

# The Tools of The Trade, a New Plumbers Guide

written by Vicky Barry | September 4, 2024



Hey there, budding plumber! You've taken your first steps into the mystical world of pipes, wrenches, and the occasional unexpected flood. Welcome! Today, we're not just talking about tools; we're diving into the heart of your new life's adventure. Let's explore "The Tools of The Trade" with a dash of humor, a sprinkle of wisdom, and a whole lot of practicality.

## The Plumber's Toolbox: Your New Best Friend

Imagine your toolbox as your own personal superhero utility belt. Each tool isn't just a piece of metal or plastic; it's a gadget with its own superpower.

- **The Adjustable Wrench:** Think of it as your Swiss Army Knife. It fits almost anything, but remember, it's not a hammer.
- **Pipe Cutters:** These are your precision lasers, slicing through metal like butter. No, they won't cut through your sandwich, but they'll make quick work of any pipe.
- **Plunger:** The unsung hero. It's not glamorous, but when you're facing a clog, it's your best friend. Treat it with respect; it's saved many a plumber's day.

## Must Have Tools in Your Plumbing Truck

Top 10 Tools Every Plumber Should Have in Their Van

Hey there, apprentice! Your van is like your mobile workshop, your Batmobile for battling plumbing woes. Here's your checklist for the top 10 tools you absolutely need to keep your plumbing game on point:

1. [Plumbers Adjustable Wrench:](#) This is your go-to for most jobs. It adjusts

to fit various sizes of nuts and bolts. Think of it as your plumbing multitool.

2. [Pipe Wrench for Plumbers](#): For those stubborn, larger pipes that need a bit more muscle. It's like bringing in the heavy artillery when regular wrenches just won't do.
3. [Toilet Plunger](#): The unsung hero of plumbing. It's not just for toilets; it's your first line of defense against clogs anywhere.
4. [Basin Wrench](#): Designed for reaching those hard-to-get-to nuts under sinks. It's like having an extra-long arm that can twist and turn.
5. [Pipe Cutters](#): For clean, precise cuts on pipes. It's your precision tool, ensuring no jagged edges that could lead to future leaks.
6. [Commercial Screwdriver Set](#): You'll need various types (Phillips, flathead, Torx) for different fixtures and screws. It's like having a set of keys for different locks.
7. [Tape Measure](#): For accurate measurements. Whether you're cutting pipes or planning layouts, precision is key.
8. [Plumber's Tape \(Teflon Tape\)](#): Essential for creating watertight seals on threaded pipe joints. It's like the glue that holds your plumbing together.
9. [Hacksaw](#): For cutting through plastic, metal, or even wood when needed. It's your versatile cutting tool.
10. [Auger \(Drain Snake\)](#): For those clogs that the plunger can't handle. It's like sending a spy down the drain to clear the way.

## Bonus Tools for the Well-Prepared Plumber:

- [Torpedo Level](#): For ensuring your pipes are installed level, preventing future issues.
- [Channel-Lock Pliers](#): For gripping and turning things that wrenches can't quite handle.
- [Flashlight](#): Because sometimes, you're working in the dark corners of someone's basement or under a sink.

## The Plumber's The Tools of The Trade

- **Organization**: Keep your tools organized. A cluttered van leads to lost time and tools.
- **Maintenance**: Regularly check and maintain your tools. A well-kept tool is a reliable tool.
- **Adaptability**: Sometimes, you might need a tool not on this list. Being adaptable and resourceful is part of the job.

## The Art of Tool Maintenance

- **Cleanliness:** After every job, clean your tools. Imagine eating with dirty utensils. Not pleasant, right? Your tools deserve better.
- **Storage:** Store them like you would your favorite video game collection. Organized, dry, and safe from harm.
- **Sharpening and Oiling:** Keep blades sharp and moving parts oiled. A well-maintained tool is like a well-oiled machine – it just works better.

