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CRM & Follow-Up System

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This guide explains what the tool produces, how to use the output, and what to watch for. The actual output (draft/report) is generated on the tool page.

Background

Designs a CRM and follow-up system — lead pipeline and stages, follow-up automation, and past-client re-engagement (anniversaries, new occasions, referrals) — so no enquiry slips and past clients bring repeat/referral work. Use it to organise sales. For bookings use the Booking & Enquiry Management tool.

Purpose of this tool & output

Never let a lead or past client go cold

How the output is used

Use it to never let a lead or past client go cold — a CRM and follow-up system that nurtures enquiries and repeat bookings.

Important cautions

Follow up quotes persistently (many bookings are lost to no follow-up) and re-engage past clients — a wedding couple becomes newborn/family/anniversary clients and a referral source. A simple CRM used daily beats a fancy one ignored.

Companion documents

- Booking & Enquiry Management
- Client Onboarding & Brief
- Client Consultation & Expectation Setting
- Client Communication Plan
- Cancellation & Rescheduling Policy
- Referral & Testimonial Capture

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