Simple CRM Toolkit for South African SMEs

What to track • What to automate • What to ignore

Free SME Toolkit by hyperLOOP

Most SMEs Don't Need a "Powerful CRM"

You need a system that stops the chaos that's costing you money every single day. The reality is harsh: without proper systems, your business is bleeding opportunities and cash.

Leads Disappearing

Enquiries arrive via WhatsApp, email, phone calls, and walk-ins. Then they vanish into thin air because there's no single place to capture them all.

Follow-Ups Dying

You mean to call back. You really do. But days pass, weeks disappear, and that hot lead has already gone with your competitor.

Deposits Taking Forever

Quotes sent, crickets received. You're chasing payments instead of delivering service, and your cashflow suffers.

Cashflow Surprises

You never quite know what's coming in next week, next month. Living project to project is exhausting and dangerous.

What a CRM Must Do

Only 3 Jobs That Actually Matter

Forget the fancy features. Forget the bells and whistles. A simple CRM for South African SMEs must accomplish three essential jobs, and nothing more. Get these right, and everything else falls into place.

01	02	03
Capture Every Lead	**Move Leads Forward**	**Protect Cashflow**
Every single enquiry—whether it arrives via WhatsApp at 22:00, through your website form, from a referral, or as a walk-in—must be recorded. No exceptions. If it's not captured, it doesn't exist, and you've just lost money.	Each lead needs a clear next step and a date when that step will happen. This creates momentum. Without forward movement, leads stagnate and die. Your CRM must make the next action obvious and unavoidable.	Track the journey from quote to deposit to final payment. Know exactly what's owed, what's overdue, and what's coming in. This visibility is the difference between surviving and thriving.

That's it. Master these three jobs before you add anything else.

The Rule That Changes Everything

If it's not in your CRM, it doesn't exist.

If it has no next step, it will go cold.

This is the fundamental truth of CRM systems. Every verbal promise, every "I'll send that quote tomorrow", every "let me get back to you"—if it's not recorded with a next action and a date, it will be forgotten.
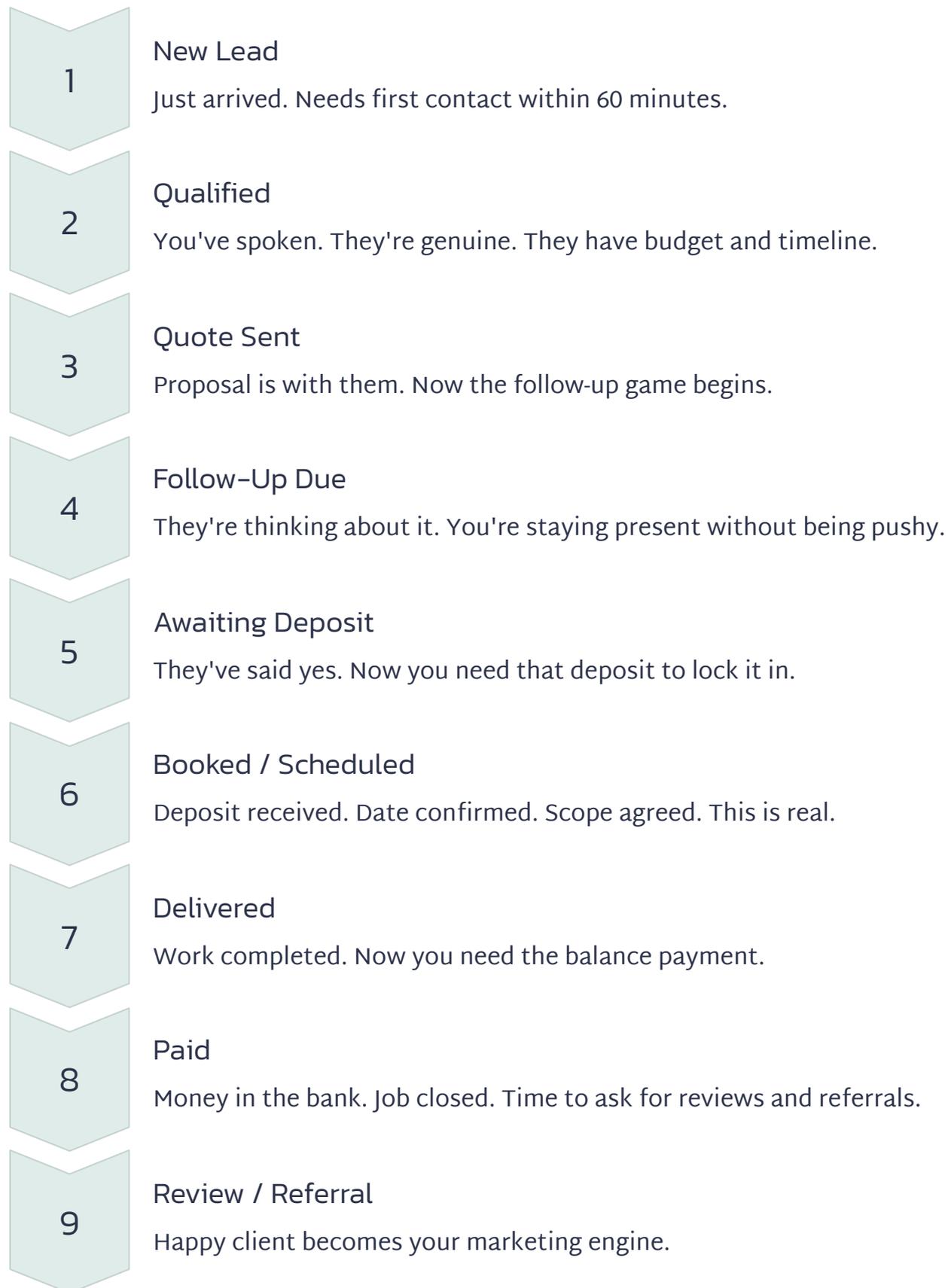
Your memory is not a business system. Your WhatsApp chat history is not a pipeline. Your Gmail inbox is not a follow-up manager.

