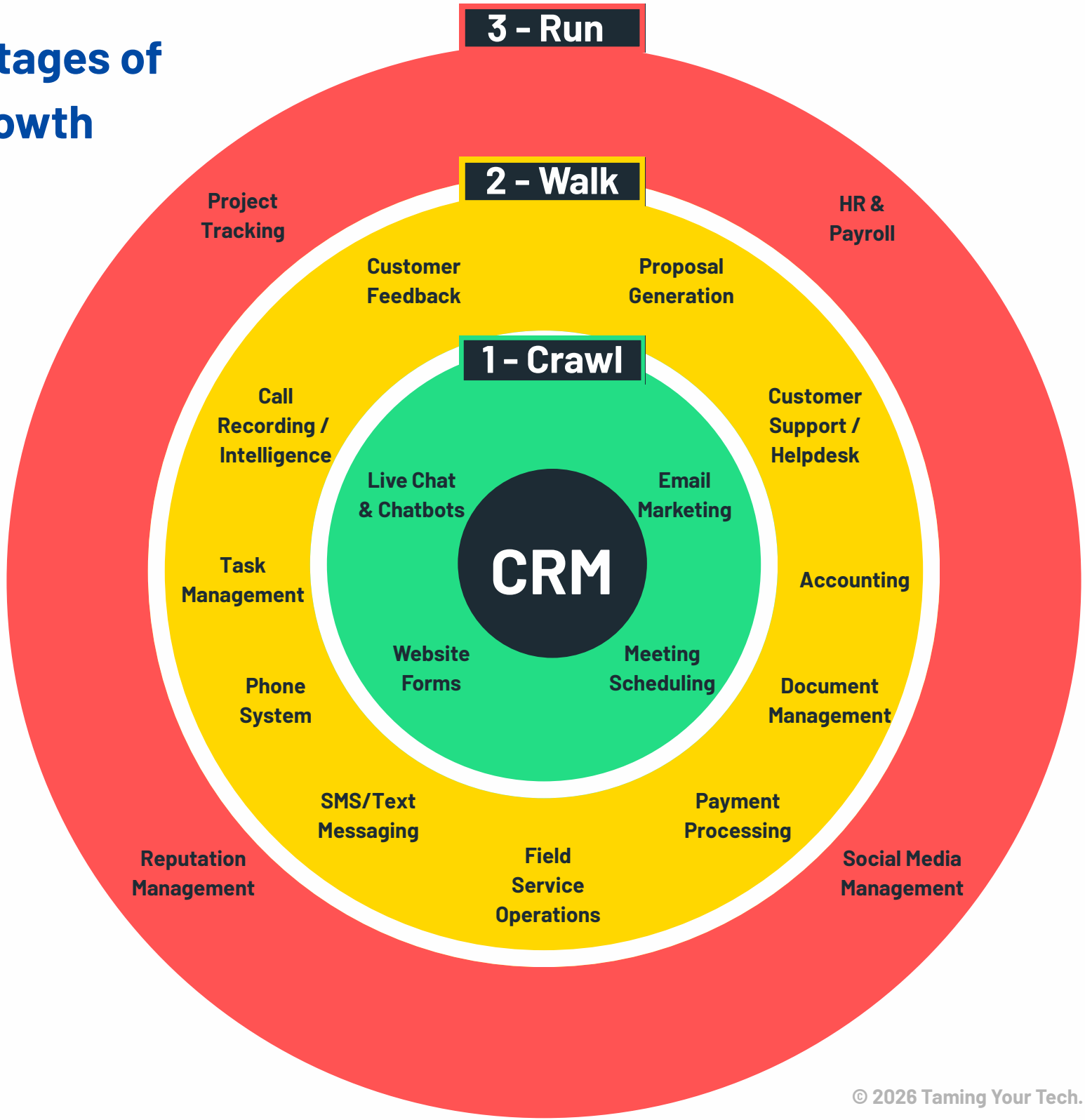
TAMING YOUR TECH

Systems That Set You Free

CRM Integrations Helpful to a SMB Owner

Stage 1 (Crawl)	This stage focuses on lead capture, email marketing, and website integration.
Stage 2 (Walk)	This stage focuses on tools that will execute and deliver work or revenue (e.g., accounting, payment systems, call recording, proposal generation).
Stage 3 (Run)	This stage, done once the CRM is fully operational, focuses on advanced tools to optimize, measure or orchestrate across teams and channels (e.g., reputation management, task/project management).

