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Client CRM Setup Guide

Beauty, Wellness & Fitness

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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

Set up a client CRM for retention and personalisation — the data to capture (contact, visit history, services, preferences, spend, next-due), how to segment clients, the automations to run (reminders, birthdays, rebooking, win-back) and DPDPA-aware privacy. Fill in your details below.

Purpose of this tool & output

Organise client data to drive retention

How the output is used

Use the guide to organise client data to drive retention and personalised service.

Important cautions

AI-generated guide; handle personal data per DPDPA and with consent.

Companion documents

- Booking Software Selector
- Online Booking Setup Guide
- No-Show & Cancellation Policy
- Appointment Reminder Templates
- Digital Payments Setup Guide
- Review Generation System

This is AI-assisted guidance. Verify with a qualified professional before any binding decision. Fees, authorities and processes vary by state and change over time — confirm with your state authority.