

# THE ULTIMATE CRM CHEAT SHEET



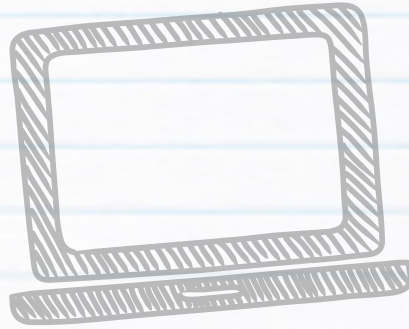
## OVERVIEW:

*If you're using a CRM, you already know that you should be including all of your client's contact information. But if that's all you're doing, you're missing out on valuable opportunities to connect.*

**Print out this helpful guide and keep it in your work space, so that you remember to capture the information you can really use.**

## WHAT'S INCLUDED:

- **The Ultimate CRM Cheat Sheet**  
*A guide to recording the data that will help you build profitable relationships.*



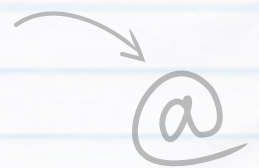
# THE ULTIMATE CRM CHEAT SHEET

If used properly, your CRM will help you keep track of your clients and get more referrals and repeat business. When you record the information that really matters, you can stay connected with customers and ensure your business remains top of mind.

## CRM 101



- **CONTACT INFORMATION.** At a minimum, your CRM should have the names, addresses, phone numbers, and email addresses of all your clients. If you don't have this info, you can't simply can't keep in touch.



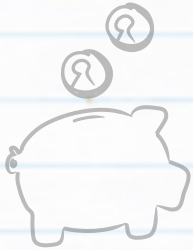
- **YOUR RELATIONSHIP WITH EACH CLIENT.** If you're looking to follow up with someone, you should be able to reference which products or services they've previously purchased (or expressed interest in).



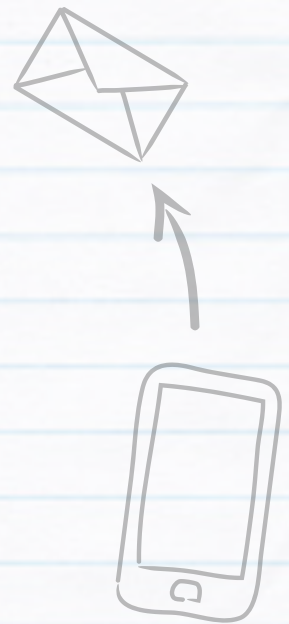
- **NAMES OF SPOUSES AND CHILDREN.** When you check in with your clients, asking about their family isn't just a great icebreaker—it's also a strong indication of your commitment to the relationship you have with them.



# INTERMEDIATE CRM



- **PREFERRED METHOD OF CONTACT.** Whichever way your client prefers to be contacted, sticking mostly to that method will maximize their comfort and, ultimately, build trust.
- **THEIR OCCUPATION.** Your clients know what you do for a living, but do you know what they do? You should. Your client's job is a huge part of their life, and you should take an interest in their professional success.
- **DETAILED INFO ABOUT THEIR FAMILY.**
  - What does your client's spouse do for a living?
  - How old are their children?
  - Do their kids play sports?
  - Do they have pets?



**Your customers likely don't expect you to remember all this info, but they'll be impressed when you do!**

# ADVANCED CRM



- **YOUR CLIENT'S HOBBIES.** When you know what your client does in their free time, you have organic opportunities to reach out and have conversations. This builds rapport.
- **THEIR VALUES.** Does your client support any charities? Make a donation or volunteer your time. By going above and beyond, you'll prove that you're committed to their happiness and well-being.
- **THEIR DREAMS.** What do your clients really want out of life? How can you help them get there? Be sure to also share your goals and dreams. When you do this, your clients will become invested in your success.





# CHECKLIST

- ☐ **CONTACT INFORMATION**
- ☐ **THE PRODUCT OR SERVICE YOU PROVIDED OR THEY ARE INTERESTED IN**
- ☐ **NAMES OF SPOUSES AND CHILDREN**
- ☐ **PREFERRED CONTACT METHOD**
- ☐ **CLIENT'S OCCUPATION**
- ☐ **DETAILED INFO ABOUT SPOUSE/CHILDREN**
- ☐ **DO THEY HAVE PETS?**
- ☐ **CLIENT'S HOBBIES**
- ☐ **CLIENT'S VALUES (EX: CHARITIES SUPPORTED)**
- ☐ **CLIENT'S GOALS/DREAMS**
- ☐
- ☐
- ☐