Souck

GUIDE · AUTOMATION

A STEP-BY-STEP CRM SETUP GUIDE

Connect your enquiry form, CRM and email so leads are followed up on time and quotes do not slip through.

souckinc.com

October 2026

A CRM (customer relationship management system) keeps every lead, quote and customer in one place. For a trades business, it is the difference between following up on every quote and losing jobs because someone forgot to call back. This guide covers a simple setup.

STEP 1: MAP HOW A JOB COMES IN

Write down every way a lead reaches you: phone calls, website forms, emails, social media messages and referrals. Then write down what happens next, from first contact to paid invoice. That becomes your pipeline.

STEP 2: SET UP YOUR PIPELINE STAGES

Keep the stages simple and match them to how you already work.

- New lead
- Contacted
- Site visit booked
- Quote sent
- Won
- Lost (with a reason)

STEP 3: CAPTURE EVERY LEAD AUTOMATICALLY

Connect your website form so every submission creates a lead in the CRM. Forward your business email or use the CRM's email integration. For phone calls, log the lead before you hang up, or use a call tracking tool that connects to your CRM.

STEP 4: AUTOMATE THE FOLLOW-UPS

Automations should send the message you would send yourself, at the moment you would have sent it if you had time.

- An instant reply when a form is submitted, saying when you will call
- A reminder to follow up two days after a quote is sent
- A second follow-up a week later if there is no answer
- A review request when a job is marked complete

STEP 5: KEEP IT CLEAN

Pick one person responsible for the CRM each week. Close old leads as lost with a reason, merge duplicates and check that every quote has a next step. A CRM is only useful if the information in it is current.

STEP 6: REVIEW THE NUMBERS MONTHLY

Look at how many leads came in, where they came from, how many became quotes and how many quotes were won. Those numbers show where to spend your marketing time and money.

> NEED A HAND?
>
> Souck helps trades and service businesses with websites, search, advertising, branding and business systems. Book a free conversation at souckinc.com/book or call 1-888-218-9374.