## Why Tools Matter

- **Efficiency:** The right tool for the job means less time, less effort, and more success.
- **Safety:** Using tools correctly reduces the risk of injury. A slip with a wrench can be as painful as a slip with words.
- **Professionalism:** Your tools reflect your professionalism. A plumber with well-kept tools is a plumber who takes pride in their work.

## Your Journey with Tools

As you embark on this journey, remember:

- **Learn:** Each tool has a story, a history, and a purpose. Dive into that knowledge.
- **Respect:** Treat your tools with respect, and they'll serve you well.
- **Innovate:** Sometimes, you'll need to think outside the box. But always come back to the basics.

So, apprentice, as you fill your toolbox, remember, you're not just collecting tools; you're building a relationship with each one. They're your partners in this wild, wet, and wonderful world of plumbing.

#PlumbingTools #NewPlumber #ToolTales

---

# The Ultimate Plumbing Pro's Guide to Problem Customers

written by Vicky Barry | September 4, 2024



## The Plumber's Paradox: When the Customer's Wrong but You're Humming the 'Right' Tune

Alright, pipe wizards and drain whisperers, gather 'round the virtual toolbox for a tale as old as time, or at least as old as the first leaky faucet. Here's the scoop: **The Customer Is Not Always Right, But They Are Always the Customer.** Welcome to the murky waters of customer disputes with a wrench in one hand and humor in the other. [This is part of the 10 Essential Plumbing Tips Every Apprentice Must Know series](#)

### The Leaky Logic

Imagine this: You've just explained why turning the "magic water stick" (the shut-off valve) is necessary, but Mr. Customer insists, "Nah, it'll fix itself with a good ol' smack." Here's where you could argue, but remember, you're not just a plumber; you're a diplomat of the drainage world.

### Lesson 1: Smile and Nod

"Sure, sir, smacking pipes *did* work in the 1800s, but let's try this shiny new thing called 'technology'."

### The Case of the Clogged Truth

You've cleared the same sink for Mrs. Miggins thrice this month. She swears by her 'eco-friendly' disposal method of pouring bacon grease down the drain is the best way, and blames you for the fix not staying fixed.

Here's what's happening:

- **The Eco-Friendly Myth:** Mrs. Miggins believes she's doing the environment a favor by disposing of her bacon grease down the sink, perhaps thinking it's better than plastic or somehow biodegradable in the water system. She might have heard somewhere that hot water will keep the grease liquid enough to go down without issues.
- **The Grease Trap Reality:** In reality, bacon grease might go down the

drain smoothly when hot, but as soon as it cools, it solidifies, sticking to the insides of the pipes like glue. Over time, this builds up, creating a fatberg – a plumber's nemesis, which not only clogs her sink but can contribute to larger blockages in the sewer system.

- **Educational Opportunity:** Each visit gives you a chance to educate Mrs. Miggins. You explain that while her intentions are good, the method is flawed. Grease should be cooled and disposed of in the trash or, better yet, collected for recycling where facilities exist. You might humorously illustrate how grease in pipes is like cholesterol in arteries – neither ends well.
- **Solution Selling:** Beyond just clearing the clog, you could suggest alternatives:
  - **Grease Collection:** Show her how to pour cooled grease into a disposable container.
  - **Composting:** If she's truly eco-conscious, discuss how some greases can be composted in small amounts or used in making bird suet if appropriate.
  - **Preventive Maintenance:** Recommend a sink strainer to catch food particles and perhaps a monthly enzyme-based cleaner that can help break down minor grease buildup.
- **Building Trust:** Every interaction is a chance to build trust. You're not just fixing a sink; you're providing a service that includes education, prevention, and environmental care. This turns a repetitive problem into a relationship where Mrs. Miggins sees you not just as a plumber, but as an advisor on all things plumbing-related.
- **The Humorous Twist:** You might quip, "Mrs. Miggins, if sinks were meant to digest bacon, they'd come with bacon bits, not drain pipes." This light-hearted approach can make the lesson stick better than the grease.