Write it down. Assign a next step. Set a date. Or lose the sale.

The Pipeline You Should Copy

9 Stages That Cover Every SME Journey

This pipeline works for service businesses, trades, consultants, and product sellers. Use these exact stages to track every opportunity from first contact to final payment and beyond.

1 New Lead

Just arrived. Needs first contact within 60 minutes.

2 Qualified

You've spoken. They're genuine. They have budget and timeline.

3 Quote Sent

Proposal is with them. Now the follow-up game begins.

4 Follow–Up Due

They're thinking about it. You're staying present without being pushy.

5 Awaiting Deposit

They've said yes. Now you need that deposit to lock it in.

6 Booked / Scheduled

Deposit received. Date confirmed. Scope agreed. This is real.

7 Delivered

Work completed. Now you need the balance payment.

8 Paid

Money in the bank. Job closed. Time to ask for reviews and referrals.

9 Review / Referral

Happy client becomes your marketing engine.

What to Track

Keep It Tight—Track What Moves Money

Don't build a database. Build a sales engine. Every field you add creates friction and slows you down. These minimum fields give you everything you need to run your pipeline effectively without drowning in admin.

Essential Contact Information

- Name (first and surname)
- WhatsApp number (primary contact method)
- Email address
- Suburb or area (helps with scheduling and logistics)

Project Details

- Service or product requested
- Estimated value (R)
- Source (referral, website, Meta ad, Google, walk-in)

The Critical Two

- **Next action** (what you will do)
- **Next action date** (when you will do it)

Financial Tracking

- Quote amount
- Deposit amount and status
- Balance amount and status
- Payment method

> 🗒 **Pro tip:** If you're not using a field within 7 days of creating a record, delete that field. Ruthlessly eliminate unnecessary data collection.

