A Simplified Guide To The STS CRM ™

To help you attract - nurture - sign & retain high paying clients on autopilot.

OVERVIEW

Data dictates the growth of your business but with a million and one different forms of data these are the Key Performance Indicators (KPIs) we deem truly necessary to help your business consistently grow.

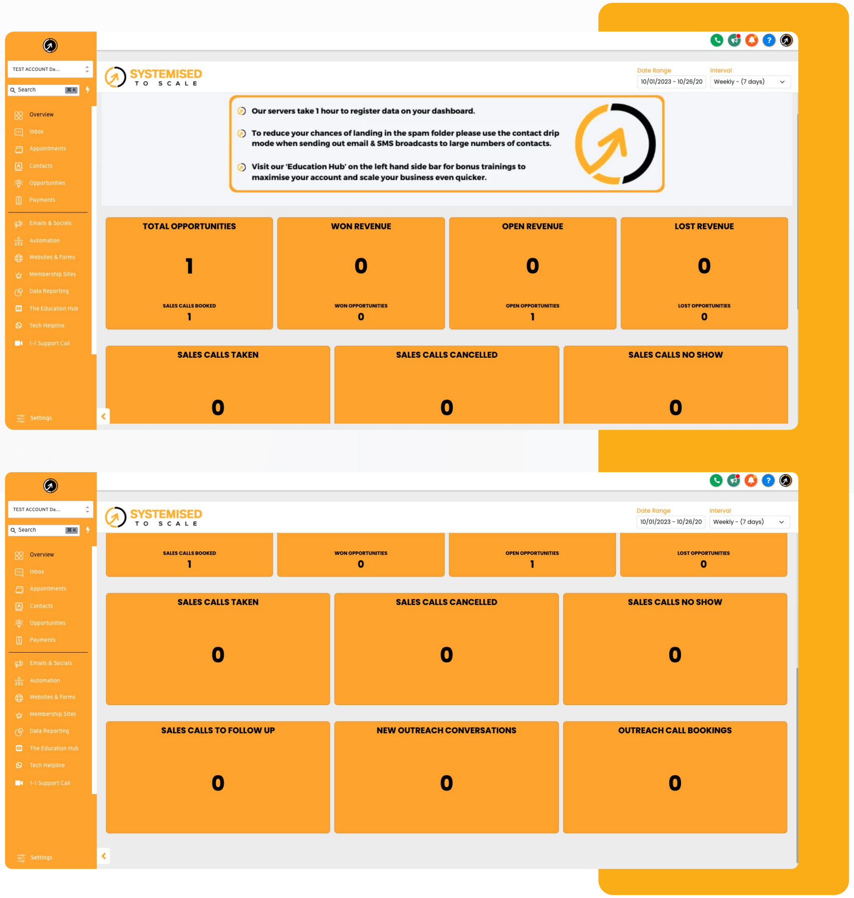
The overview section of your SystemisedToScale CRM™ will summarised your key business metrics so that you have clarity on the direction that your business is progressing.

- **Opportunities** = Total number of leads
- **New Outreach Conversations** = Total number of new outreach conversations
- **Outreach Call Bookings** = Total number of calls booked from outreach conversations

KEY TAKEAWAY

Toggle the dates section and look back through your previous business performance. We suggest blocking off 30 minutes once a week to review your previous 3 weeks business metrics and use these to help forecast the direction your business is moving in this coming week.

