



Learn To CRM

Your Business. Your Way. Your CRM.

Your Business. Your Way. Your CRM

Learn To CRM - Ultimate Way To
Automate Your Businesses



Learn To CRM

Proprietary and Confidential to Learn To CRM, LLC



John Ranaudo, Founder

John@LearnToCRM.com

- Over 25+ years of diverse experience technology including 12 years of consulting experience in leading and executing strategies to scale CRM initiatives
- Previous small business owner for 10 years



Stop!

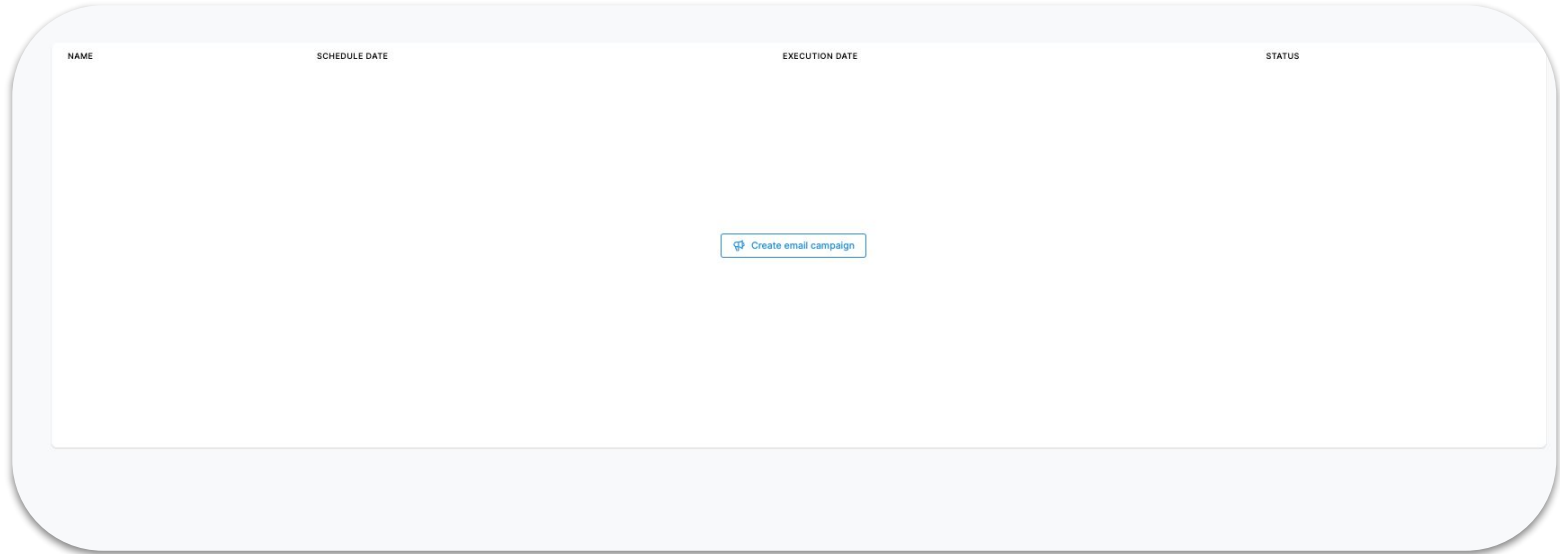
Spending HOURS To
Run Your Business By
Yourself!



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When you start with any software it is 100% Empty



Nothing Works

404

OPPS! PAGE NOT FOUND

Sorry, the page you're looking for doesn't exist. If you think something is broken, report a problem.



You have to build **everything** from the ground up

Workflows

Create folder

Create workflow

All Workflows

Draft

Published

NAME	TOTAL ENROLLED	ACTIVE ENROLLED	LAST UPDATED	CREATED	ACTIONS
<div></div> <div>No workflows found. Click here to create a new workflow.</div>					



Our CRM of Choice is



Salesforce is an all-in-one CRM platform for marketing and sales. It combines multiple tools into a single solution, streamlining business operations and automating marketing processes.



