

How a CRM Can Help You Finish the Year Strong

As we approach the end of the year, it's an ideal time to review your business and the progress you have made. It is also the right time to commit to good habits so that the holiday season does not distract you from your goals.

Use a customer service management tool now to finish the year strong and to start the next year on track. No CRM? No problem, here are the top things to look for in a quality CRM.



1 Organize Your Database for Maximum Productivity

Your database is the lifeline of your business. Choose a CRM that will:

- ✓ Organize your contacts in one place.
- ✓ Track which clients or leads should receive most of your attention.
- ✓ Help you to curate detailed notes to sustain long relationships with your clients and leads.

2 Productivity Tools

A CRM that allows you to build structure and routines into your day will keep you focused. Your CRM should also:

- ✓ Allow you to add your financial goals and get action steps to reach them.
- ✓ See your daily priorities and easily check them off.
- ✓ Schedule your time with weekly, monthly and annual calendars.

3 Reports to Help you Stay on Track

Look for a CRM that offers reporting, so you know exactly how your business is doing.

- ✓ See how each relationship is moving through the sales pipeline.
- ✓ Review your progress toward your goals.
- ✓ Keep track of financial transactions and business expenses.

4 Connect With Your Clients

A CRM can help you manage and schedule ways to connect with your clients so you always stay top of mind. **List your top five clients here and check the box on how you will reach out to them*.**

	Call	Note	Meeting
1. _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**A smart CRM will automatically tell you how to do this.*

Visit buffiniandcompany.com/freecrm to sign up for a free, non-commitment trial and see for yourself how a CRM can help increase your productivity, closes more sales and make more money!