By addressing the root cause with patience, humor, and education, you not only solve the immediate issue but also prevent future calls for the same problem, turning a frustrating cycle into a showcase of your professionalism and customer care.

## Lesson 2: Educate with a Grin

### Situation: The Case of the Over-enthusiastic DIYer

**The Scene:** You're called to the home of Mr. Thompson, an enthusiastic but inexperienced DIYer who decided to upgrade his bathroom. He attempted to install a new showerhead but ended up with a fountain in his bathroom, as he didn't quite understand the concept of water pressure or how to properly seal connections.

**The Problem:** Upon arrival, you find water spraying everywhere, and Mr. Thompson is soaked, frustrated, and surrounded by a collection of tools, none

of which he seems to have used correctly. He's embarrassed and ready to defend his attempt, insisting he followed a YouTube tutorial.

## **Your Approach – Educate with a Grin:**

1. **Initial Reaction:** Instead of sighing or showing frustration, you enter with a grin, saying, "Wow, Mr. Thompson, looks like you've started your own indoor water park! Let's see if we can turn this into a more controlled splash zone."
2. **Assessment with Humor:** As you assess the damage, you might say, "You know, they say 'go big or go home,' but in plumbing, we aim for 'go small and keep it all in the pipes.'"
3. **Educational Banter:** While fixing the issue, you explain what went wrong in a light-hearted way, "See, this seal here is like the secret handshake of plumbing. If you don't get it just right, it's going to tell all the water to come out and play where we don't want it to."
4. **Teaching Moment:** You show him how to properly seal the connections. "Here's a trick, we twist until it feels like a firm handshake, not too loose, not crushing bones. Just right."
5. **Empowerment:** After fixing the immediate issue, you leave him with some basic tips for next time, "Next time you feel like channeling your inner plumber, remember, water pressure is like a cat; it'll find any way out if you give it a chance. But here's how you can keep it in check..."
6. **The Closing Grin:** As you pack up, you might add, "You've got the spirit, Mr. Thompson. With a bit more practice, you'll be installing showerheads with your eyes closed. But maybe keep them open, just for safety."

## **By educating Mr. Thompson with a grin, you:**

- **Diffuse the tension:** Laughter or a light-hearted approach can make the situation less embarrassing for him.
- **Provide value:** He learns something useful, potentially saving him from future mishaps.
- **Build rapport:** Instead of feeling scolded, he feels supported, which can lead to him calling you for future jobs or recommending you to others.
- **Encourage proper DIY:** By showing him the right way without belittling his effort, you encourage safer and more effective DIY attempts in the future.

This approach not only fixes the immediate plumbing issue but also builds customer loyalty through education delivered with empathy and humor.

## **Lesson 3: Solve and Soothe**

"Well, we've exorcised the ghost with a new flapper. But if it's spirits you're worried about, maybe keep some holy water next to

the plunger.”

## **Situation: The Midnight Leak Crisis**

**The Scene:** It’s 11 PM on a cold winter night when you receive an urgent call from Mrs. Alvarez, a single mother with two young children. Her basement is flooding due to a burst pipe, and she’s in a panic, worried about water damage, the safety of her kids, and the potential cost.

**The Problem:** Upon arrival, you find a pipe has indeed burst due to freezing temperatures, and water is gushing into the basement, which is starting to resemble a small swimming pool. Mrs. Alvarez is on the verge of tears, overwhelmed by the situation.