Proven & Used By Many Niches

- Medical Offices
- Restaurants
- Real Estate Agents
- Dentists
- Service Companies (plumbers, HVAC, Electricians, painters)
- Marketing Agencies
- Med Spas
- Gyms
- Coaches



Let's Learn

How We Can Easily Help Your Business Grow



WHAT'S MOST IMPORTANT FOR BUSINESSES

Make Money. Save Money. Save Time

1. List Reactivations
2. Lead Nurturing
3. Missed Call Text Backs
4. Reputation Management
5. Booking Calendars
6. Opportunity Management



#1 List Reactivations

Reconnect with old customers

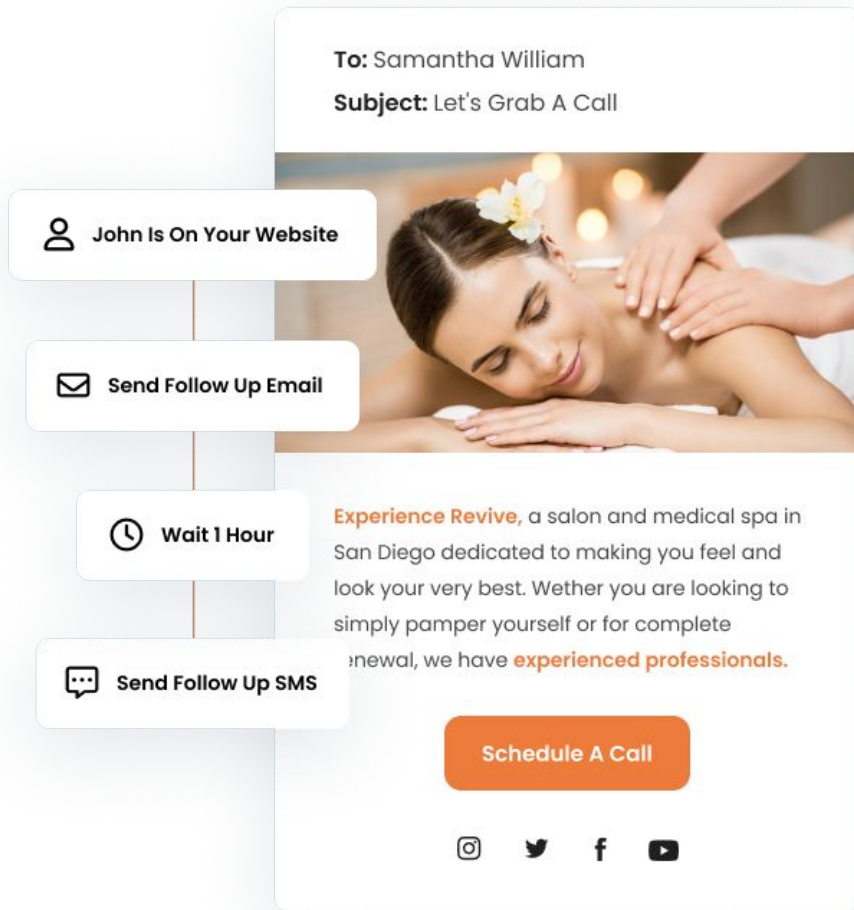


LIST REACTIVATIONS

Re-engage contacts or leads that have become inactive or dormant

Month 1-2 Process

- Strong offer, drip & lead nurture
- Respond within 5 mins
- Collab & document in CRM



LIST REACTIVATIONS

Advantages

- Reactivating dormant contacts can lead to renewed sales opportunities
- Cost effective to re-engage versus acquiring new customers
- Reactivated customers could become loyal followers
- Reactivated customers are likely to refer others with referrals



