

STEPS TO CRM SUCCESS

Step 1

[Setup Email IMAP integration](#) so IO can match emails from your email account to customers and leads as well as [track last contact and activity stats](#).

Step 2

Learn to use the [task manager](#) to set reminders for sales follow-ups.

Step 3

Put in best practices to follow-up with your current customers and leads by [setting up CRM filters](#).

Step 4

Learn to [use the CRM tab](#) where you can see emails, tasks, calls, and journal entries to track communication with your customers.

Step 5

Prospect for new leads with a [marketing plan that incorporates the CRM tools](#).

Questions?

Always feel free to contact us:

sales@inflatableoffice.com

Or

440-385-4080