



SMALL BUSINESS CRM STARTER GUIDE

**Your First 5 Moves to Getting the Right CRM,
Without Wasting Time or Money**

**A practical guide for small business owners who
are tired of losing leads, chasing follow-ups
manually, and guessing their way to revenue.**

If you've ever asked yourself...

- "Did we ever follow up with that lead?"
- "Why do deals just disappear after the first conversation?"
- "Which marketing efforts are actually working?"
- "Which are just expensive noise?"
- "Why does my CRM feel more like a chore than a growth tool?"

...you're not alone and you're not doing anything wrong. You're just trying to grow a business without a scalable sales and follow-up system in place.

A CRM (Customer Relationship Management system) isn't just software. When built correctly, it becomes the backbone of your sales process by helping you capture every lead, follow up consistently, track what's working, and create revenue predictability instead of chaos.

But here's the catch:

Most CRM setups fail before they even begin, not because of the tool, but because the business doesn't take the right first steps.

This guide will show you the first five moves you need to make before choosing, rebuilding, or optimizing a CRM so you don't drown in features, overpay for something you won't actually use, or end up with another system that collects dust.

Let's start by looking at where most CRM efforts go wrong so you can do it right from the start.

Why Most CRM Setups Fail And Why It's Not the Tool's Fault

Most small businesses don't fail with CRMs because they picked the "wrong platform." They fail because they tried to plug in a tool before they had a process.

What Happens



- A CRM is chosen based on popularity or price
- It's set up like a digital Rolodex or spreadsheet
- No clear sales process exists or everyone does it differently
- "We'll figure it out as we go" becomes "We never fully adopted it"
- Reporting is confusing or meaningless
- The business expects immediate ROI from incomplete setup

Why It Fails

- Without clarity on needs, even the "best" tool feels clunky
- You get storage, not strategy
- Data becomes inconsistent and unreliable
- Adoption drops, team reverts back to manual work
- Owners can't make informed decisions
- Frustration leads to abandonment



The Truth Most People Miss:

A CRM doesn't create clarity, it amplifies whatever process already exists (even if it's messy, inconsistent, or entirely undocumented).

That's why your first step isn't picking a tool, it's defining what the tool is supposed to power.

Your First 5 Moves

Before You Ever Set Up a CRM or Fix Your Current One

Before you choose a platform, subscribe to another tool, or rebuild your current system, you need clarity on how your sales and follow-up process actually works. These five moves give you that clarity and ensure your CRM is designed for growth, not confusion.

Step	What to Do	Why It Matters
1. Map your lead flow	Identify where leads come from, how they're qualified, and what happens next.	A CRM should follow your actual sales journey not force a generic one.
2. Decide what data actually matters	Choose the fields you truly need (e.g., source, stage, deal size, expected close date).	Prevents unnecessary fields and messy, unusable data.
3. Set a follow-up standard	Define timing (e.g., every lead gets contacted within 24 hours) and touch expectations.	Without consistency, automation and task generation won't work.
4. Define what makes a “qualified opportunity”	Agree on the criteria that moves a lead into a true sales conversation.	Creates pipeline accuracy and better forecasting.
5. Choose the KPIs you need visibility into	Decide which numbers you'll measure daily, weekly, and monthly.	This dictates the dashboards and reporting the CRM needs to support.

Once these five moves are complete, choosing or improving a CRM stops being overwhelming and becomes a clear, logical next step.

What a CRM Can Unlock in the First 30 Days

When your CRM is aligned with your actual business process (instead of working against it), results show up quickly. Within the first month, most small businesses experience measurable wins that turn chaos into clarity.

Here's what becomes possible within 30 days:

Result	What It Looks Like
No more forgotten leads	Every inquiry is automatically captured, assigned, and tracked.
Consistent follow-up without guessing	Sequences or reminders ensure every lead hears from you multiple times.
You see your sales pipeline clearly	You know what's pending, what's hot, and what's stuck.
Your effort shifts from chasing to closing	You spend more time on qualified leads instead of hunting for next steps.
You understand which marketing actually converts	You can finally measure ROI and not just impressions or clicks.
You forecast revenue with confidence	You stop guessing and start planning with clarity.

This is where scaling becomes possible because your process is now visible, repeatable, and measurable.

How Driven Ops Turns These Five Moves Into a Scalable CRM Engine

WHAT WE DO

- Map your real sales & follow-up process
- Choose or optimize your CRM platform (HubSpot, Salesforce, etc.)
- Automate follow-up so no lead gets ignored
- Build dashboards so you can see pipeline health & revenue trends
- Train your team for adoption and consistency



WHY IT WORKS

- Your CRM finally reflects how you actually sell
- You get a system that fits your stage of growth
- Your sales process runs even when you're busy
- Makes decision-making faster and more accurate
- Ensures the system is used daily, not abandoned

The result? A CRM that drives revenue instead of collecting dust.

Ready to Build a CRM That Actually Drives Revenue?

If you're serious about getting your CRM right the first time or fixing one that's underperforming, let's talk strategy.

Book a free 30-minute CRM Strategy Call and we'll help you:

- Identify gaps in your current sales and follow-up process
- Clarify what your CRM needs to support
- Understand which platform or setup makes the most sense for your stage
- Walk away with next-step recommendations you can act on immediately



THANK YOU!



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