## **Your Approach – Solve and Soothe:**

1. **Immediate Action with Reassurance:** You start by quickly locating and shutting off the main water valve, saying with a calm smile, “Alright, the water’s taking a break now. Let’s show this leak who’s boss.”
2. **Assess and Explain:** While assessing the damage, you explain in simple terms what happened, “Looks like Jack Frost got a bit too playful with your pipes. But don’t worry, we can fix this up no problem.”
3. **Solution-Oriented:** You outline the steps you’ll take: “First, we’ll get this water out, then we’ll replace the burst section of the pipe. I’ll have you dry and cozy in no time.”
4. **Empathy in Action:** Knowing she’s worried about the kids, you might say, “How about we set up a little dry island for the kids with some towels and blankets? They can even have a ‘camping adventure’ while we sort this out.” This helps distract and comfort the children, reducing their mother’s stress.
5. **Work with Encouragement:** As you work, you keep the atmosphere light, “You know, in plumber’s school, they said we’d get to play with water, but they never mentioned it would be this much fun.” This humor helps to soothe her anxiety.
6. **Aftercare Instructions:** Once the pipe is fixed and the water pumped out, you give her advice on preventing future freezes, perhaps with a chuckle, “Let’s not give the pipes any more cold surprises. Here’s how we can keep them warm and toasty.”
7. **Cost Transparency:** You address her financial concerns by discussing the costs upfront, offering any possible solutions or payment plans if necessary. “Let’s talk numbers. Here’s what we’re looking at, but I’ve got a few tricks to keep costs down where we can.”
8. **Follow-Up Offer:** Before leaving, you reassure her, “I’ll give you a call tomorrow to make sure everything’s still dry and happy. And if Jack Frost decides to visit again, you know who to call.”

**By solving the immediate problem while soothing Mrs. Alvarez’s**

## worries:

- **You address the emergency:** The leak is fixed, preventing further damage.
- **You provide emotional support:** Through empathy and humor, you help manage her stress during a crisis.
- **You build trust:** By being transparent about costs and offering aftercare, you show that you're not just there for the job, but for the client's peace of mind.
- **You ensure customer satisfaction:** This approach likely turns a distressing situation into a positive customer service experience, encouraging loyalty and word-of-mouth referrals.

This method not only fixes the plumbing issue but also reinforces your role as a reliable, caring professional in the eyes of your customer.

## Lesson 4: Value with Valor

- "I see your point, but unlike a space shuttle, I make house calls, and I don't require a launch pad, just a parking spot."

### Situation: The High-Stakes Bathroom Renovation

**The Scene:** You've been hired by Mr. and Mrs. Chen, a couple who've decided to renovate their master bathroom into a luxury spa-like retreat. They've invested a significant amount of money into high-end fixtures, tiles, and a custom glass shower. However, halfway through the project, they're getting cold feet about the costs, particularly after an unexpected expense cropped up elsewhere in their home.

**The Problem:** The Chens are now questioning the value of continuing with the high-end materials versus scaling back. They're worried about overspending, and their anxiety peaks when they see the invoice for your labor and the custom parts ordered.

### Your Approach – Value with Valor:

1. **Acknowledge Their Concerns:** You start by validating their feelings, "I understand this renovation is a big investment, and unexpected costs can really shake things up."
2. **Reaffirm the Vision:** You remind them of their initial vision, "Remember, we're not just installing a bathroom; we're crafting your personal retreat, a daily escape. Quality here means longevity and satisfaction every time you step in."
3. **Detailed Breakdown:** You go through the invoice with them, explaining each cost with confidence:
  - "This custom shower glass isn't just any glass; it's safety



tempered, designed to last decades without losing clarity or integrity.”

- “The eco-friendly, water-saving toilet might be pricier now, but it’ll save you on water bills and is better for the planet.”

4. **Highlight Expertise:** You emphasize your expertise and the care taken in installation, “My team and I ensure every piece is installed to perfection. This isn’t just about fitting parts; it’s about creating a seamless experience where nothing goes wrong for years to come.”
5. **Value Over Price:** You discuss the long-term value, “Think of this as buying peace of mind. Cheaper alternatives might save money now but could lead to leaks, cracks, or inefficiencies that cost more in the long run.”
6. **Offer Solutions, Not Problems:** If they’re still concerned, you propose adjustments that don’t compromise quality but might adjust scope:
  - “If we’re looking to adjust, let’s consider where we can streamline without losing the luxury feel. Perhaps we use the high-end tiles as accents rather than for the entire floor.”
7. **Valor in Assurance:** You stand by your work, “I stand behind every fitting, every tile. If in five years, you’re not still in love with this bathroom, I’ll be surprised, but I’ll be here to make it right.”
8. **Future Benefits:** You might add a touch of forward-thinking, “And when it’s time to sell, homes with custom, high-quality renovations like this often see a better return on investment.”