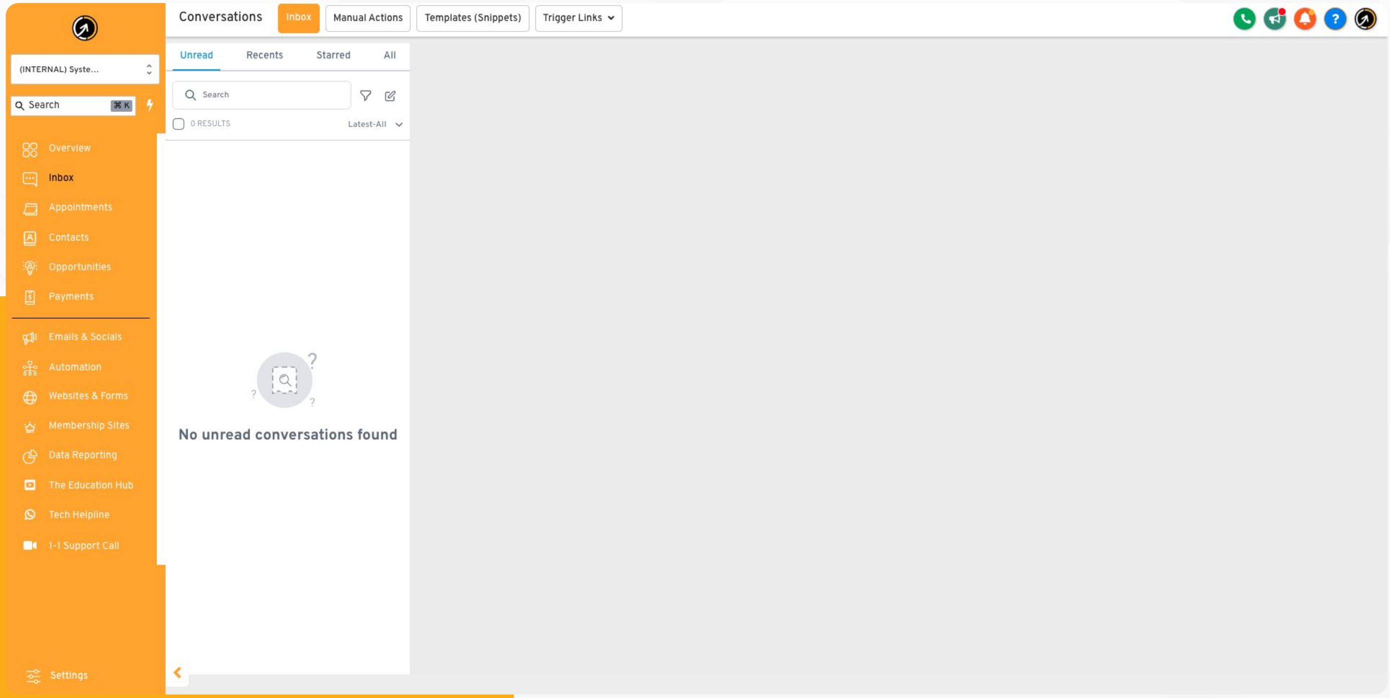
One of the most important data points on the dashboard is looking at your lead source report and realising which areas of your business are actually generating not only leads but also sales.



SYSTEMISED
TO SCALE

INBOX

Running a business comes with handling a lot of tasks and important decisions every day and as a result reducing distraction along with the time needed to perform each task is incredibly important. The inbox section will bring all of your inboxes together to reduce distraction scrolling through social media but also improve efficiency as a result of being able to reply to all of your messages in one inbox.
Any replies to your SMS outreach (be that the automated messages we send out or if you're manually reaching out to leads) will appear in this inbox section along with replies to your emails sent from the system. However, email replies will also be sent to your business email address just like if I was to reply to an email that you had manually sent to me.



KEY TAKEAWAY

We suggest adding your assistant to the system so that this job can be taken off of your plate and delegated to allow you to spend your time on tasks that are more important for the business.

Click the filter icon and toggle between certain platforms to see the specific messages and easily work through these.

