LoftyBiz 055 · A Simple CRM: Never Lose a Lead or Forget a Customer Again · loftybiz.net

Simple CRM Starter Sheet

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1. One list, seven fields

Put every lead in one place, whatever channel it came from, on the day it arrives. Keep only the fields you will use. Add a field only when you will use it every week.

Field	What to write
Name	The person or business
How to contact them	The channel you already use (no extra details needed on this sheet)
Source	Where they came from (form, chat, call, social, referral)
What they want	A short note, in their words if you can
Rough value	A round figure, if you know it
Next step	The next action you will take
Date for the next step	A calendar date, not “soon”
Optional: event or job date	Add this only if your work runs on a date, as Sokha did

2. Five clear stages

Write one sentence for each stage and share it, so the words mean the same thing to everyone.

Stage	One-sentence meaning
New	The enquiry is on the list and nobody has replied yet.
Contacted	You have replied, but no written price has gone out.
Quote sent	The price is in writing with the customer, not only discussed.
Booked	They have agreed and the job or event is yours.
Lost	There is no next step. Mark it, do not leave it hanging.

3. The daily and weekly rhythm

Ten minutes every morning: reply to every new lead, and work through today’s next steps. New enquiries get a reply the same day, ideally within the hour. Twenty minutes every Friday: look at every open lead, flag anyone with no activity in fourteen days, and agree one next action and a date — or mark it lost. After every sale, add what was done, any measurements or dates that matter, and the first service or follow-up check. Watch two numbers: leads without a next step (close to zero) and the share of quotes that become jobs.

4. Your first hour

Choose one place, even a spreadsheet. Add the seven fields and your stages. Go through your inbox, chats and phone, and put every open lead on the list with a next step and a date. Book ten minutes for tomorrow morning and twenty minutes for Friday.

5. Worked examples (illustrative only)

Sokha runs a wedding and event photography studio in Phnom Penh. After putting every lead in one list, enquiries with no reply dropped from about one in three to almost none, and bookings went from about one in six to about one in four. That was roughly eleven extra weddings in a season, at about $1,400 each.

Amir runs a window and door installation company in Sarajevo. Follow-ups on old quotes won back nine jobs, worth about $18,000. Quotes that became jobs went from about one in five to about one in three. Leads without a next step went from more than sixty to under five.

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Keep the list in Systex, our own product, at loftybiz.net. Click the link in the description of the video.