The 3 Stages of CRM Growth



Tool Category	Example Tools	Stage in which to integrate with a CRM	Why that Stage	Data Sent TO a CRM	Data Sent FROM a CRM	Benefits to a SMB Owner
Accounting Software	QuickBooks, Xero, FreshBooks	Stage 2 (Walk)	Accounting data is crucial for tracking revenue, expenses, and financial health. Once you've set up your CRM with basic lead management and sales pipeline processes, it's time to connect your accounting software to track customer payment histories, invoicing, and integrate financial reporting. However, you likely don't need this right at the beginning because CRM is focused on relationship building first.	Customer transactions, payment status, invoicing details, customer purchase history, transaction amounts, payment dates, tax info	Customer contact info, quotes, sales orders, new customer records, deal values, payment status, due amounts, invoices, financial reporting	Eliminates double data entry, reduces accounting errors, speeds up invoicing (saves ~5 days/month), real-time financial visibility, automatic customer profile creation
Call Recording/Intelligence	Granola, Zoom, Fathom, Google Meet, Gong, Chorus	Stage 2 (Walk)	Once you're engaging in more regular sales or support calls, having call intelligence integrated with your CRM helps track and analyze interactions. By the Walk phase, you'll be handling enough calls to benefit from tracking details like call outcomes, follow-up actions, and key insights from conversations. This integration improves how you manage customer interactions and can provide real-time feedback for better sales or support strategies.	Call transcripts, meeting notes, action items, sentiment analysis, talk-time ratios, keywords mentioned	Meeting attendee info, customer history, deal stage, previous interactions, upcoming tasks	Automatic meeting documentation, identifies sales coaching opportunities, captures commitments without manual note-taking, improves follow-up consistency, surfaces buyer intent signals
Customer Feedback	SurveyMonkey, Typeform, Google Forms, Jotform	Stage 2 (Walk)	Customer feedback tools are valuable once you have an established relationship with customers and can act on the insights. You're beyond the basics of lead generation and starting to nurture and serve existing clients. These tools help you measure customer satisfaction and refine products/services. But they don't need to wait until you're fully scaled up.	Survey responses, satisfaction scores (NPS/CSAT), completion rates, feedback themes, response timestamps	Customer contact info for survey distribution, trigger surveys based on lifecycle stage, segment-specific questions	Automates post-purchase/service feedback collection, identifies detractors before they churn, measures customer satisfaction trends, closes the loop on feedback, improves products based on data
Customer Support/Helpdesk	Zendesk, Freshdesk, Intercom, Help Scout	Stage 2 (Walk)	You need a way to manage and streamline customer service processes once you're engaging with a growing customer base. By Walk, you've likely moved beyond a single-person operation and need a support system to manage customer inquiries efficiently. Connecting this to your CRM ensures that support data is always linked to customer records.	Support tickets, resolution times, customer issues, product feedback, satisfaction ratings, repeat issues	Customer info for ticket context, purchase history, account details, priority status, SLA requirements	Support sees full customer context (purchases, value, history), identifies upsell opportunities during support, tracks customer health scores, prevents churn by flagging at-risk accounts, measures support impact on retention
Document Management	Google Drive, Dropbox, Box, OneDrive	Stage 2 (Walk)	By the time you've got several customers or ongoing projects, it's important to manage your documentation efficiently. Having a document management system tied to your CRM in the Walk stage ensures that all customer-related documents (contracts, proposals, etc.) are centralized in one place and can be accessed quickly during customer interactions.	Document versions, shared files, access logs, collaboration activity, document signatures	Customer-specific folders, contract templates, proposal documents, signed agreements, customer communications	All customer documents in one place, version control prevents errors, team collaboration on customer files, secure client portal access, tracks document engagement
Email Marketing	Brevo, Constant Contact, Zoho, Klaviyo, Mailchimp, MailerLite	Stage 1 (Crawl)	Email marketing is one of the earliest tools to integrate with a CRM because it allows you to nurture leads right from the beginning. Early CRM adoption will benefit from email lists and workflows that can help build engagement, even when your sales processes are still in development.	Campaign engagement, lead scoring, behavior tracking, content downloads, webinar attendance, nurture stage	Lead and contact data, segmentation rules, personalization tokens, deal stage for targeting, sales-ready leads	Nurtures leads automatically until sales-ready, scores leads based on engagement, aligns marketing and sales, tracks marketing ROI to revenue, reduces lead response time
Field Service Operations	ServiceTitan, Jobber	Stage 2 (Walk)	After you've got your CRM processes working with sales and marketing, integrating a field service tool makes sense as your business scales and you manage service teams. This stage often comes once you have an established customer base and need to coordinate service delivery more efficiently.	Work order completion, service history, technician notes, equipment/asset data, customer service preferences	Customer contact info, service appointments, quotes, contract details, warranty status, service completion, customer feedback, follow-up appointment scheduling	Technicians access full customer history in field, automatic work order creation from sales, upsell opportunities tracked, service history improves customer satisfaction, unified view of sales and service