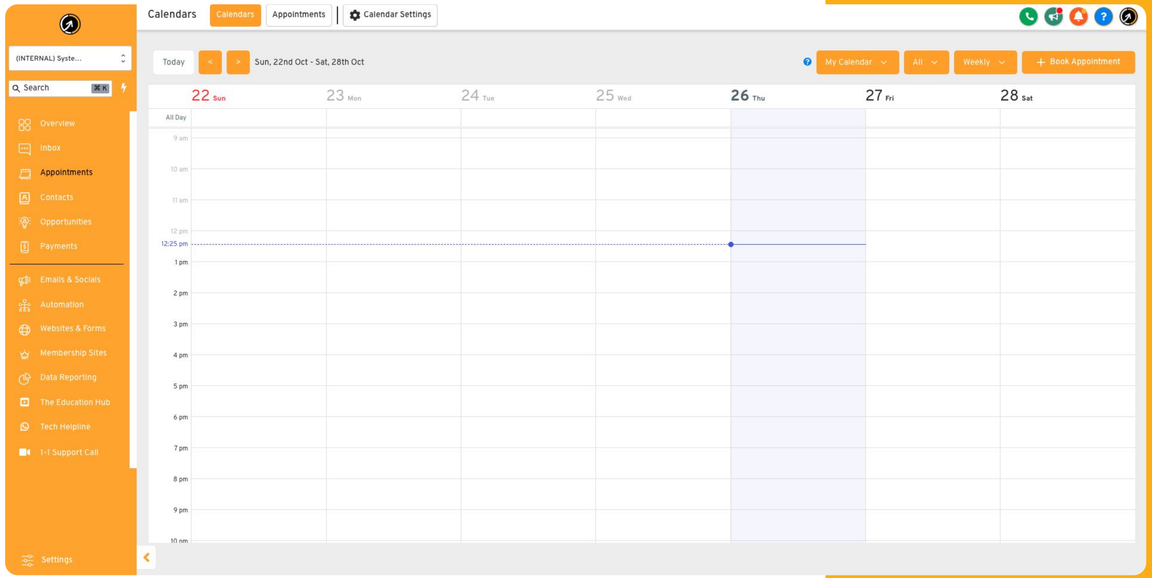
SYSTEMISED
TO SCALE

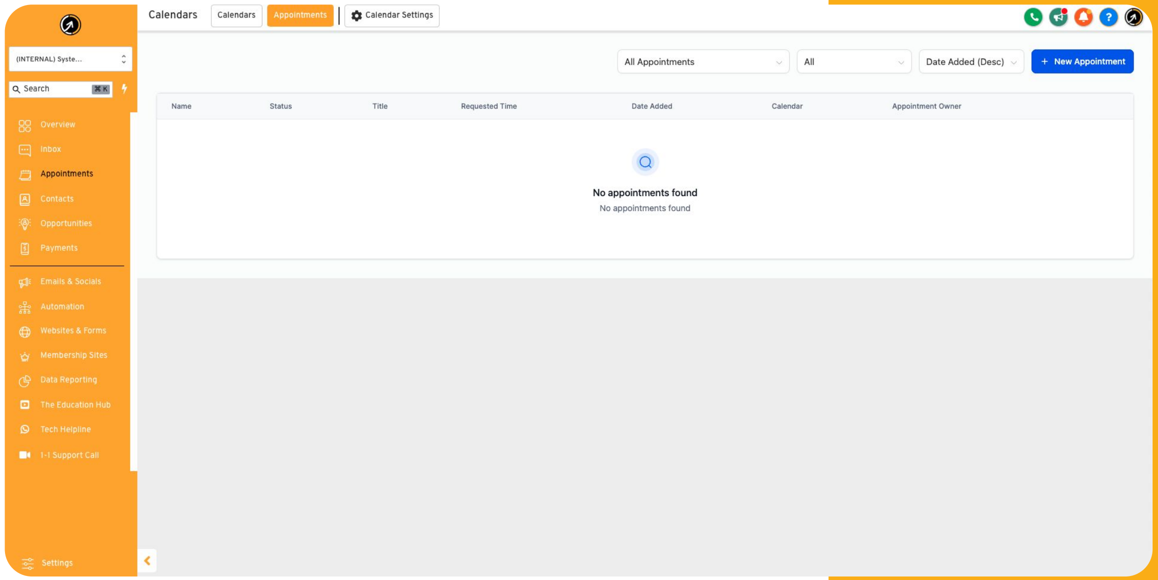
APPOINTMENTS

You will need to take bookings to speak to potential clients and even to current clients to check up on their progress. This section will mirror your Google or Apple calendar and allow you to not only manage your personal calendar but also your teams.

