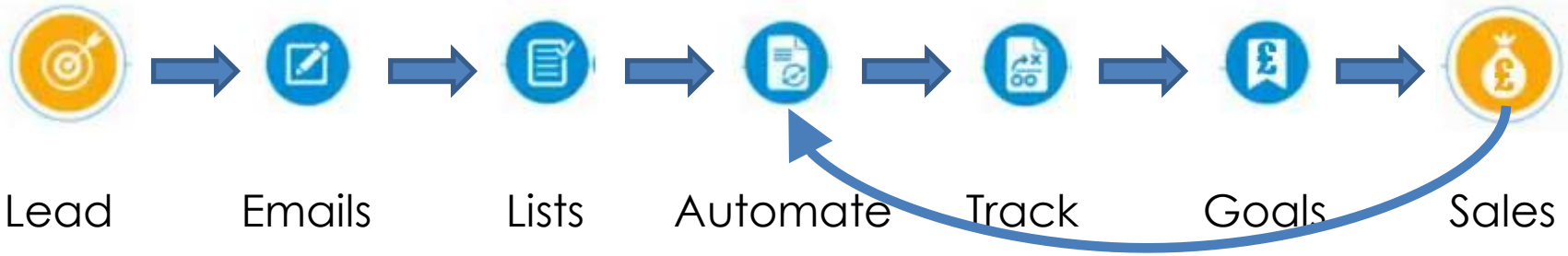
# Get Your Shlists Together!

## Overview

### A. An Example Traditional Client Flow

Lead Filing Letter Invoice Sales

### B. An Example Digital Client Flow



Lead Emails Lists Automate Track Goals Sales

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# Get Your Shlists Together!

## Overview
## Getting from A. to B.

### Get Prepared

1. Where are your shlists?

2. What to do with your shlists?

3. Which CRM?

### Get Digital

4. Capture your shlists

5. Clean up your shlists

6. Import your shlists

### Get Sales

7. Implement your CRM

8. Integrate & Automate your CRM

9. Leverage your CRM

# Get Your Shlists Together!

## Get Prepared

## 1. Where are your shlists?

Shlists have been hanging around in your business... Forever!

**There's gold in them thar shlists!**

# Get Your Shlists Together!

## Get Prepared

## 2. What to do with your shlists?

Identify and/or define your customer facing processes

- How do you record your customers? (**Management**)
- How do you get your customers? (**Acquisition**)
- How do you get your message to your customers (**Marketing**)
- How do your customers buy from you? (**Sales**)
- How do you keep your customers? (**Retention**)

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## Get Prepared

## 3. Which CRM?

The Cloud and SaaS (Software as a Service) now allow small and medium businesses and organisations to "play like the big boys" at various levels. Take a strategic look at where you are and where you would like to be.

- **Beginner**: Simple contact management – name, address, company, email, etc
- **Elementary**: Using contact management to generate invoices, letters etc
- **Intermediate**: Using contact management in simple marketing campaigns
- **Advanced**: Using contact management to generate and manage sales
- **Proficient**: Integrating contact management with other business processes
- **Expert**: Automating contact management throughout the business

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## Get Prepared

## 3. Which CRM?

Use "Freemium" offers to play with the options to find out one you feel comfortable with.

MailChimp  Capsule  HubSpot CRM  AgileCRM

You will need to balance cost, functionality and complexity.

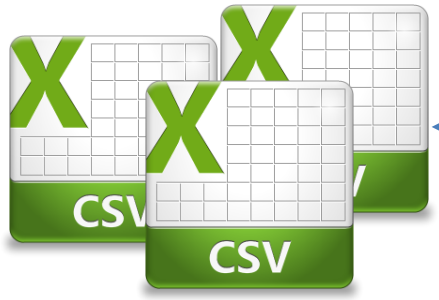
- Contacts
- Companies
- Reports
- Tasks
- Events
- Deals/Opportunities
- Cases/Projects
- Documents
- Campaigns
- Integrations
- Automation
- Access

# Get Your Shlists Together!

## Get Digital

## 4. Capture Your Shlists

| | A | B | C |
|---|---|---|---|
| 1 | First Name | Last Name | Email Address |
| 2 | Jane | Doe | jane@gmail.com |
| 3 | John | Doe | john@gmail.com |
| 4 | Chris | Perkins | cperk@gmail.com |
| 5 | Eva | Davis | eva@gmail.com |
| 6 | Mitchell | Tarver | mitch@gmail.com |
| 7 | Nathan | Woodward | nathanwoodward@gmail.com |



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## Get Digital

## 5. Clean Your Shlists Up

a) Make sure your captured data is in the correct format

| | A | B | C | D | E | F |
|---|---|---|---|---|---|---|
| 1 | First name | Last name | Email | City | Postcode | |
| 2 | Foster | John | jfoster@gmail.com | Liverpool L34 9XX | | |
| 3 | Joe | Joe Bloggs | | PR9 4QW | Southport | |
| 4 | Smith | Alan | alan.smith@livbus.co.k | Wirral | CH49 1AS | |
| 5 | Ann | Jones Ann | annjones | annjones@yahoo.co.uk | L39 5RT | St. Helens |

