CRM Quick-Start Checklist for Service-Based Businesses by iGotU Media

☐ Collect all your past and current client info (name, phone, email)

☐ Pick a CRM tool (HubSpot, Jobber, etc.)

☐ Import contacts into the system

☐ Tag contacts by lead, current job, or past customer

☐ Set up automated follow-ups (after quote, after job, 6-month check-in)

☐ Write 2 simple email templates (quote follow-up, thank you/check-in)

☐ Start collecting emails from future leads (in-person, website, etc.)

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Simple steps. Big results.