We will build the necessary booking links for you and your team and each time an event is booked this will automatically add this into the appropriate team members calendar along with generating the meeting link and sending this to the individual who has booked the event. In addition, this will not only trigger the appropriate reminders to the individual who has booked the event but it will also trigger specific automations which we will discuss with you in more detail on your Walkthrough Call.

Please note we will set your availability to the timings discussed during our calls, however if you would like to adjust your availability please simply send us a WhatsApp message letting us know the timings you would like adjusting and we will sort this for you.





KEY TAKEAWAY

Click appointments to view every booking that has been processed in your business.

SYSTEMISED
TO SCALE

CONTACTS

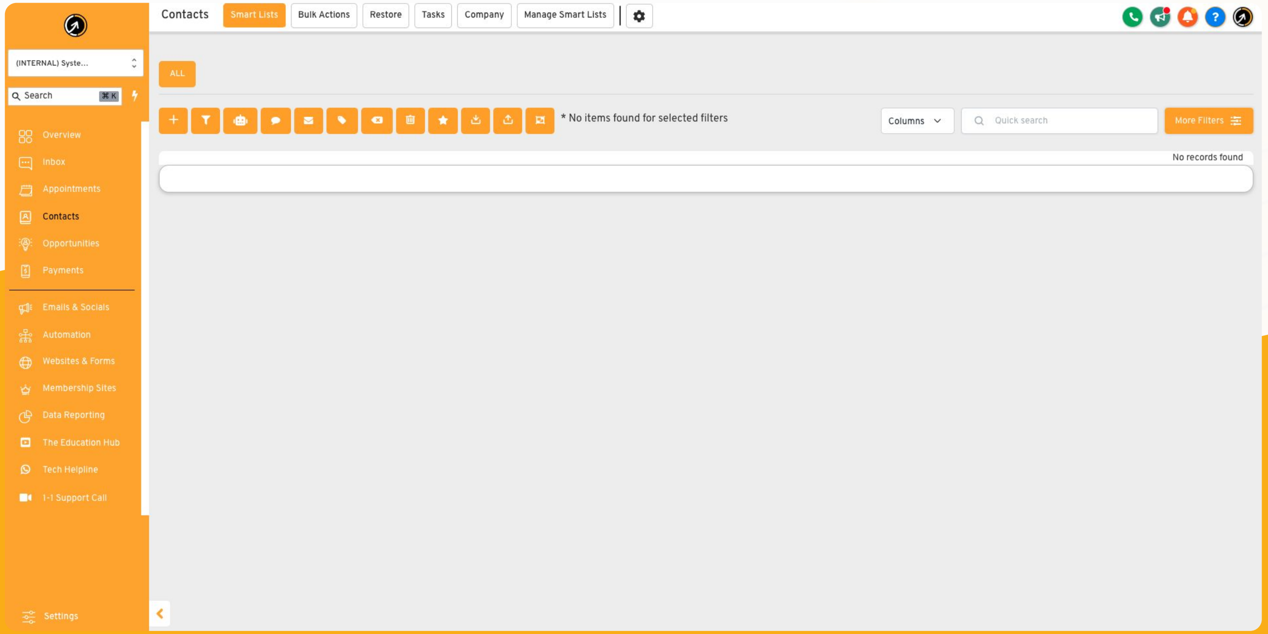
Leads from your different marketing avenues such as your enquiry process or lead magnets will automatically be stored here along with all of their contact details. In addition, any lead that messages through any of your social media platforms will also automatically be stored in this section as well. If the contact has a green text icon next to it this means that this lead came from social media.

- **Phone Icon** = To ring the lead and have a normal phone conversation
- **Send SMS** = To send SMS outreach (click the timer next to send to schedule)
- **Send Email** = To send email outreach (click the timer next to send to schedule)
- **Instagram DM** = To send an Instagram message (if the lead came from Instagram) (note the same applies for Facebook)

KEY TAKEAWAY

We will provide you with your own phone number that is linked to all of your outreach to allow you to have a separate SMS number for leads and to keep your current number specific to just clients.

We will discuss with you and connect your current email account so that all of the emails will be sent from your usual domain along with all of the replies arriving in your email account like normal.