The Most Important Fields

Your CRM Lives or Dies on These Two

Next Action

What you will do. Be specific: "Send quote", "Follow up on pricing", "Collect deposit", "Schedule installation", "Invoice balance payment". Vague actions create vague results.

Next Action Date

When you will do it. Not "sometime next week". Not "when I get a chance". A specific date: 15 March 2024. This creates accountability and urgency.

No next action = no sales.

Every opportunity without a next action is an opportunity slowly dying. The moment you close a call, send a quote, or complete a delivery, immediately record what happens next and when. Make this non-negotiable.

The Daily View You Need

Your CRM can have a hundred views, but only one matters for daily execution. This single view determines whether you're proactive or reactive, whether you're chasing opportunities or letting them chase your competitors.

Follow-Up Due Today

Every morning, before you do anything else, open this view. It shows every lead, every quote, every deposit, every payment that needs action *today*.

Clear It Before 10:00

Set the rule: this view must be empty by 10:00 every morning. Make the calls. Send the quotes. Follow up on the deposits. Chase the payments. Clear the list.

Consistency Beats Intensity

Doing this every single morning for a month will transform your sales more than any fancy feature, any expensive upgrade, any marketing campaign.

Pro tip: Block 08:30–10:00 in your calendar every day. Call it "Pipeline Clear". Protect this time like it's a client meeting—because it is. You're meeting with your future revenue.

The Weekly Rhythm

30 Minutes That Protect Your Business

Daily execution keeps the engine running. Weekly reviews keep you steering in the right direction. Every Monday morning, before the week swallows you whole, spend 30 minutes on your **CEO Reset**.

1 Cash in Bank

Know your actual position. Not what you think you have—what your bank statement says you have right now.

2 Invoices Owed to You

List every outstanding payment. Who owes you? How much? How overdue? This is your money. Go get it.

3 Pipeline for Next 14 Days

What's scheduled? What deposits are coming in? What deliveries are due? Map the next fortnight so nothing surprises you.

4 Top 10 Follow–Ups to Close

Which opportunities are closest to converting? Where should you focus your energy this week? Pick your top 10 and hunt them down.

This 30-minute ritual gives you control. You'll stop feeling like your business is happening *to* you and start feeling like you're running it.

Same-Day Quoting

Speed Wins in South African SME Markets

Leads go cold fast. Brutally fast. The difference between responding today and responding tomorrow is often the difference between winning and losing the job.

Your quote doesn't need to be perfect. It needs to be *sent*. You can refine later if needed, but getting something professional in front of the client same-day shows responsiveness, professionalism, and hunger.

The Three-Template System

Create three pre-built quote templates that cover 80% of your work:

- **Basic**—Essential service, no frills, lowest price point
- **Standard**—Most popular option, includes core extras
- **Premium**—Everything included, highest value, highest price

When a lead arrives, pick the closest template, customize the name and specifics, and send. Same day. Every time.
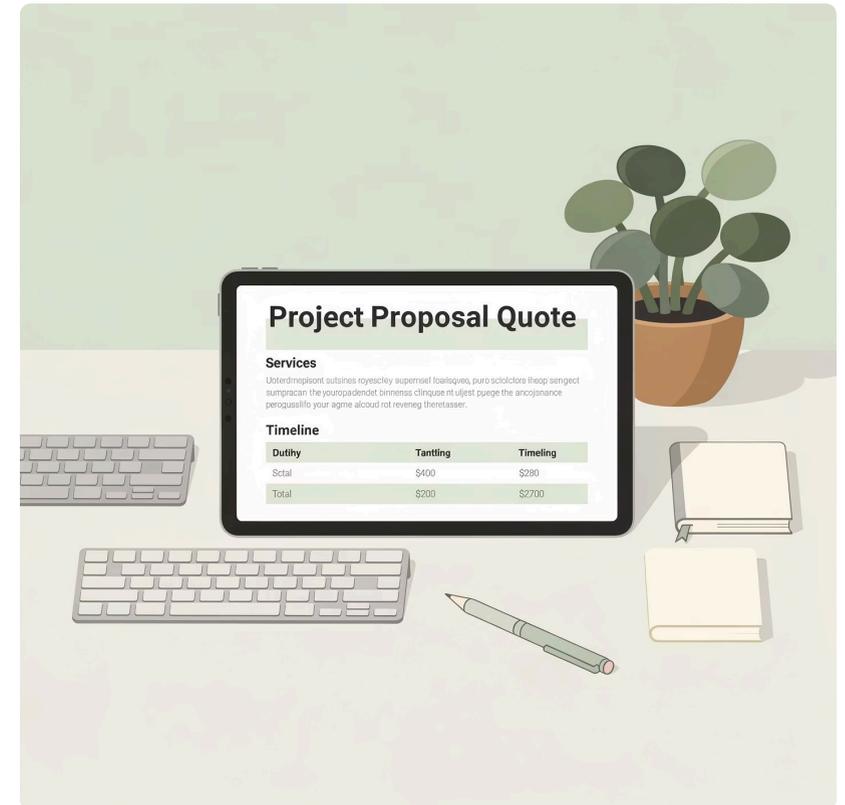
Deposits Protect SMEs