#2 Lead Nurturing

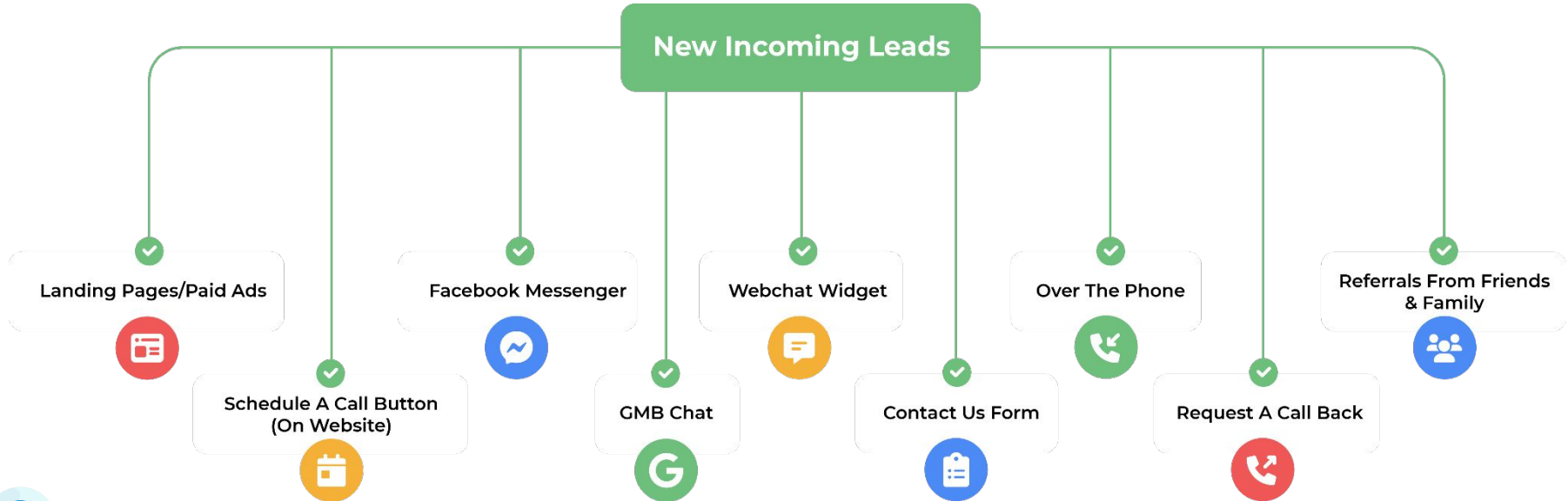
Stay in touch and follow-up with customers



LEAD NURTURING

Automated Incoming Lead Follow Up

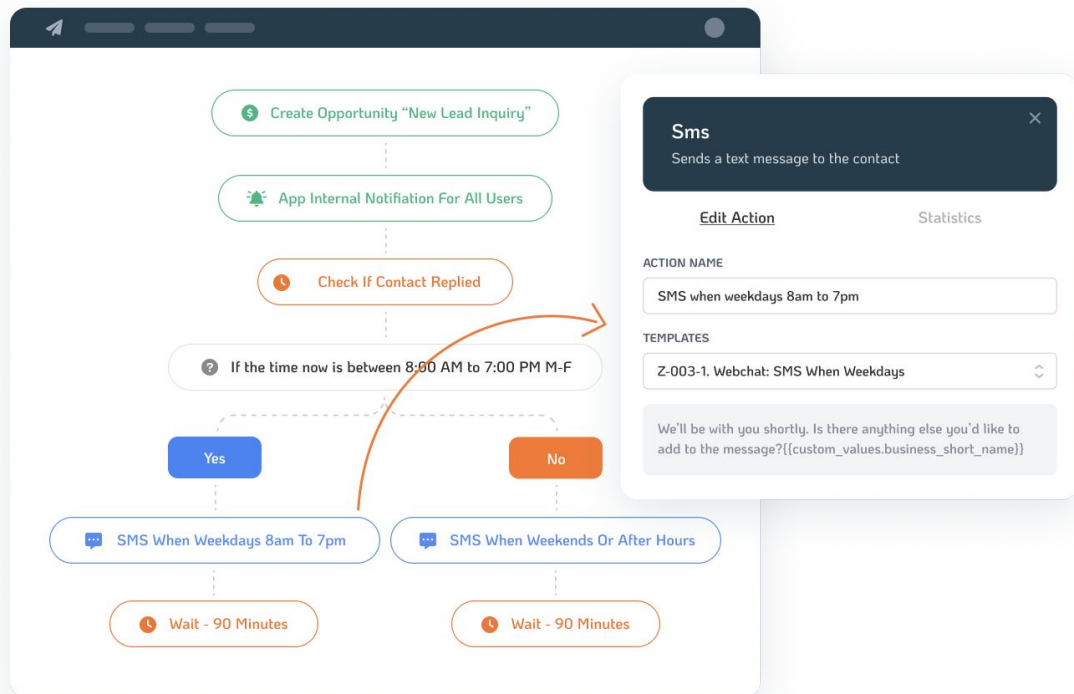
Leads come in from so many different ways we help you capture & follow up with them