OPPORTUNITIES

Think of the opportunities section as your different whiteboards. We will discussed which opportunity boards are necessary for your business, however as an example you may have the following

- **Task Management** = To help you manage tasks and keep notes
- **Lead Management** = To help you manage your organic outreach
- **Enquiry Management** = To help you manage your enquiries
- **Client Management** = To help you manage your clients

The two boards which are initially the most important are the enquiry management and client management boards. Any potential client that submits an enquiry form or books a call will automatically appear on the enquiry management board for you.

Potential clients will automatically move between the applied and booked section and will automatically receive the appropriate follow ups to move them from one section to the next.

KEY TAKEAWAY

This is where a lot of revenue will be generated for your business if you spend a few moments after each sales call making sure it is kept up to date.

FOLLOW UP = No automations trigger. This is a place for potential clients who need following up at a later date

WON = Triggers your onboarding sequence and moves the client to the client management board under the awaiting onboarding section. Once you have set up the client simply drag them to week 1 and they will automatically move across the timeline every week.

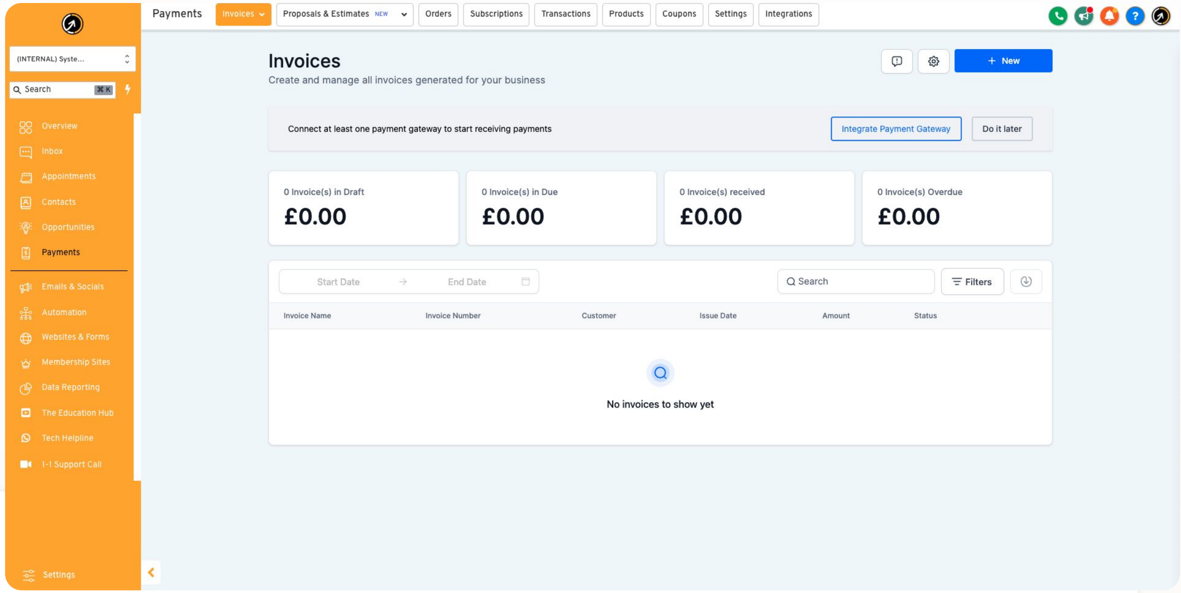
NO SHOW = Triggers a follow up sequence to potential clients to rebook if they didn't show to their sales call.

LOST = Triggers a follow up sequence to potential clients who are unconverted.

PAYMENTS

This is linked to your chosen payment processor (most likely Stripe or PayPal) and will process any payments through your chosen payment processor exactly like normal. We will simply create the necessary website pages so that the payment pages visually look on brand and aesthetic. Your payment processor will take the usual fees for processing the payment.