Sales isn't the quote. Sales is the deposit.

Until money changes hands, nothing is real. People cancel. People ghost. People choose your competitor. A verbal "yes" without a deposit is just optimism.

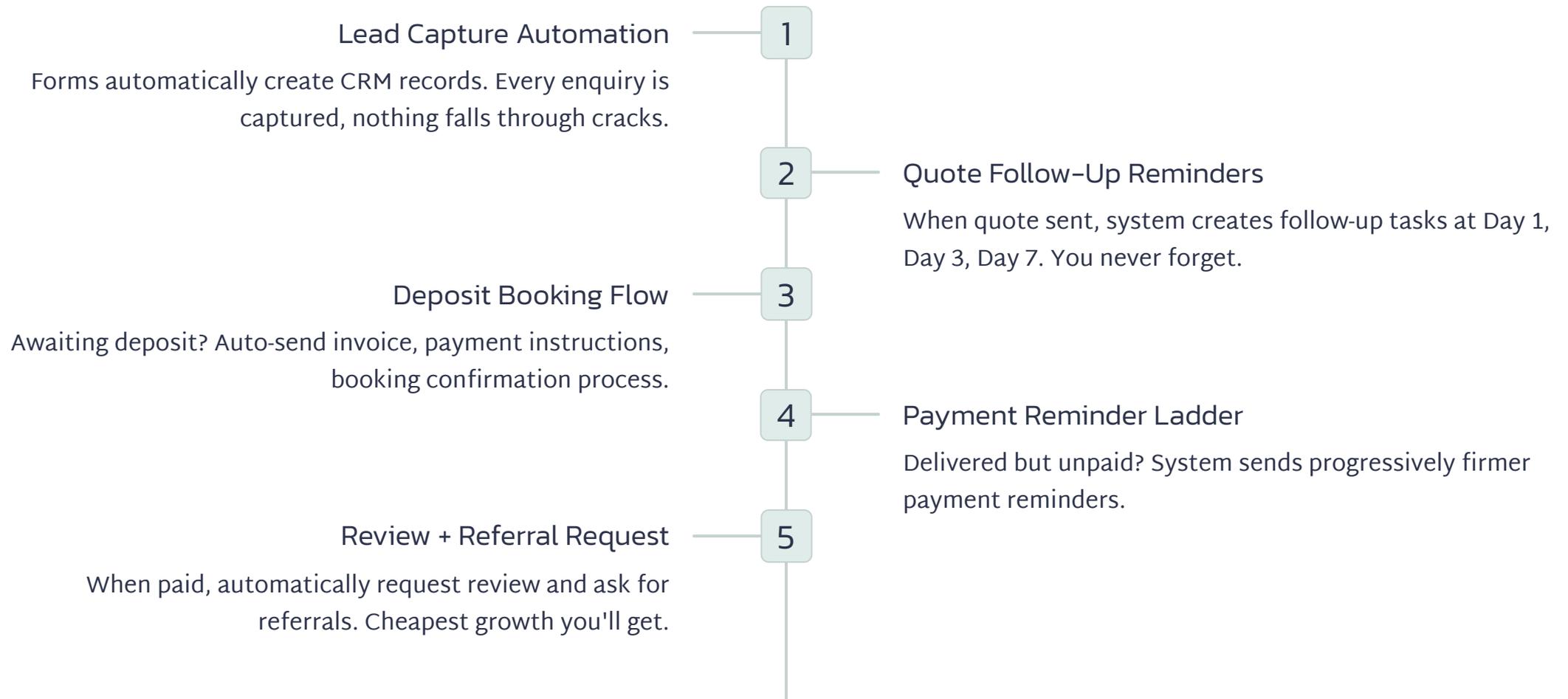| %	🔒
Set Your Deposit Rule	**Booking Confirmed When**
Decide your standard deposit percentage—typically 30-50% for services, 50-100% for products. Make it non-negotiable. Communicate it clearly: "To confirm your booking, we require a 40% deposit."	• Deposit paid (money in your bank) • Date set (specific day and time) • Scope confirmed (written agreement on what's included) All three. Not two. Not "I'll pay you on the day". All three.