LEAD NURTURING

Ready to go autoresponder messages for incoming leads

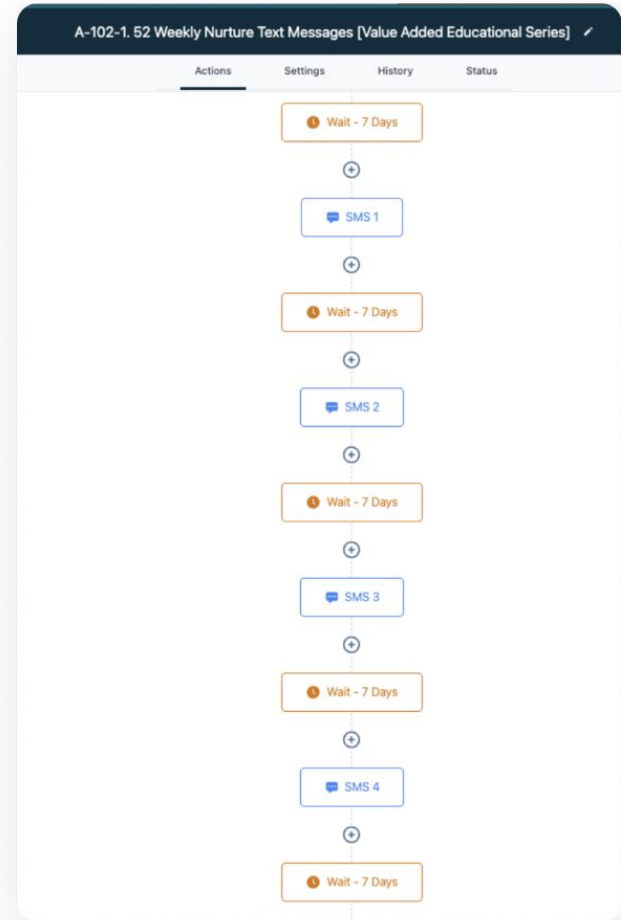
- No more missed opportunities



LEAD NURTURING

Nurture Sequences

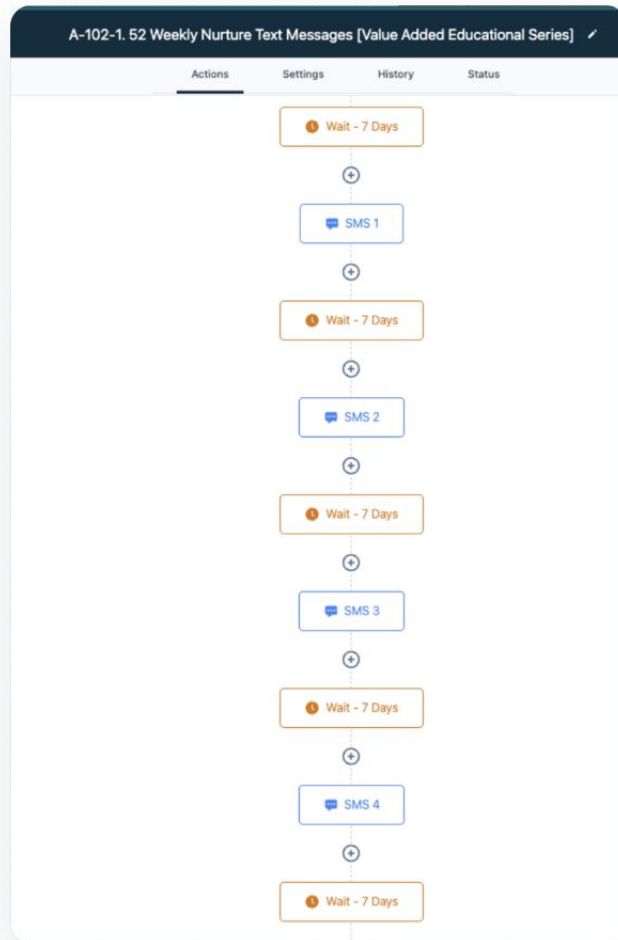
- Increase touch points and keep your business top of mind with your customers