- **Subscriptions** = To view all the subscriptions created from your payment pages
- **Transactions =** To view all of the new and ongoing transactions from your payment pages
- **Products** = To view all of the products created for your payment pages



KEY TAKEAWAY

Every payment will be processed through your payment processor like normal. You will notice an initial transaction that says 'Authorization' which is simply the payment processor checking that the potential client's card is valid prior to then charging their card as normal.

SYSTEMISED TO SCALE

EMAILS & SOCIALS

This will not only allow you to schedule content across all of your social media platforms but you will also be able to create and broadcast email campaigns to all of the contacts in your business.

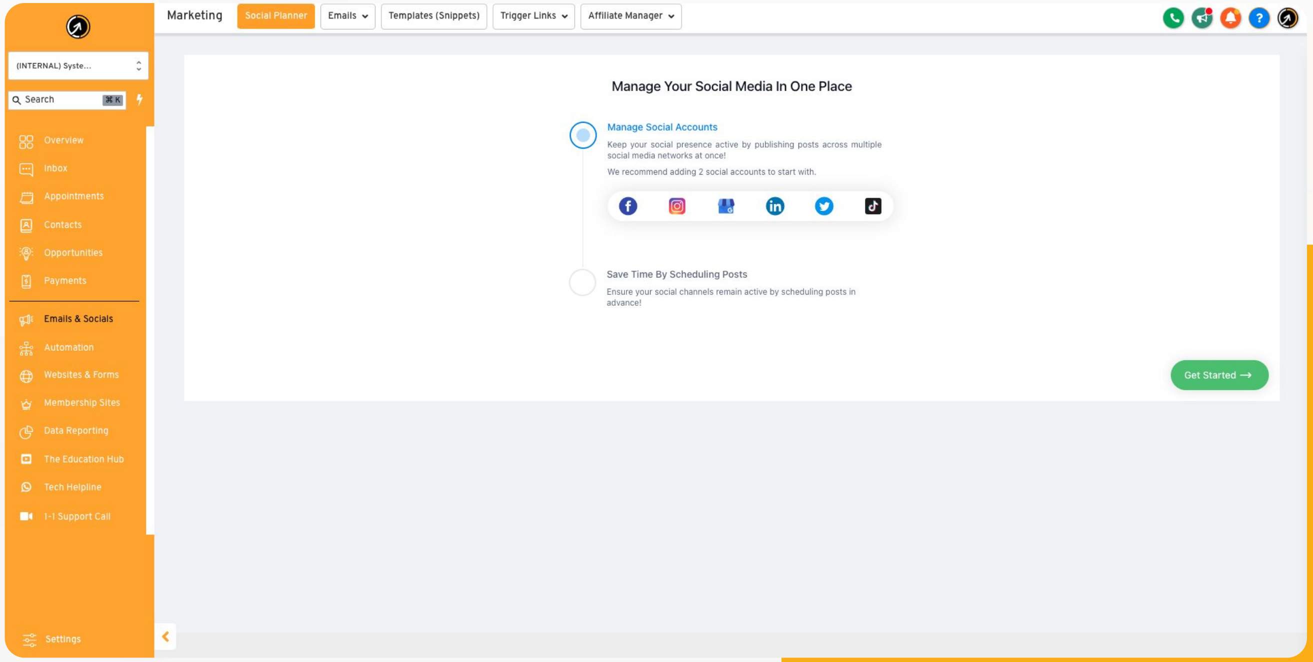
KEY TAKEAWAY

Building an audience that you own which is separate to your social media account is key to not only increase revenue but to also build a sustainable long term business.

We all know how temperamental social media can be at the best of times and all it takes is for your social media account to be banned and you have lost your ability to generate leads.

Whereas with an email list you do not have to worry about this ever being banned or lost. Just like when posting on social media you need a clear plan for not only the type of content that you're posting but also the schedule.