South African SME reality: If someone can't afford or won't pay a deposit, they probably won't pay the balance either. Deposits filter serious clients from timewasters. Protect yourself.

What to Automate First

In Order—Start Boring, Start Profitable

Don't automate everything at once. You'll create chaos. Instead, automate one thing at a time, in this specific order. Each automation builds on the previous one.

Lead Capture Automation — **1**

Forms automatically create CRM records. Every enquiry is captured, nothing falls through cracks.

2 — ### Quote Follow–Up Reminders

When quote sent, system creates follow-up tasks at Day 1, Day 3, Day 7. You never forget.

Deposit Booking Flow — **3**

Awaiting deposit? Auto-send invoice, payment instructions, booking confirmation process.

4 — ### Payment Reminder Ladder

Delivered but unpaid? System sends progressively firmer payment reminders.

Review + Referral Request — **5**

When paid, automatically request review and ask for referrals. Cheapest growth you'll get.

Lead Capture Automation

Every enquiry must become a record automatically. No manual data entry. No copying from WhatsApp into a spreadsheet. From first contact to CRM record in seconds.

The Flow

Enquiry Arrives

Website form, Meta lead ad, Google form, walk-in QR code scan

Automatically Creates CRM Record

All details captured, source tracked, timestamp recorded

Auto-Assign Owner

Right person gets it immediately

Create Task

"Contact within 60 minutes"

Why This Matters

Speed to contact is everything. Research shows:

- Contact within 5 minutes = 100x more likely to qualify the lead
- Contact within 60 minutes = still highly effective
- Contact after 24 hours = you've probably lost them

