Your CRM is where every person you do business with lives — leads, clients, suppliers and the history you build with each of them. If you are keeping any of that in a spreadsheet or an inbox today, this is what replaces it.

What it holds

- **Contacts** — everyone you deal with, with notes, tags and a full history of what has passed between you
- **Clients** — group contacts under the business they work for, so you can see the whole relationship rather than one person at a time
- **Pipeline** — a visual board of the deals you are working on, moved along stage by stage
- **Projects** — the work itself, tied back to the client it belongs to
- **Quotes, invoices and contracts** — priced, sent and tracked without leaving the record they belong to
- **Calendar and appointments** — bookings and meetings alongside everything else you know about that person

Your first hour

1. Start with **Contacts** and bring in the people you already work with — you can import a list rather than typing them in.
2. Group the ones who share an employer under a **Client**, so their history sits together.
3. Open **Pipeline** and add the deals currently in flight. Drag one between stages to see how it moves.
4. Create a **Quote** for a live opportunity. When it is accepted it becomes an invoice, so nothing is retyped.
5. Look at the **Clients Dashboard** at the end of the week — it shows what moved, what is waiting, and what is overdue.

Tips

- Log calls and meetings as you go. The value of a CRM is the history, and history is only built by small entries made at the time.
- Tag contacts by how you met them. It is the quickest way to learn which of your channels is actually working.
- A quote, an invoice and a contract all point back to the same client record — start from the client, not from a blank document.