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HR/Payroll Software	Gusto, ADP, Paycor, BambooHR	Stage 3 (Run)	HR and payroll systems come into play after your business has scaled enough to require formal employee management. By the time you reach the Run stage, you're likely managing multiple employees, have established financial systems, and need a comprehensive HR tool integrated with your CRM. This allows you to align employee performance with customer satisfaction or service delivery.	Employee records, payroll data, time-off requests, benefits details	Payslips, tax filing information, benefits updates	This integration centralizes your employee and customer data, helping with internal processes like tracking service quality, managing workload, and linking employee performance with customer feedback or satisfaction. It can also make managing payroll, benefits, and compliance more efficient, reducing administrative overhead.
Live Chat and Chatbots	Intercom, Drift, Tidio, LiveChat, Zendesk Chat)	Stage 1 (Crawl)	Live chat is fundamentally a lead capture mechanism, just like website forms. Unlike phone systems (Stage 2) which require human staff, chatbots work around the clock capturing leads even when your team is offline. This is a foundational lead generation tool, not an operational enhancement. Note: This could be integrated in Stage 2 if is viewd primarily as a support tool rather than lead capture.	Chat transcripts, response times, resolved issues, bot interactions, visitor behavior, lead qualification answers	Customer history during chats, canned responses, escalation triggers, chatbot scripts, sentiment analysis	24/7 lead capture even when team offline, qualifies leads before human handoff, provides instant answers from CRM data, tracks chat-to-sale conversion, reduces support workload
Meeting Scheduling	Calendly, Acuity, Fireflies, YCBM	Stage 1 (Crawl)	These tools can quickly integrate with your CRM and are an easy win. Automating meeting scheduling saves time for both your team and customers, and keeps CRM contacts aligned with meeting data right from the start.	Meeting requests, booked appointments, meeting type, attendee info, preferred time slots, cancellations, reschedules, time zone data	Booking confirmations, meeting context, preparation materials, customer details, available time slots, follow-up emails, feedback from meetings	Eliminates scheduling back-and-forth, auto-creates leads from bookings, sends prep materials automatically, reduces no-shows with reminders, tracks meeting conversion rates
Payment Processing	Stripe, Square, PayPal	Stage 2 (Walk)	Payments are vital to any business, but integrating payment systems should come after you've solidified customer records and sales pipeline tracking. Integrating payment tools with your CRM streamlines invoicing, payment tracking, and customer financial data.	Transaction success/failure, payment amounts, payment method, customer payment history, refund requests	Customer billing info, invoice data, payment links, subscription details, dunning notifications	Faster payment collection, automatic receipt generation, tracks payment status in customer record, identifies payment issues early, simplifies subscription management
Phone System	RingCentral, Twilio, 8x8, Grasshopper	Stage 2 (Walk)	Phone system integrations should come once you've established basic CRM processes (e.g., leads and contacts), but before you get into advanced reporting. By integrating phone data, you can track interactions, create follow-up tasks, and log call notes.	Inbound/outbound calls, call duration, call recordings, voicemails, missed calls, caller ID	Customer name and history during calls, click-to-dial capability, call scripts, follow-up tasks	Automatic call logging (no manual entry), displays customer context during calls, tracks call metrics, improves response times, creates tasks from missed calls
Project Tracking Software	Asana, Trello, Monday, SmartSheet	Stage 3 (Run)	Once you've got a good grip on managing customers and sales, project tracking becomes important when you're handling multiple customer projects or internal tasks. At this stage, you're starting to scale and need systems to manage workflows and deadlines. Integrating project tracking with your CRM allows you to link customer projects directly with their CRM records, improving visibility and task coordination.	Project status updates, task completion, milestone progress, time tracked, deliverable status	Client contact info, project scope from deals, deadlines, team assignments, project budget	Automatic project creation from closed deals, client visibility into progress, tracks project profitability, ensures deliverables align with sold scope, identifies bottlenecks
Proposal Generation Software	PandaDoc, Qwilr, Propsify, Better Proposals	Stage 2 (Walk)	By the Walk phase, you have an established CRM, a pipeline of leads, and are likely creating and sending proposals to customers. Integrating proposal generation software earlier in your CRM journey allows you to leverage data (like views, comments, or signatures) to create timely follow-ups and close deals faster. The integration will help connect these proposals to customer records, track engagement, and ensure that nothing falls through the cracks.	Document views, time spent on pages, signature completion, sections viewed most, proposal acceptance	Customer details for auto-fill, pricing from quotes, product/service catalog, terms and conditions	Tracks who views proposals and when, sends automatic follow-ups, identifies pricing objections, speeds up approval process, converts won proposals to deals automatically

