<u>Time is Money: 5 Ways an Easy CRM Can</u> <u>Help You Protect Your Most Valuable</u> Asset

written by Vicky Barry | July 28, 2023



As <u>Benjamin Franklin</u> once said, "Remember that time is money." In the world of business, this couldn't be more accurate. But let's add a little twist to it: "Remember that time is money... and you don't have to be a time-traveling wizard to manage it well!"

1. Prioritize Your Tasks

"You may delay, but time will not."

- Benjamin Franklin

A CRM helps you prioritize your tasks based on their urgency and importance. It's like having a personal assistant who's always reminding you, "Hey, this task is crucial, and it's due tomorrow. Get on it!"

2. Automate Repetitive Tasks

"I always wanted to be someone, but now I realize I should have been more specific."

- Lily Tomlin

Why waste time on repetitive tasks when a CRM can do it for you? From sending follow-up emails to updating customer records, automation is the secret sauce to being more specific with who you want to be: a successful business owner, not a repetitive task robot!

So, you've got your shiny CRM set to autopilot, and suddenly, you've got all

this free time! What to do? Well, you could try learning a new language, picking up that guitar that's been gathering dust, or even going on that vacation you've always dreamt about! □□ Or, you know, you could just use the time to focus on the bigger picture — strategic planning, market expansion, product development, world domination — the fun stuff! After all, no one ever said on their deathbed, "I wish I had sent more manual follow-up emails." □

3. Streamline Communication

"I don't need time. What I need is a deadline."

Duke Ellington

With a CRM, every communication is tracked and stored in one place. It's like having a personal deadline setter that says, "This customer asked a question. You need to respond by this time." No more sifting through countless emails or sticky notes!

And the best part? You no longer have to play detective every time you need to find a specific client interaction. Remember the time you had to find that one email where the client promised to send in the missing documents? Yeah, those days are over! With CRM, you can locate all your customer communication faster than a toddler can find the most inopportune time to throw a tantrum.

[It's like your very own time machine, bringing back memories (or in this case, emails) in a snap! [

4. Improve Team Collaboration

"Alone we can do so little; together we can do so much."

Helen Keller

A CRM isn't just for you; it's for your team too. It helps everyone stay on the same page, preventing the classic "Oh, I thought YOU were doing that" scenario. Remember, a team that collaborates well is a team that saves time!

And let's face it, nobody enjoys those awkward moments when two team members have done the same task, or even worse, when a task has fallen into the workplace equivalent of the Bermuda Triangle. \square With a CRM, it's like having a virtual town crier that bellows, "All right, mates, this task is handled. Move along, there's nothing to see here!" \square Ensuring your team works together like a well-rehearsed symphony, not a garage band on their first rehearsal. \square

5. Gain Valuable Insights

"Time flies like an arrow; fruit flies like a banana."

With a CRM, you can generate reports to see where your time is going. Are you spending too much time on less profitable clients? Is one service taking up too much of your time? With these insights, you can make decisions that will help you manage your time more effectively.

In the grand theater of business, your CRM is like the director who knows exactly how to cast the characters. It's whispering, "Psst, you're spending way too much time wooing that one client who keeps complaining about the price. Maybe it's time to give the understudy a chance?" \[\subseteq \text{With these datadriven insights, you can perform a breathtaking juggling act, skillfully allocating your time where it'll make a standing ovation-worthy difference! \[\subseteq \subseteq \text{So, step into the limelight of productivity and let the applause roll in.} \]
Bravo!



To Wrap Up, Why Time Management is So Important in a CRM

Time management isn't just about working hard; it's about working smart. And with a CRM, you can do just that. So, remember:

"Don't watch the clock; do what it does. Keep going."

- Sam Levenson.

And let your CRM be the tool that helps you keep going, efficiently and effectively.

To wrap up our show, remember, being a time management virtuoso isn't just about breaking a sweat; it's about orchestrating your tasks in harmony.

And with a CRM, you're not just a conductor; you're Mozart, composing a symphony of productivity.

Your CRM is your loyal metronome, keeping the tempo while you jazz up the business world with your effectiveness.

Onwards and upwards, maestro!

7 Killer Things Your Business Software Should Have

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In our crazy, wild digital/social age, snagging the right business software is like grabbing the life preserver that keeps you from becoming shark bait. But, with the software sea teeming with so many species, how do you reel in the right one? Fret not, captain! We've got the treasure map leading to the 7 golden features your business software absolutely needs. Without them, you might as well walk the plank! Let's set sail towards success, savvy?

1. Manage Customers with a CRM

Customer Relationship Management (CRM) is the backbone of any successful business. A good <u>CRM</u> system helps you manage your customer interactions, track leads, and build strong relationships. It's like having a personal assistant who knows your customers as well as you do!

2. Make it easy to get payment with Simple Invoicing

Invoicing can be a tedious task, but it's crucial for maintaining a healthy cash flow. Your business software should have an invoicing feature that makes creating, sending, and tracking invoices a breeze. Say goodbye to manual calculations and hello to accuracy and efficiency!

3. Make it easy for Employees to Find Their Way with Route Optimization

If your business involves any kind of delivery or service calls, route optimization is a must. This feature ensures your team gets to their destination in the most efficient way possible, saving time, fuel, and frustration. It's like having a GPS that doesn't just give directions, but also finds the best route in real time.

4. Let Customers Upsell Themselves with a <u>Menu</u> <u>Selling System</u>

Upselling is an art, and a menu selling system can be your paintbrush. This feature allows you to present your customers with a menu of options, making it easier for them to choose additional services. It's a win-win: your customers get more value, and you increase your revenue.

5. Task Management and Reassignment

Keeping track of who's doing what can be a challenge, especially as your business grows. A task management feature allows you to assign tasks, track progress, and even reassign tasks as needed. It's like having a project manager in your pocket!

6. Link to Pay

In today's digital world, customers expect to be able to pay quickly and easily. Your business software should include a link to pay feature that integrates with popular payment platforms like PayPal, Venmo, and Google Pay. This not only makes it easier for your customers to pay, but also ensures you get paid faster.

7. Simplicity

Last, but certainly not least, your business software should be easy to use. You don't have time to spend hours learning a complicated system. Look for software that's intuitive and user-friendly. After all, software is supposed to make your life easier, not harder!

The Bottom Line

The right business software can transform your operations, boost your productivity, and drive your success. Make sure yours has these 7 killer features, and you'll be well on your way to achieving your business goals.

More on <u>Business Software</u>



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