YOUR COMPLETE GUIDE TO THE STS CRM™

CONTENTS

SIMPLIFIED SUMMARY

The SystemisedToScale CRM™ will only allow you to scale your revenue whilst saving a large amount of time if you understand how to truly maximise the system. Please take your time working through this handbook as it is incredibly important that you have full clarity across all of the aspects of your account.

Simplified Walkthrough

SYSTEMISED
TO SCALE

OVERVIEW

In order to make decisions in your business you need clear data that is simple to read and gives you perspective on what is working and what isn't working. The 'Overview' section will automate this aspect of your business and present you with easy to understand data at whatever time interval you wish.

Step-by-step Guide

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INBOX

This section combines all of the areas where leads or clients may message you and your business and presents it in an easy to reply format, allowing you to scale your outreach and client numbers and easily respond to conversations all in one place.
Chances are as your business scales so will your team and part of your team will most likely be involved in handling some of these conversations. We can add as many members of your team to your STS CRM™ account so that they have their own logins and sharing preferences so that they can help respond to conversations if required.

IG / FB Wording

Step-by-step Guide

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APPOINTMENTS

The best way to think of this section is like your calendar due to the fact that it will mirror any events inside your current calendar. You can also easily toggle between your staff members calendars to view their schedules along with seeing all of the calls that have been scheduled across your business.

Email / SMS Client Calls Wording

Email/SMS Testimonial Process Wording

Step-by-step Guide

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CONTACTS

This section automatically stores all of your leads in one place. From phone numbers, to emails and even through to social media contacts. The minute a lead fills out an enquiry form or messages you across social media they will automatically be stored in this section and added to the appropriate 'Smart List' which is a list of contacts to simplify the process of sending out broadcast messages.

Step-by-step Guide

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OPPORTUNITIES

The best way to think of the 'Opportunities' section is a series of different whiteboards containing all of your businesses potential deals along with current and past clients all in an easy to use and understand format. From leads who have been spoken to on social media, to leads that have downloaded your lead magnets, to upcoming sales calls and even through to current and previous clients. This is one of the most important areas that you need to be engaging with on a regular basis in order to consistently scale your business.

Email / SMS Client Left Wording

Email / SMS Client Checkins Wording

Email/SMS Enquiry/Application Wording

Step-by-step Guide

Bonus Guide 1

Bonus Guide 2

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PAYMENTS

The finance side of your business is incredibly important but often presents a few challenges due to handing over access to your businesses payment processor such as Stripe or PayPal. This section mirrors your payment processors and displays a total overview of all previous, current and upcoming transactions in your business along with their status. This section is where you can easily see all transactions from payment pages that are built inside your STS CRM™ account.

Email / SMS Onboarding Wording

Step-by-step Guide

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EMAILS & SOCIALS

In order to scale you need traffic and attention from your audiences and chances are two of the main avenues where this will come from is your social media and email / sms marketing. Inside this section you can automate your social media posting across every platform (through to even Instagram stories) so instead of just being present on one platform you can schedule the same piece of content to go out on another platform to build a bigger audience and not be reliant on just the one social media account. In addition, this section will allow you to broadcast campaigns to your contact list.

Step-by-step Guide

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AUTOMATION

This section will quite literally run your business. Due to the complexity of automations we will handle the complete build of all of your systems so please do not adjust this section as this can cause issues unless the adjustments are made in a specific way. If you wish to make adjustments to this section please simply reach out to us via our WhatsApp Tech Helpline.

WhatsApp Tech Helpline

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WEBSITES AND FORMS

This section will contain all of your funnels, forms and surveys that are used to capture leads and handle certain parts of your service delivery. This section allows you to also see specific analytics across all of your funnels, forms and surveys.

Email / SMS Lead Magnet Wording

Step-by-step Guide

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MEMBERSHIP SITES

This section allows you to build courses and communities to help you nurture leads into clients but also paid versions that can help streamline aspects of your service delivery.

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DATA REPORTING

In addition to the 'Overview' section this section supplies even more specific data on how your business is performing from sales calls through to mirroring your paid ads manager account to help you manage paid advertising all in one place.

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EDUCATION HUB

Upon creating your SystemisedToScale account you will have been emailed your Education Hub login details to access trainings on maximising the system in addition to bonus plug and play automations. The more you understand The STS CRM™ the more you will be able to streamline and scale your business. Please follow the login link below and choose to reset your password if required.

Education Hub Login

TECH HELPLINE

We are here to help handle any questions or queries that you may have. If you ever need support please reach out to us via our WhatsApp Tech Helpline.

WhatsApp Tech Helpline

1-1 SUPPORT CALL

If you or your team ever feel the need for any clarification on The STS CRM™ please book a 15 minute 1-1 Support Call.

1-1 Support Call