



WHAT YOU NEED TO KNOW

Masterclasses

JANUARY 2022

How To Create Incredible Relationships With Your Customers And Prospects Through A CRM with Taylora Payne from SpeakerFlow (chatting with Owen Fitzpatrick)

Over half of speakers don't have a CRM

Systems are like Science

They provide you with a consistent, predictable way of getting things done.

2 Lessons from the recent STATE OF THE INDUSTRY survey:

1. Overwhelm is an issue
2. We are confident about our ability to sell and market but are also stressed about it

A CRM (Customer/Contact Relationship Management) system helps us by

- a) reducing massive amounts of stress and frustration through repetitive tasks and duplications.
- b) improves our relationship with others by remembering important information about them
- c) makes sure you don't drop the ball by keeping clear track of everything

To become more systems minded:

Focus on one specific problem to start
Give yourself a quick win

EOS is a great system but more for people with >5 employees

SpeakerFlow combines with the EVENT CX Calendar function of Espeakers
(which is a speakers directory)

Speakerflow is built on ZOHOO ONE which is a web driven platform that offers
lots of different APPS for businesses

3 CRM HABITS

1. Create an Update Records (only backlog active ones)
2. Track all communication (ALL)
3. Set and COMPLETE Follow Up (implement tasks)
4. Set Sacred Space every day to use
5. Work on improving your life and business while using it

Managing VA's

Clearly Define what you want them to do
Do the process yourself multiple times
Clearly train them in the process and document it as an SOP (Standard
Operating Procedure) or Loom Video

Examples of stuff to delegate:

1. Researching Leads
2. Adding new Leads

Recommended a Book for Sales:

\$100 Million Offers Alex Hormozi

For more information on SpeakerFlow check out:

<https://speakerflow.com/crm/>