## By demonstrating value with valor:

- **You reassure the client:** They feel their investment is justified by the quality and expertise they’re receiving.
- **You maintain the integrity of your work:** By not immediately jumping to cost-cutting, you uphold the standard of your service.
- **You offer strategic compromises:** If necessary, you find ways to adjust without undermining the project’s value.
- **You build a lasting relationship:** Through transparency and confidence in your work, you not only secure the current job but potentially future referrals and projects.

This approach not only salvages potentially wavering customer confidence but also positions you as a plumber who brings both skill and integrity to the table, ensuring clients see the true value in their investment.

## Lesson 5: Fix with Finesse

“Looks like you’ve started an impressive water feature! Shall we turn this into a professional job, or are we aiming for a Venice theme?”

### Situation: The Luxury Loft’s Leaky Faucet Fiasco

**The Scene:** You’re called to a high-end loft apartment owned by Ms. Harper, a high-profile interior designer known for her meticulous taste. She’s hosting an important event in a week, showcasing her latest design project, but there’s an issue: a designer faucet in her showcase bathroom has started leaking, threatening to undermine the perfection she strives for.

**The Problem:** The faucet is a rare, imported model, and the leak is not just a drip but has the potential to escalate, potentially damaging the custom marble countertop or the art piece displayed nearby. Ms. Harper is visibly upset, not just about the leak, but about the timing and the potential embarrassment in front of her elite guests.

### Your Approach – Fix with Finesse:

1. **Acknowledge the Urgency:** You start by recognizing the importance of the situation, “Ms. Harper, I understand how crucial this event is for you, and this faucet issue is unacceptable. Let’s fix this with the elegance it deserves.”
2. **Quick Assessment:** You examine the faucet with care, ensuring not to disturb the aesthetic setup. “This is indeed a fine piece. I’ll treat it with the respect it warrants.”
3. **Solution with Style:** Knowing the original part might take too long to arrive, you propose a temporary yet stylish solution:
  - “While we wait for the exact replacement part, I can install a temporary valve that matches your decor. It’ll be seamless, and no one will notice it’s not the original.”
4. **Precision in Execution:** You work with precision, using tools that won’t scratch or damage the surrounding area. You might even use a soft cloth to lay your tools on, showing your attention to detail.
5. **Educate with Elegance:** While working, you explain your process in a way that engages her, “This valve here is like the jewelry of plumbing; it needs to fit perfectly to shine. I’ll ensure it’s as unobtrusive as a shadow.”
6. **Test with Tact:** After fixing the leak, you test the faucet multiple times, ensuring no droplets escape, perhaps saying, “Let’s make sure this faucet performs as beautifully as it looks.”
7. **Offer Assurance:** Before you leave, you assure her, “I’ll have the

original part expedited, and I'll personally ensure it's installed before your event. For now, this fix will hold court with the best of them."

8. **Follow-Up with Flair:** You leave her with a small, elegant toolkit (branded with your company logo), "Just in case of any minor adjustments, though I doubt you'll need it. And I'll check in a day before the event for a final touch-up."

## **By fixing the issue with finesse:**

- **You match the client's standards:** Understanding and respecting the luxury and aesthetic of the environment.
- **You provide a bespoke solution:** Tailoring your service to meet the unique needs of the situation, showing adaptability and creativity.
- **You maintain professionalism:** Your approach reassures the client that they are in capable, caring hands, thus preserving her peace of mind during a stressful time.
- **You enhance your reputation:** By handling the situation with such care, you not only solve the immediate problem but also likely secure future high-end clientele through Ms. Harper's recommendations.