CSV

| | A | B | C | D | E |
|---|---|---|---|---|---|
| 1 | First name | Last name | Email | City | Postcode |
| 2 | John | Foster | jfoster@gmail.com | Liverpool | L34 9XX |
| 3 | Joe | Bloggs | checkemail@joebloggs.co.uk | Southport | PR9 4QW |
| 4 | Alan | Smith | alan.smith@livbus.co.uk | Wirral | CH49 1AS |
| 5 | Ann | Jones | annjones@yahoo.co.uk | St. Helens | L39 5RT |

CSV

# Get Your Shlists Together!

## Get Digital

## 5. Clean Your Shlists Up

b) Add in extra fields for reference

| | A | B | C | D | E |
|---|---|---|---|---|---|
| 1 | First name | Last name | Email | City | Postcode |
| 2 | John | Foster | jfoster@gmail.com | Liverpool | L34 9XX |
| 3 | Joe | Bloggs | checkemail@joebloggs.co.uk | Southport | PR9 4QW |
| 4 | Alan | Smith | alan.smith@livbus.co.uk | Wirral | CH49 1AS |
| 5 | Ann | Jones | annjones@yahoo.co.uk | St. Helens | L39 5RT |

CSV

| | A | B | C | D | E | F | G | H |
|---|---|---|---|---|---|---|---|---|
| 1 | Ref | First name | Last name | Email | City | Postcode | Source | Lead |
| 2 | TGD01 | John | Foster | jfoster@gmail.com | Liverpool | L34 9XX | Buscard | Hot |
| 3 | TGD02 | Joe | Bloggs | checkemail@joebloggs.co.uk | Southport | PR9 4QW | Invoice | Cold |
| 4 | TGD03 | Alan | Smith | alan.smith@livbus.co.uk | Wirral | CH49 1AS | Outlook | Warm |
| 5 | TGD04 | Ann | Jones | annjones@yahoo.co.uk | St. Helens | L39 5RT | Buscard | Hot |

CSV

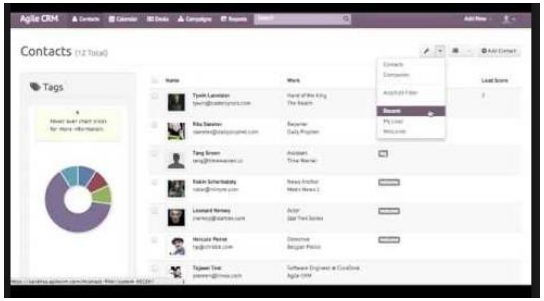
# Get Your Shlists Together!

## Get Digital

## 6. Import Your Shlists into Your CRM

| | A | B | C | D | E | F | G | H |
|---|---|---|---|---|---|---|---|---|
| 1 | Ref | First name | Last name | Email | City | Postcode | Source | Lead |
| 2 | TGD01 | John | Foster | jfoster@gmail.com | Liverpool | L34 9XX | Buscard | Hot |
| 3 | TGD02 | Joe | Bloggs | checkemail@joebloggs.co.uk | Southport | PR9 4QW | Invoice | Cold |
| 4 | TGD03 | Alan | Smith | alan.smith@livbus.co.uk | Wirral | CH49 1AS | Outlook | Warm |
| 5 | TGD04 | Ann | Jones | annjones@yahoo.co.uk | St. Helens | L39 5RT | Buscard | Hot |

CSV



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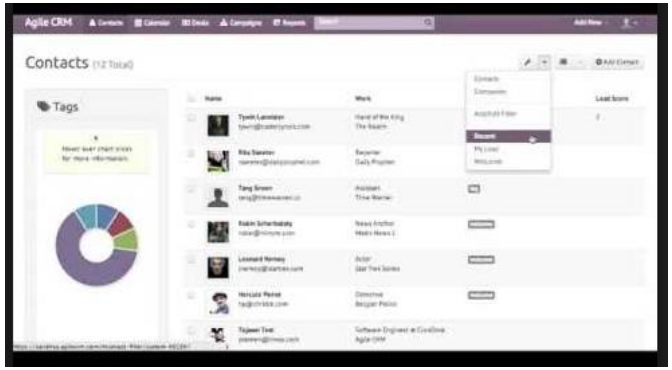
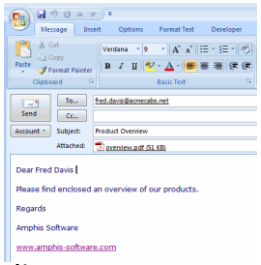
## Get Sales

