



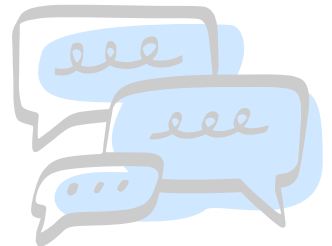
DAILY CRM CHECKLIST

Your Daily CRM Routine — 5 Minutes to Stay Organized

Start your day inside the CRM. These quick steps keep your messages, contacts, and deals up-to-date so your whole team stays in sync.

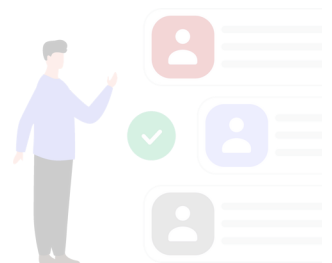
✓ **STEP 1: CHECK CONVERSATIONS**

- ☐ Read and reply to new messages.
- ☐ Archive or mark items once complete.
- ☐ Add notes if a message requires follow-up.



✓ **STEP 2: REVIEW CONTACTS**

- ☐ Add any new leads or updates from calls or emails.
- ☐ Tag new contacts (example: "New Lead," "Follow Up," "Client").
- ☐ Add notes to record recent interactions.



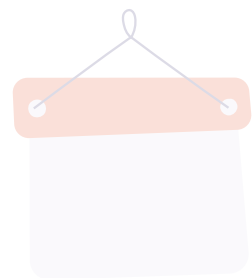
✓ **STEP 3: UPDATE OPPORTUNITIES**

- ☐ Add any new leads or updates from calls or emails.
- ☐ Tag new contacts (example: "New Lead," "Follow Up," "Client").
- ☐ Add notes to record recent interactions.



✓ **STEP 4: CHECK YOUR CALENDAR**

- ☐ Confirm upcoming calls or meetings.
- ☐ Schedule any new appointments from yesterday's interactions.
- ☐ Add reminders for follow-ups.



✓ **STEP 5: END-OF-DAY WRAP-UP**

- ☐ Review any open conversations.
- ☐ Double-check tomorrow's appointments.
- ☐ Log important notes or tasks before signing off.



Spending five focused minutes a day in your CRM keeps your communication consistent and your pipeline clear.