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Reputation Management	Birdeye, Sprout Social, Brandwatch, Podium	Stage 3 (Run)	By the time your CRM is fully operational and you're managing customer relationships actively, you'll have enough data and interactions to focus on managing and growing your online reputation. Integrating reputation tools will help monitor reviews, social mentions, and online sentiment.	Review submissions, star ratings, customer feedback, social mentions, sentiment scores, response times	Customer contact info for review requests, transaction/service completion triggers, customer segments	Automates review requests after purchase/service, responds to reviews from CRM, identifies at-risk customers from negative feedback, improves online ratings, tracks reputation ROI
SMS/Text Messaging	Twilio, SimpleTexting, EZ Texting, Podium Messaging	Stage 2 (Walk)	SMS is increasingly used for appointment reminders (reduces no-shows by 30-40%), payment reminders (faster collection), service confirmations (field service, deliveries), and two-way customer service conversations. These are core operational functions that directly impact service delivery and revenue collection.	Text message responses, delivery status, opt-outs, click-through rates on links, conversation threads	Customer phone numbers, text message campaigns, appointment reminders, payment reminders, two-way texting	Higher open rates than email (98% vs 20%), appointment reminder automation reduces no-shows, enables conversational selling, quick payment collection via text, mobile-first customer communication
Social Media Management	Hootsuite, Buffer, Sprout Social, Later, SocialBee	Stage 3 (Run)	By the time you're in the "Run" stage, you'll likely be managing an active social media presence and need to integrate those insights into your CRM for better customer engagement and campaign tracking.	Social interactions, mentions, direct messages, engagement rates, follower growth, campaign performance	Customer profiles for social outreach, contact segments for targeting, response templates, post scheduling	Manages customer conversations across all social platforms in one place, identifies sales opportunities from social interactions, tracks social media ROI, maintains consistent brand voice
Task Management	Todoist, ClickUp, Wrike, Notion	Stage 2 (Walk)	Task management tools help streamline team communication and organize daily responsibilities. These tools integrate once you have an established CRM that's already tracking leads and sales progress.	Task details, deadlines, assigned users, priorities	Task progress, completion status, reminders	Increased productivity. Helps prioritize and organize tasks effectively, reducing the chance of missed deadlines.
Website Contact Forms	Typeform, Gravity Forms, Wix Forms, WordPress Forms	Stage 1 (Crawl)	Website forms capture key customer data from day one, and integrating them with your CRM early on will help you convert leads into contacts right from the start. Even at the earliest stage, capturing data through forms (e.g., sign-ups, inquiries) helps grow your CRM database.	Form submissions, lead source, submitted fields, form completion rate, time to submit	Form pre-fill data for known contacts, personalized form fields, follow-up sequences, lead scoring	Every website lead auto-enters CRM, no lost inquiries, immediate follow-up triggers, tracks lead source ROI, reduces response time from hours to minutes