This approach demonstrates that for a plumber, fixing a problem isn't just about stopping leaks; it's about doing so in a way that respects and complements the client's lifestyle and expectations.

## **Conclusion: Navigating the Waters of Customer Service in Plumbing**

In the nuanced world of plumbing, where pipes and personalities intertwine, the principle that "The Customer Is Not Always Right, But They Are Always the Customer" serves as a guiding light. This mantra reminds us that while customers may not grasp the complexities of plumbing, their perceptions, comfort, and satisfaction are paramount. Through scenarios like the luxury loft's leaky faucet, we see that effective plumbing solutions require not just technical skill but also empathy, education, and sometimes, a touch of creativity. By approaching each job with professionalism, patience, and a bit of humor, plumbers can turn potential conflicts into opportunities for demonstrating value, building trust, and fostering long-term relationships. In plumbing, as in all service industries, the true measure of success isn't just in fixing leaks but in ensuring the customer feels heard, respected, and valued, regardless of their initial understanding of the problem.

**"To give real service you must add something which cannot be bought or measured with money, and that is sincerity and integrity."**

– [Douglas Adams](#), Author of ["The Hitchhiker's Guide to the Galaxy"](#).

*(Source: Although not directly from his books, this reflects his philosophy on life and service)*

---

# The Ultimate Plumber's Toolkit: Never Leave Without Spare Parts

written by Vicky Barry | September 4, 2024



Alright, pipe wranglers, gather 'round the toolbox, because we're diving into one of the golden rules of the plumbing game: **Always Have Spare Parts on hand**. Now, you might think, "I've got my wrench, my tape, what more could I need?" Well, let me paint you a picture with a splash of reality as part of our [10 Essential Plumbing Tips](#)

**Here is the problem:** You're elbow-deep in what was supposed to be a simple leaky faucet fix. You've got the customer's trust, the bathroom's been turned into your temporary workshop, and then it hits you – the washer you need looks like it's been through a war, or worse, it's the wrong size. You could make a run to the hardware store, but that's like admitting defeat, not to mention it turns your quick job into an epic saga.

Here's where the magic happens: You reach into your van, that treasure chest on wheels, and pull out a box labeled "The Usual Suspects." Inside, there's an array of fittings, a collection of washers in every size, and those common repair parts that are as essential to you as coffee on a Monday morning.

## **Why Spare Parts are Your Secret Weapon:**

1. **The One-Trip Wonder:** Nobody likes a sequel when it comes to plumbing jobs. With spares on hand, you wrap up in one go, leaving you free to tackle the next call or, dare I say, enjoy some downtime.
2. **The Hero Factor:** When you pull the exact part needed from your van like a magician pulling a rabbit from a hat, you're not just fixing a pipe;

you're saving the day. That's the kind of service that gets you glowing reviews and word-of-mouth referrals.

3. **Time is Money, Friend:** Every minute you spend driving back to the store is a minute not billed. Spare parts mean you're efficient, which translates to more jobs per day and, consequently, a fatter wallet.
4. **Preparedness is Next to Godliness:** In the world of plumbing, Murphy's Law is more like Murphy's Plumbing Code – if it can leak, it will, and at the worst possible time. Your stock of spares is your shield against this chaos.
5. **Customization and Compatibility:** Not all parts are created equal. Sometimes you need that oddball fitting or a washer with just the right thickness. Having a variety means you're ready for whatever weird and wonderful plumbing systems the world throws at you.

So, stock up on those spares of us we use [FW Web for our plumbers supplies](#). Organize them, cherish them, maybe even give them names if that's your thing. But most importantly, have them ready. Because in the plumbing biz, being prepared isn't just about avoiding extra trips; it's about being the master of your craft, the lord of the leaks, the duke of the drains.

