CRM Updates and Tidy-Up
Briefing

This guide is designed to help you spot tasks that can be handed over to a VA, what Jessanol would usually need from you, and what the end result could look like.

HOW THIS HELPS

A CRM is only useful if the information in it is clear, current and easy to act on. When records are duplicated, incomplete or out of date, follow-ups get missed, enquiries go cold and the system becomes something people avoid rather than use.

Jessanol can help keep CRM information accurate, organised and easier to work with.

THIS IS USEFUL IF

This type of support may be useful if:

- [ ] Your CRM has become messy or inconsistent
- [ ] Contacts, companies or opportunities are duplicated
- [ ] Follow-up dates are missing
- [ ] Pipeline stages are unclear or out of date
- [ ] New enquiries are not being added consistently
- [ ] Notes from calls or emails are not being recorded
- [ ] You know the CRM could be useful, but it currently feels like another thing to maintain

WHAT JESSANOL CAN SUPPORT WITH

Jessanol can help manage and organise incoming emails so important messages are easier to find, track and respond to.

This may include:

- [ ] Adding new contacts or organisations
- [ ] Updating existing records
- [ ] Checking for duplicates
- [ ] Adding notes from calls or emails
- [ ] Updating pipeline stages
- [ ] Recording follow-up dates
- [ ] Tidying tags, categories or custom fields
- [ ] Helping identify gaps in the CRM setup or information

RECOMMENDED RHYTHM

This can be done weekly, monthly or as aone-off CRM tidy-up.

For example:

- Weekly updates for new enquiries and follow-ups
- Monthly CRM tidy-up
- One-off clean-up before a sales campaign
- Pipeline review support
- CRM reset after a period of inconsistent use

ACCESS LIKELY NEEDED

Jessanol will probably need:

- Access to the CRM
- Guidance on pipeline stages
- Guidance on contact types, tags and categories
- Naming conventions or field rules
- Access to source information, such as emails, notes, forms or spreadsheets
- Guidance on what should be updated, archived or left alone

IMPORTANT CONSIDERATIONS

Before starting, we will agree:

- What the CRM is being used for
- Which fields are important
- Which pipeline stages or statuses should be used
- Whether Jessanol can update records directly
- What should be checked before changing
- What should happen with duplicates
- Whether any records can be archived or deleted

Records should not be deleted unless clearly agreed. Missing information should not be guessed. Client, contact and business information should be handled confidentially.

STEP-BY-STEP INSTRUCTIONS

1. Review the CRM area or records to be updated.
2. Check for new contacts, enquiries, clients or project updates.
3. Add or update records using the agreed fields.
4. Check for duplicates or incomplete information.
5. Add notes, follow-up dates or task reminders where needed.
6. Update pipeline stages or statuses if agreed.
7. Flag missing, unclear or conflicting information.
8. Suggest any simple improvements that would make the CRM easier to use.
9. Confirm what has been updated if required.

WHAT YOU NEED TO PROVIDE

To get started, you will usually need to provide:

- [ ] Access to the CRM
- [ ] A short explanation of how you currently use it
- [ ] Details of key fields, tags, stages or categories
- [ ] Any source information that needs adding or checking
- [ ] Guidance on what matters most for follow-up
- [ ] Examples of records that are correct
- [ ] Guidance on what should not be changed

You do not need to have a perfect CRM before asking for support. If it was already perfect, you probably would not be reading this bit.

WHAT YOU'LL GET BACK

You should have:

- Cleaner CRM records
- Fewer duplicates
- Better follow-up tracking
- Clearer pipeline information
- More consistent contact and company records
- A CRM that is easier to use and less likely to be avoided

If this sounds familiar, we can use this as a starting point to work out what support would be most useful. Contact me: jane@jessanol.com