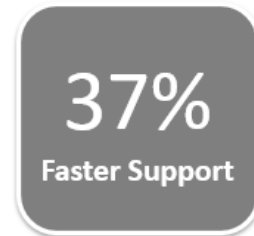


CRM Benefits & Best Practices Summary



Why Using a CRM Matters: Companies that effectively use CRM software see higher sales and stronger customer relationships. It's a growth investment – by centralizing and analyzing customer data, you can make better decisions and ultimately drive more revenue. Plus, modern CRMs like HubSpot are available at low or no cost, putting enterprise-grade capabilities within reach of startups and small businesses.

- **Centralized Customer Info:** All your contacts and communications in one database, accessible to your whole team (no more scattered inboxes). This provides a 360° view of each customer, helping you know them better and personalize service.
- **Better Organization & Follow-Up:** Track leads through your sales pipeline with defined stages and automated follow-up reminders so you never forget to check in. An organized CRM means smoother sales processes and fewer lost opportunities.
- **Marketing Integration:** Segment customers for targeted marketing (e.g. send newsletters or promos to the right people) and track engagement like email opens or website visits. This helps you focus on campaigns that generate real results.
- **Improved Customer Service:** Log customer inquiries and issues in the CRM to ensure timely responses. With full context visible, you can resolve problems faster and keep customers happy, boosting retention.
- **Time-Saving Automation:** CRMs reduce manual data entry by automatically logging emails, calls, and form submissions. They can also automate tasks (such as creating follow-up tasks or sending welcome emails), freeing you to concentrate on high-value activities.
- **Best Practices:** Set clear goals for how you'll use the CRM (e.g. "improve response time by 50%"), train your team so everyone is comfortable, and commit to using the system consistently. Keep data clean (merge duplicates, keep info updated) and start with a simple setup – add advanced features gradually as needed. Align marketing & sales efforts in the CRM by sharing insights and feedback between teams.

If getting started seems to be hard; there is help. We've done it all before: from figuring out how to clean up bad data, to migrating, adding in automations, connecting your systems together, and leveraging AI in your marketing strategy, the team at Sixth City Tech and Sixth City AI have the resources you need to get a strategy and to get moving.

Just reach out to us: info@sixthcityai.com | 216-220-9261 | www.sixthcityai.com