Remember, a plumber with spare parts is like a knight with a sword – always ready for battle. And in this game, every closed valve, every sealed pipe, is a dragon slain. Keep your van stocked, your tools ready, and your spare parts plentiful. Here's to turning every job into a one-trip triumph!

---

## [Want CRM Success? Train Your Team Immediately!](#)

written by Jude Campbell | September 4, 2024



For any CRM system, like Selling Lane's, to really thrive, regular team training is not just beneficial—it's absolutely critical. Imagine this: your CRM system is a high-performance race car, and your team members are the drivers. Without proper driving lessons, how can you expect to win any races? This analogy brings us to the importance of continuous training in leveraging CRM Success to boost customer relationships and meet ambitious targets.

# Why Regular Training Matters for CRM Success

First, let's talk about the rapidly evolving landscape of CRM technology. CRM systems today are far more sophisticated than they were even five years ago, incorporating AI, machine learning, and advanced data analytics. This rapid evolution can leave teams behind if they're not regularly updated on the latest features and best practices.

Training ensures that every team member is not only up-to-date, but also proficient in using the tools effectively. It's about transforming your team from being just users of a system to being champions of your technology, capable of extracting every ounce of value from the system.

## Creating a Culture of Continuous Learning

Selling Lane needs to foster a culture where learning is ongoing. Continuous improvement in CRM skills can lead to better customer relationship management and a deeper understanding of customer needs and behaviors. Regular training sessions can also be a great way for team members to share insights and challenges, further enhancing collective knowledge and strategies.

A learning culture supports not only individual growth but also organizational agility, allowing your business to adapt quickly to new opportunities or market changes.

## Training Formats That Work

Not all training formats are created equal, and what works for one team might not work for another. Here are a few effective ways to keep your team's CRM skills sharp:

1. **Workshops and Webinars:** These can be done in-house or with the help of external experts. They're great for deep dives into specific features or updates in the CRM software.
2. **E-Learning Modules:** Online courses allow team members to learn at their own pace and according to their own schedule, which is great for busy teams.
3. **Regular Updates:** Sometimes, small bites of information are easier to digest. Quick, regular updates or bulletins about new features or tips can be very effective.
4. **Peer-to-Peer Learning:** Encourage team members who excel in certain areas to lead small group sessions or one-on-one training to help bring their colleagues up to speed.
5. **Real-time Feedback:** Incorporate CRM training into day-to-day work with real-time feedback. This helps team members immediately apply what they've learned in practical, real-world scenarios.



## Measuring the Impact of Training

To really understand if your training efforts are paying off, you need to measure their effectiveness. Set clear metrics for improvement post-training. This could be in the form of increased customer satisfaction scores, higher sales conversions, or more effective data management. Selling Lane, for example, could monitor the monthly viewer count or the engagement rate before and after the training sessions to gauge their impact.

## Integrating Training with Business Objectives

Link your training programs directly to your business goals. For instance, if the aim is to engage 20,000 viewers per month, tailor your CRM training sessions around strategies that enhance customer engagement and retention. It's also vital to communicate to your team why these trainings are important and how they tie into the larger business objectives. This helps in securing buy-in and more enthusiastic participation.

## CRM Success Summary

In conclusion, for CRM systems like Selling Lane's to deliver on their promises, regular team training is indispensable. It's not just about keeping up with technology—it's about mastering it to deliver real business results. Cultivating a culture of continuous learning and ensuring that training is engaging and aligned with business goals can transform how your team interacts with your CRM, leading to greater success and closer to achieving ambitious targets.

Remember, in the race to CRM success, regular training is your pit stop strategy—it keeps your race car running at full speed, ensuring you're always ahead of the competition.

The Easy CRM FOR EVERYONE Track leads, close deals,  
turn customers into fans [Start Now - It's Free](#) Your Business, Amplified







---

## How a CRM with Google Calendar Makes You Money

written by Jude Campbell | September 4, 2024



The good news? CRM platforms like Selling Lane can seamlessly integrate with Google Calendar. Setting it up is usually a breeze, and many platforms offer free trials so you can test-drive the system before committing.

