

DO YOU NEED A CRM, AND WHICH KIND?

A CRM is the list of every customer, enquiry and job in one place, with what happened last and what happens next. Most Surrey firms either do not have one or pay for one nobody updates. This sheet tells you in ten minutes which of three honest options fits, and two of them are not us.

A4 · PRINT IT · ANSWER WITH A PEN · 2026

STEP 1: THE ONE PROBLEM, IN YOUR WORDS AND YOUR MONEY

Last month about _____ enquiries came in. Roughly
_____ of them got a reply within an hour. About
_____ went quiet because nobody chased them. At about £
_____ a job, that is around £ _____ that walked out
of the door in one month.

If you cannot fill in the first three blanks, that is the finding. You do not know where your enquiries go, and no tool fixes that until you count them for one week. Verified job values if you need a stand-in: plumber call-out £80 to £150 (first visit only); new roof average £8,000 (range £4,000 to £19,000); podiatry £50 to £148 a visit with rebooking every 6 to 8 weeks.

STEP 2: THE DECISION TREE (TICK ONE BOX PER QUESTION)

LEFT COLUMN points to Option A

MIDDLE COLUMN points to
Option B

RIGHT COLUMN points to Option
C

1. HOW MANY NEW LEADS A WEEK? (CALLS, FORMS, MESSAGES, WALK-INS, ALL COUNTED)

FEW

☐

Fewer than 5

STEADY

☐

5 to 20

BUSY

☐

More than 20

2. HOW MANY PEOPLE TOUCH A LEAD? (ANYONE WHO ANSWERS, QUOTES, BOOKS OR CHASES)

JUST YOU

☐

1 person

A SMALL TEAM

☐

2 or 3 people

HANDS EVERYWHERE

☐

4 or more people

3. WHERE DO LEADS ARRIVE? (TICK EVERY SOURCE, THEN COUNT THE TICKS)

☐

Phone calls

☐

Website forms

☐

WhatsApp

☐

Email

☐

Facebook or Instagram messages

☐

Walk-in or referral by text

COUNT

☐

1 or 2 sources

COUNT

☐

3 sources

COUNT

☐

4 or more sources

How to read it. Mostly left: Option A. Mostly middle: Option B. Any tick in the right column, or phone is a source and nobody writes calls down: Option C. These are our rules of thumb from building these systems, not a law. If you are between two columns, start with the cheaper option and let the count in Step 1 tell you in a month whether to move up.

STEP 3: THE THREE OPTIONS, EACH GIVEN A FAIR HEARING

OPTION A: A SHARED SPREADSHEET AND WHATSAPP

WHAT IT MEANS

One shared Google Sheet. One row per lead. Columns: date, name, phone, source, what they want, next action, who owns it, status. A WhatsApp group where "rang Mrs Patel, quoting Friday" gets typed the moment it happens.

HOW YOU KNOW IT IS WORKING

Every lead has a row within the hour it arrives and a next-action date. On Friday you can read down the sheet and see nothing older than a week without a status.

WHERE IT FALLS DOWN

The moment two people touch the same lead. A call taken on the tools never reaches the sheet. Nothing reminds anyone, nothing follows up on its own, and the sheet dies the first busy fortnight.

RIGHT FOR

One person, fewer than 5 leads a week, one or two sources. It costs nothing, and for a lot of sole traders in Surrey it is the honest answer. Start here if you are unsure.

OPTION B: AN OFF-THE-SHELF TOOL

WHAT IT MEANS

A product such as HubSpot, Pipedrive, Zoho or a trade-specific job app. A pipeline board (enquiry, quoted, booked, done), reminders, email templates, a mobile app. Check whether the vendor's entry plan covers your number of users before paying for anything.

HOW YOU KNOW IT IS WORKING

The pipeline shows where every lead sits. The "no activity in 3 days" view is empty on a Friday. Quotes go out from the tool, so sent and opened dates are recorded without anyone typing.

WHERE IT FALLS DOWN

It is only as good as what gets typed in. Phone calls and WhatsApp messages do not log themselves, so within a month the real pipeline lives in people's heads again and the tool shows last month. Paying for the biggest tier because it has more features is the usual mistake.

RIGHT FOR

5 to 20 leads a week, 2 or 3 people, leads mostly by email and web form, and one person who will keep it tidy.

OPTION C: AN INTEGRATED SYSTEM

WHAT IT MEANS

The phone, the website forms, WhatsApp, email and the booking calendar all write into one record on their own. A missed call creates a lead. The first reply goes out within a minute. Follow-ups happen on a schedule whether or not anyone remembers. Nobody has to type to make it true.

HOW YOU KNOW IT IS WORKING

You can answer "what happened to every enquiry last week" in 30 seconds from one screen. Time to first reply is measured in minutes, not days, and you can see it.

WHERE IT FALLS DOWN

It needs setting up properly, and someone inside the business must own it. If your process changes every week it will keep breaking. It is overkill under 5 leads a week. It costs money to run, so the number in Step 1 has to justify it, and if it does not, do not buy it from anyone, including us.

RIGHT FOR

More than 20 leads a week, or any volume where 4 or more people touch a lead, or leads arrive from 4 or more sources, or the phone is a main source and calls are not being written down.

STEP 4: THE ONE RECOMMENDATION (WRITE IT DOWN)

Based on my answers, the option that fits today is _____. The reason, in money or hours: _____

The first thing I will do this week:

Our rule of thumb. Do not buy a CRM to fix a follow-up habit you have not got yet. A sheet you fill in for one month tells you whether you have a volume problem (move to B or C) or a discipline problem (no tool fixes that). The firms that get the most from Option C are the ones that already counted their leads in Option A.

WANT ME TO MAP YOUR LEADS FOR A WEEK AND TELL YOU WHICH COLUMN YOU ARE IN?

I will set up the one-week count with you, read the result, and tell you straight whether the answer is a spreadsheet, a tool, or a system. If the answer is A or B, I will say so and you will not hear a pitch.

badboylabs.com/crm-automation

If you landed on Option A, you do not need me yet. Build the sheet today and count for a month.