

CRMX NEW CUSTOMER ROADMAP

 complete this roadmap
in your first 30 days

Setup Fundamentals	Get Organized	Test Everything	Launch
✓ Add Data Credits ✓ Business Profile ✓ Personal Profile ✓ Domains ✓ Email ✓ Phone (A2P verified) ✓ Download Mobile App ✓ ⚠ Social Media Channels ✓ ⚠ Google Business Profile ✓ ⚠ Integrate personal calendar "Get the foundation in place"	✓ Add team members ✓ Import your contacts ✓ Create a smart list for all paying customers ✓ ⚠ Setup a team calendar ✓ ⚠ Build links page for social media ✓ ⚠ Build lead funnel ✓ ⚠ Build basic website ✓ ⚠ Add chatbot to site ✓ ⚠ Setup google review request automation "Organize contacts & lead capture mechanisms"	✓ Add a test contact ✓ Send test sms, email, and phone call ✓ Test website chat bot ✓ Test lead funnel ✓ Book an appointment ✓ Test social media post from scheduler ✓ Test sending a google review "Test everything"	✓ Publish your website and lead funnels ✓ Add the links page to your social channels ✓ Send your first email broadcast to your list ✓ Schedule your first social posts ✓ Manage the conversation inbox from your mobile app or desktop "Start using it daily"



Ideas

- Manage conversations on the go with the CRMX mobile app
- Setup a "call tree" for incoming calls to handle sales, support, billing, etc (aka: IVR)
- Build one simple automation per week in your first 60 days to save time and money fast



Key

Unless it's marked as optional, do it no matter what!

⚠ = Highly suggested, but optional