



RESOURCE  
MARKETING

# HOW TO SELECT THE BEST CRM SYSTEM

Every business needs a customer relationship management (CRM) system. This is a system that helps you to have clarity and organization in business.

## ➤ Benefits

- Build confidence
- Improve professionalism
- Increase client satisfaction
- Retain clients
- Increase company revenue
- Reserve time

## ➤ Features

- Lead management
- Online booking
- Bookkeeping
- Prospective client organization
- Workflow automation
- To-Do list tracking
- Time keeping
- Professional quotes, questionnaires
- Contracts and contract signing
- Calendar integration
- Schedule emails

## How to Select

- **Understand the needs of your company.**
- **Use a CRM system that is easy to use.**
- **Select a CRM system that gives you options.**
- **Choose a CRM platform that uses language you can understand.**

PREFERRED CRM SOFTWARE\*

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## Meet Tiffany

Workflow Strategist at Clear Resource Marketing where coaches and consultations discover how to organize their business. [Schedule a Clarity Call consultation today.](#)



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