Automation ensures every lead gets immediate attention. Nobody waits. Nobody gets forgotten. Nobody chooses your competitor because you were slow.
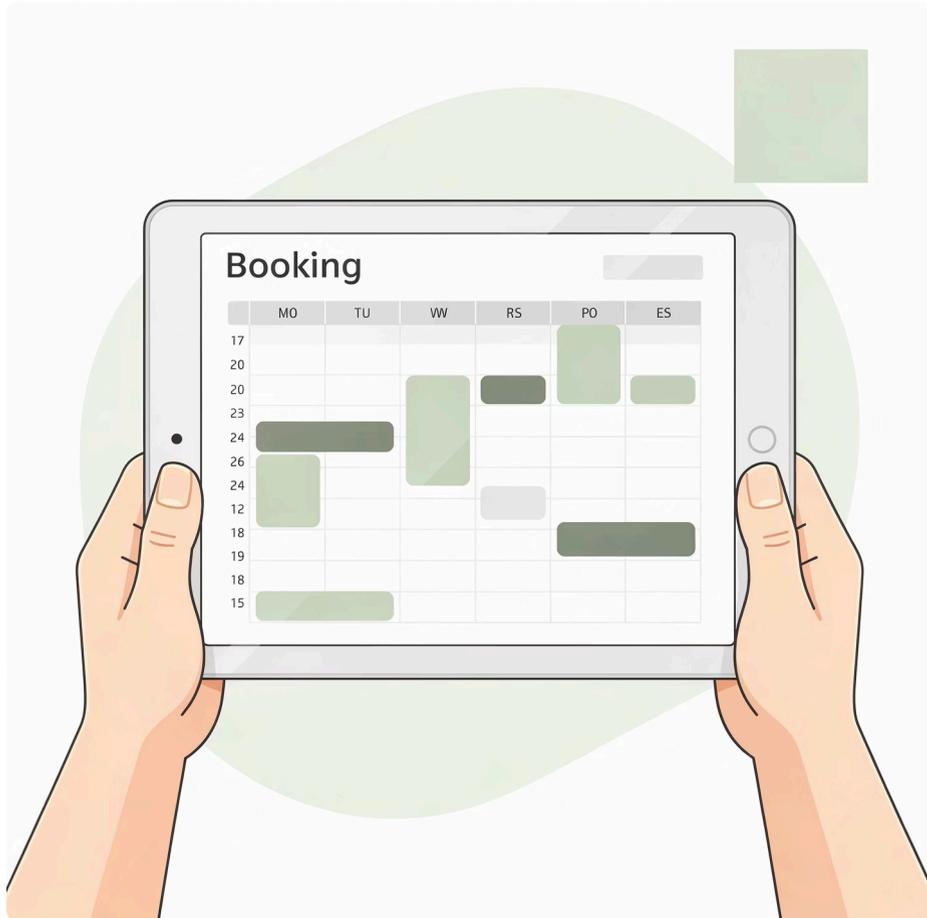
Quote Follow-Up Automation

Follow-Up Is a System, Not a Mood

You send a quote. They say "I'll think about it." Then silence. This is where most SMEs lose money—not because their quote was bad, but because their follow-up was non-existent or inconsistent.

Day 1: The Check-In

"Hi [Name], just confirming you received our quote for [service]. Any questions I can answer?"

Friendly. Helpful. Opens dialogue.

Day 7: Schedule/Availability

"Hi [Name], wanted to let you know our availability for [date range]. If you'd like to proceed, we can lock in your preferred dates now."

Creates urgency. Shows demand. Asks for decision.

Day 3: The Decision

"Hi [Name], have you had a chance to review our proposal? Happy to discuss options or adjust anything."

Direct but not pushy. Shows you're available.

Your CRM automatically creates these tasks when you mark a quote as "sent". You just execute them. No memory required. No leads forgotten. Just consistent, professional follow-up that wins more work.

Deposit to Booking Automation

The moment someone says "yes", your system should immediately guide them to payment and booking confirmation. Don't leave this to memory or manual follow-up.

When Stage = Awaiting Deposit

Your CRM automatically sends:

1. Deposit invoice with amount and payment instructions
2. "How to confirm your booking" message with clear next steps
3. Payment deadline (typically 48-72 hours)
4. Your banking details or payment link

When Deposit Received

System automatically:

- Moves record to **Booked / Scheduled**
- Sends booking confirmation with all details
- Provides pre-delivery information or preparation steps
- Creates task for actual delivery/service date

Pro tip: Accept EFT, SnapScan, Zapper, and card payments. The easier you make it to pay, the faster deposits arrive.

Collections Ladder Automation

Don't Wing Collections—Use a Calm Ladder

Chasing payments is uncomfortable. Most SME owners delay it, hoping the client will just pay. They rarely do. You need a system that removes emotion and maintains professionalism whilst protecting your cashflow.

Day 1: Friendly

"Hi [Name], work completed! Invoice attached. Payment due within 7 days. Thanks for your business."

Warm, professional, clear deadline.