LEAD NURTURING

52 Week Nurture Text Messages

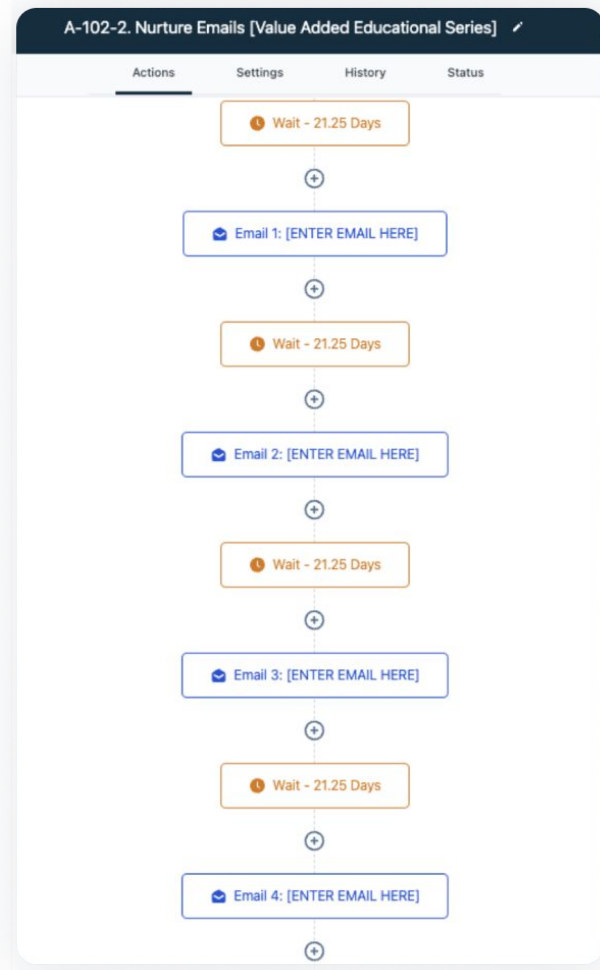
- 52 week nurture text messages send value added educational SMS tips (no hard selling) to showcase your clients as an industry expert



LEAD NURTURING

Year Long Nurture Emails

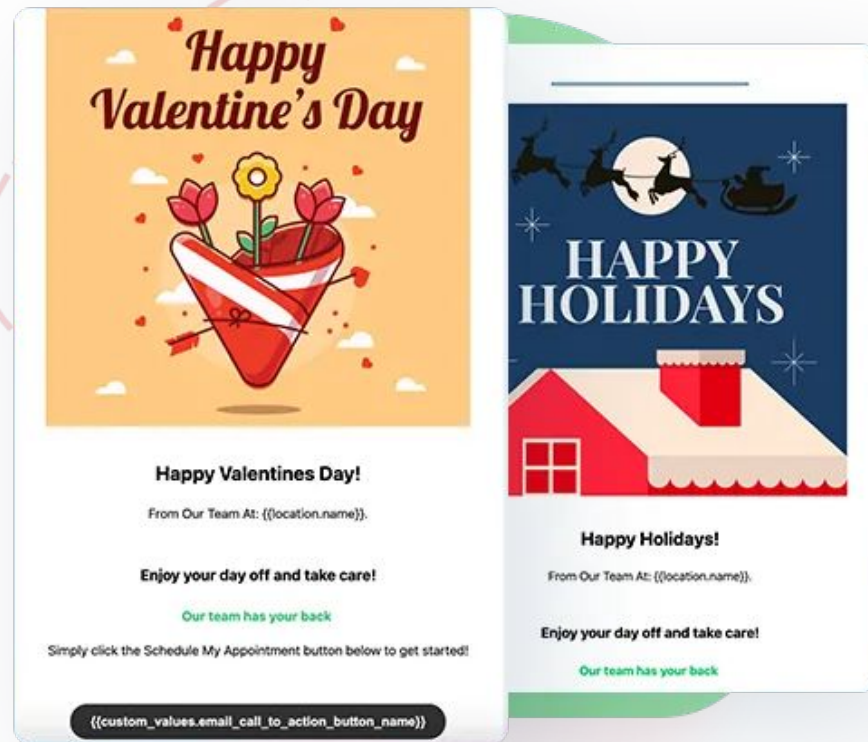
- Use these emails to keep leads engaged & increase sales