Here's a walkthrough on how to schedule and broadcast email campaigns along with the framework we have seen generate the most sales. Click here

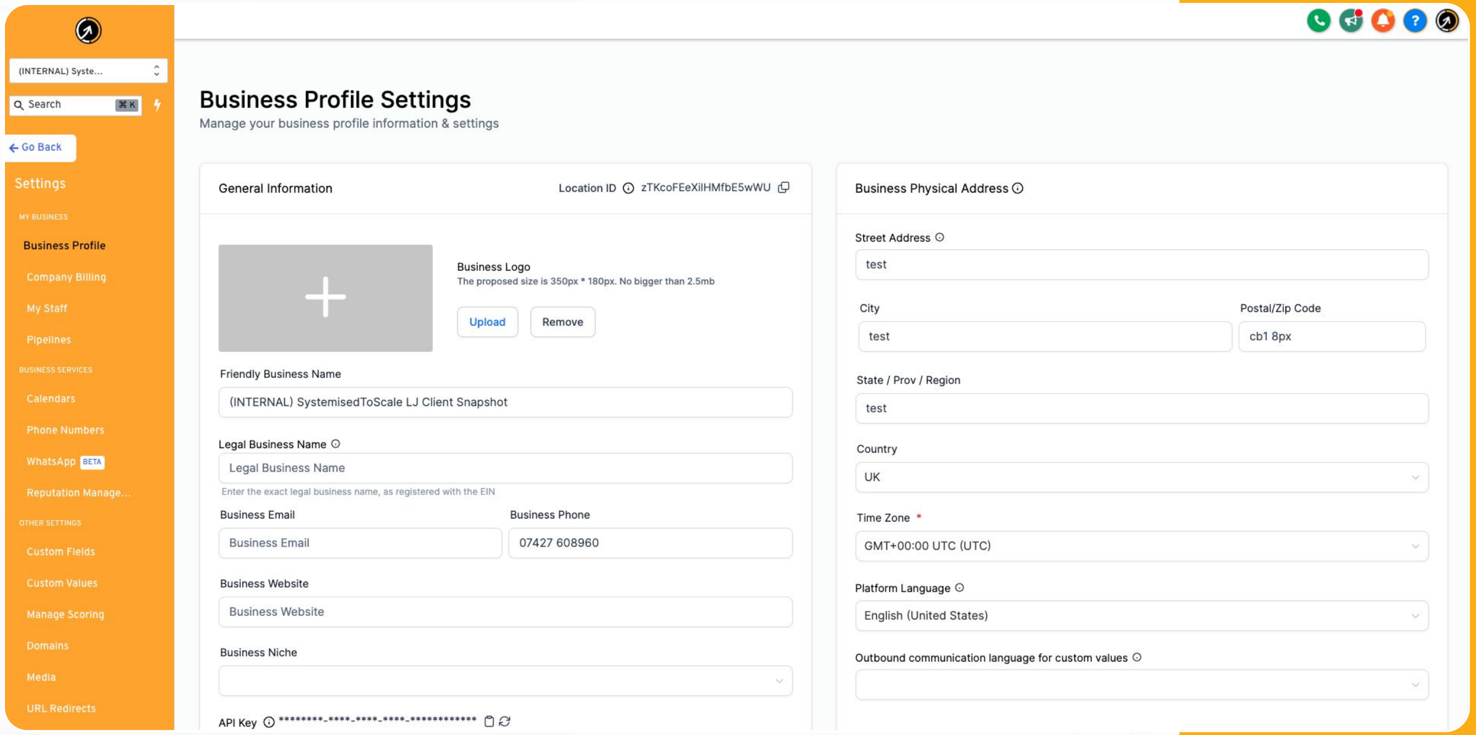


SYSTEMISED TO SCALE

SETTINGS

There are a variety of different settings, however the only section we suggest you need to ever focus time on is the My Staff section. We will discuss with you which of your staff members require access and integrate them into the system for you. However, if you would like to also add in future staff members you can simply click Add Employee and input their details and they will automatically be sent an email with their logins.

Each staff member's settings can also be adjusted so that they can only see certain aspects of the system as well.



Watch A Full Walkthrough Of The STS CRM™

Please make sure to watch this walkthrough prior to your walkthrough call along with making a list of any questions. Click Here

SYSTEMISED TO SCALE

Any Questions Before Your Walkthrough Call?

Please send us a WhatsApp. Click Here

SYSTEMISED
TO SCALE

Thank You