---

## [Stop The Mix-Ups! How To Organize Your Customer's Like A Pro](#)

written by Jude Campbell | September 4, 2024



No More Mix-Ups: Imagine calling Mrs. Johnson for a roof repair, only to find out she wanted the basement flooded (hopefully not!). Clean info means you reach the right person, every time. No wasted time, just happy customers.

---

## [How to Add Contact TAGS and Company TAGS to CRM](#)

written by Jude Campbell | September 4, 2024



In [Selling Lane CRM](#), adding contact tags is like highlighting your customers or companies. It helps you group them by something special or important, making it easier to find them easily. Company tags work the same way, with one advantage, by categorizing the whole company, all of the contacts within the company will also display.

Tags allow you to categorize, highlight, and quickly identify specific attributes or interactions with your customers or the companies you do business with.

## Adding Contacts Tags



- Search for the contact and click into the contacts details
- Click + Tag
- Add a new tag or pick from the pull down
- You can add as many tags as needed to a Contact
- When you search for that tag, it will bring up all contacts and companies with that tag.

## Adding Companies Tags

- Search for the Company and click into the companies details
- Click + Tag
- Add a new tag or pick from the pull down
- You can add as many tags as needed to a company
- When you search for a company tag it will bring up all contacts in that company.

**Here are some specific tag suggestions for contacts and companies:**

### Contact Tags:

- **Lead type:** Lead, prospect, customer, partner, vendor, etc.

- **Industry:** Finance, healthcare, technology, retail, etc.
- **Company size:** Small business, medium-sized business, enterprise
- **Job title:** CEO, CFO, CTO, VP of sales, VP of marketing, etc.
- **Location:** City, state, country
- **Engagement level:** Active, inactive, engaged, disengaged
- **Source:** Website, referral, event, social media, etc.
- **Interest:** Product A, product B, product C, etc.
- **Purchase history:** Product purchased, date of purchase, amount spent

#### Company Tags:

- **Industry:** Finance, healthcare, technology, retail, etc.
- **Company size:** Small business, medium-sized business, enterprise
- **Location:** City, state, country
- **Revenue:** \$1M-\$10M, \$10M-\$100M, \$100M-\$1B, etc.
- **Number of employees:** 10-50 employees, 50-250 employees, 250+ employees
- **Growth rate:** High growth, medium growth, low growth
- **Customer segment:** Small business, medium-sized business, enterprise
- **Products or services:** Product A, product B, product C, etc.
- **Competitors:** Company A, company B, company C, etc.

## Short explanation video, how to add contact tags and company tags

Try Free for 31 Days [Get Sellinglane CRM](#) No credit card needed to try

---

## [How to add additional contacts to a company](#)

written by Jude Campbell | September 4, 2024



- Search for the company
- Once found, click on the company or added it from scratch
- Then click add contact on the right-hand side
- Add the additional contact and you're good to go

below is a brief video explaining the process mentioned above.

## **Short explanation video, how to add additional context to a company**

---

## **[How to Add a Customer and Company to Selling Lane CRM](#)**

written by Jude Campbell | September 4, 2024



- First step is always to search for the customer first to make sure that you already haven't added him or her into the CRM.
- After you've searched and found the customer, the software will automatically allow you to add first name last name, etc.
- Once the basic details are in, go back in and tweak the customer, adding details like cell phones, additional email, addresses, physical addresses company, names, and titles at the company.
- Once you've added the company, you can edit that information and add more details such as business address, business URL, etc.

below is a brief video explaining the process mentioned above.

## Short explanation video, on how to add a company and customer

---

## How to Sign in to Selling Lane CRM

written by Jude Campbell | September 4, 2024



- Go to Selling Lane CRM : <http://sellinglane.com/>
- Click on the Sign-In menu item:



- Use the Sign in with Google button or
- log-in with your email and password
- and you're done

## Short explanation video, on how to Sign Into Selling Lane