## 7. Implement your CRM

Meetings

Letters, mailshots




Emails

Phone calls

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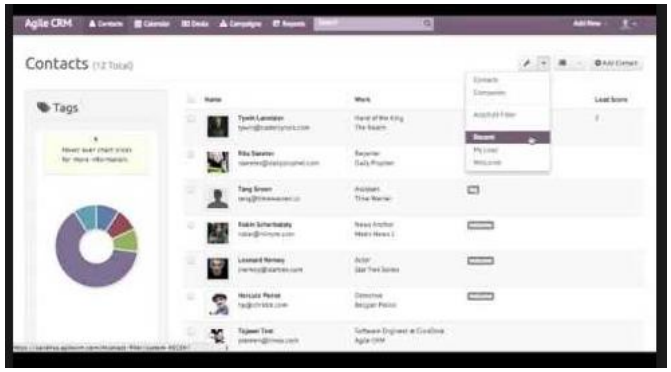
## Get Sales

## 8. Integrate & Automate your CRM



Google Analytics

1 intuit QuickBooks
2 FRESHBOOKS painless billing
3 ORACLE Financials
4 Microsoft Dynamics
5 sage
6 wave accounting
7 xero
8 Bill.com
9 LESS ACCOUNTING
10 SAP

HELPDESK

Stock Control

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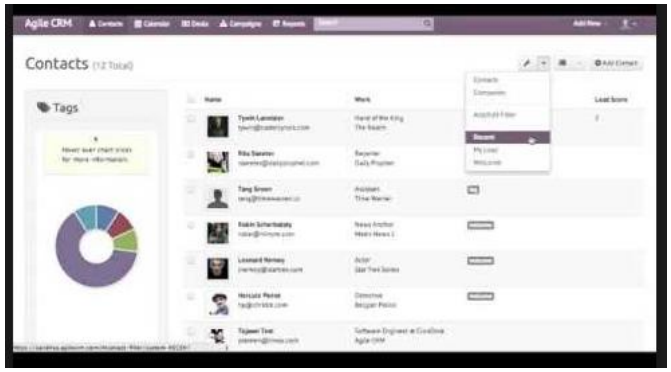
## Get Sales

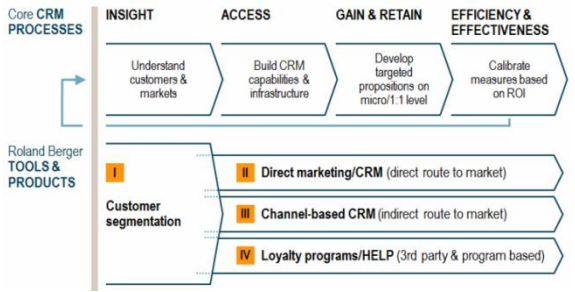
## 9. Leverage your CRM

Team buy-in, procedures



Dashboards, Reports

Data On-the-Go




Customer segments, Strategy

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the progress of opportunities. It also permits the tracking of 'Customer cases' and includes basic but very useful project tracking functionality. The freemium offer of 250 contacts may be a limiting though.

HubSpot CRM

One of the best freemium offers – unlimited contacts and the core CRM functionality of HubSpot CRM is and will always be free. It connects to the places where the modern sales process takes place - website, email, phone calls, social media, and more.

AgileCRM

The excellent freemium offer of 1000 contacts will be adequate for many small businesses and it provides powerful CRM functionality with sales and marketing automation. It compares favourably to some of the more expensive automated marketing solutions such as InfusionSoft, Salesforce and Marketo

4.0 Get Digital on Your Shlists with Data Capture

Having identified where your contacts are hiding away, you then need to find the best way of starting to collate these lists into a suitable electronic data format (usually into a CSV file using Excel or similar).

Most businesses that are just starting with contact management/CRM systems will have their contacts recorded in a combination of one or more of the sources listed below.

Depending on the number of contacts you wish to capture, the Tall Guy can help you decide whether a manual or technology solution is going to be the most cost-effective.

4.1 Invoices, Letters

If you have only kept paper copies of your invoices, letters etc. this can be the most laborious, tedious task of capturing contact details, especially if they are not in some sort of standard/template format. Obviously in many cases these paper copies will have their electronic source which can help speed up the data capture considerably. However, the Tall Guy can help you analyse the most efficient way forward and in many cases it is possible to use scanning and character recognition techniques to do this.

4.2 Business Cards

As with paper copies and letters, business cards can present a tedious task. There are however many applications around which can speed up this process – many of these apps are free. The Tall Guy can again help you decide the best way forward.

4.3 Word/Excel documents

If you have created your invoices and letters as Word or Excel documents, it may be worthwhile to analyse the format of these to determine whether a customised application would be able to save you time and money to capture the contact details contained in them.

4.4 Emails

If you use email to send out your invoices/correspondence, the Tall Guy can help you decide whether it will be possible to capture contact details. This depends on how you send your email (do you use Outlook and which version or do you use an online interface such as

TGD Free Guide Page 6 of 10 Get Your Shlists Together

## Need more help or information?

To get a more detailed guide including hints and tips to help you "Get Your Shlists Together", please request a free consultation at [www.tallguydigital.co.uk/gyst-consultation/](www.tallguydigital.co.uk/gyst-consultation/) or call me on 07548 003275