Day 3: Direct

"Hi [Name], just following up on invoice #[number] sent on [date]. Due in 4 days. Let me know if you need anything."

Still friendly, but reminder is explicit.

Day 7: Firm + Pause

"Hi [Name], invoice #[number] is now due. Please arrange payment today. Any ongoing work will be paused until account is settled."

No more softness. Clear consequence.

Day 14: Final

"Hi [Name], invoice #[number] is now 7 days overdue. Per our terms, late fees apply. Payment required within 24 hours to avoid further action."

This is business. Protect yourself.

Your CRM creates these reminders automatically based on invoice date and payment status. You just send them. Consistent. Calm. Professional.

Reviews and Referrals Automation

The Cheapest Growth You'll Ever Get

When a client pays their final invoice, your relationship isn't over—it's just beginning its most valuable phase. Happy clients become your marketing engine. But only if you ask.

When Stage = Paid

Your CRM automatically triggers two messages:

- Day 0: Review Request

  "Hi [Name], so glad we could help with [service]. Would you mind leaving us a quick review? [Link to Google/Facebook/HelloPeter]"

  Include direct links. Make it effortless. Most people will do it if you just ask.

- Day 2: Referral Ask

  "Hi [Name], if you know anyone who needs [service], we'd appreciate the referral. As a thank you, we offer [referral incentive] for any bookings that come through."

  Timing matters. Too soon feels pushy. Two days after payment is perfect.

Why This Works

South African consumers trust reviews and referrals more than any advert you could run. A five-star Google review is worth more than R5,000 in Facebook ads.

But people forget. They mean to leave a review, then life happens. They'd happily refer you, but they don't think of it.

Your automated system ensures every happy client gets asked. Some say yes. That's enough.

What to Ignore (For Now)

Get the Rhythm Right First

Every CRM platform will try to sell you on advanced features. Resist. Complexity kills adoption. If your team won't use it, it doesn't matter how powerful it is.

40 Custom Fields

You don't need to track everything. Track what moves money. More fields = more friction = less usage.

Fancy Dashboards

Pretty graphs don't close sales. The "Follow-Up Due Today" view closes sales. Focus there first.

Complicated Lead Scoring

You're an SME, not a multinational. You know your hot leads from your cold ones. You don't need algorithms.

"AI Everything"

AI is powerful. But if you can't execute the basics consistently, AI won't save you. Master manual first.

Add complexity only when simplicity stops working. For most South African SMEs, the simple system described in this presentation will handle 5-50+ employees comfortably. Get it working first. Upgrade later if needed.

Your 60-Minute Setup Checklist

Everything You Need to Launch Today

You've read the theory. Now execute. Block 60 minutes in your calendar today—not tomorrow, not next week, *today*—and set up your simple CRM using this checklist.

- ✅ **Create Pipeline Stages**

  Set up the 9 stages exactly as shown: New Lead → Qualified → Quote Sent → Follow-Up Due → Awaiting Deposit → Booked → Delivered → Paid → Review/Referral

- ✅ **Add the Minimum Fields**

  Name, contact (WhatsApp + email), suburb, service requested, source, estimated value, next action, next action date, payment status. Nothing more.

- ✅ **Create "Follow-Up Due Today" View**

  Filter for all records where next action date = today. This becomes your daily command centre.

- ✅ **Create "Awaiting Deposit" View**

  Filter for all records in "Awaiting Deposit" stage. Check this twice daily until deposits land.

- ✅ **Add 3 Quote Templates**

  Build Basic, Standard, and Premium quote templates for your most common services. Save them for instant customization.

- ✅ **Set Your Deposit Rule**

  Decide your percentage (30-50% typical). Write it down. Make it non-negotiable. Communicate it clearly to every client.

- ✅ **Block Follow-Up Before 10:00**

  Add "Pipeline Clear: 08:30-10:00" to your calendar. Repeat daily. Protect this time like a client meeting.

That's it. You're done. Now use it every single day.

Simple systems, executed consistently, transform businesses. Start today.