LEAD NURTURING

Beautifully Designed Holiday Emails

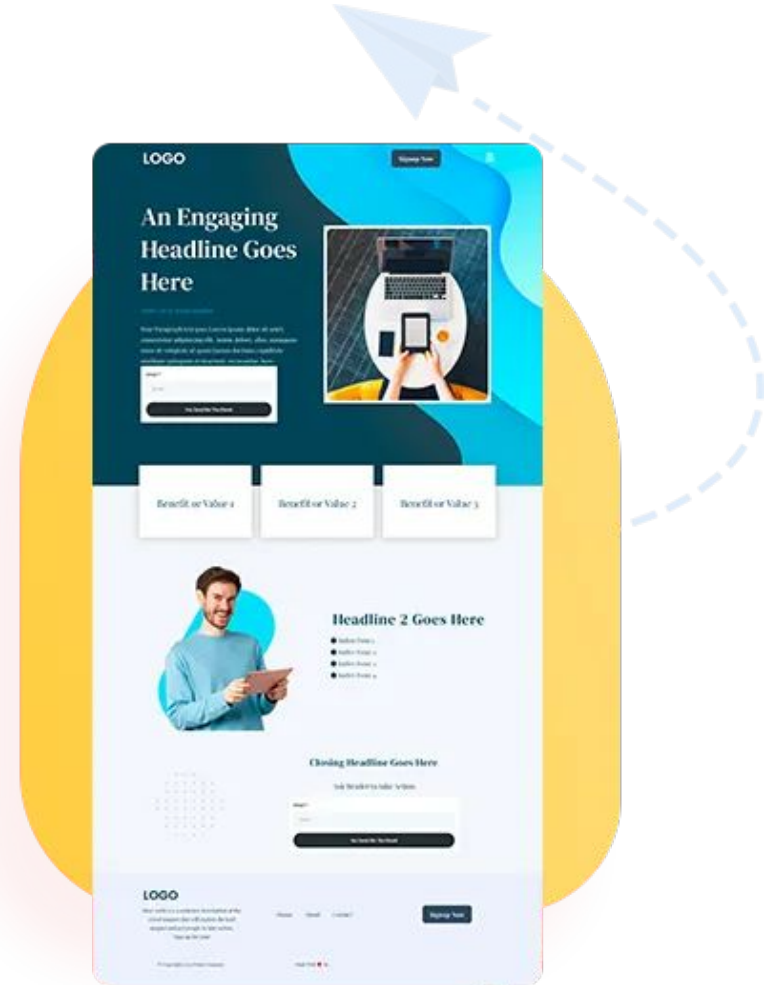
- Get more sales for your clients by creating Holiday Promo Campaigns



LEAD NURTURING

Landing pages, funnels & web to lead forms

- Comes with funnel, automation, & pipeline to help you bring in more leads



LEAD NURTURING

Advantages

- Streamlines communication for better engagement
- Personalized interactions with leads
- Tracks customer behavior for better insights
- Ensures consistent follow-ups for increased conversion rates



#3 Missed Call Text Back

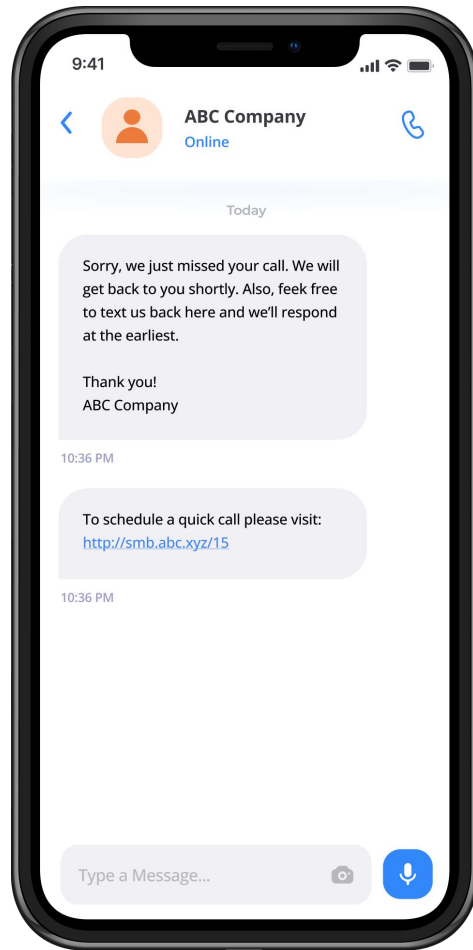
Never lose business to a missed call again!



MISSED CALL TEXT BACK

Do you currently have SMS capability?

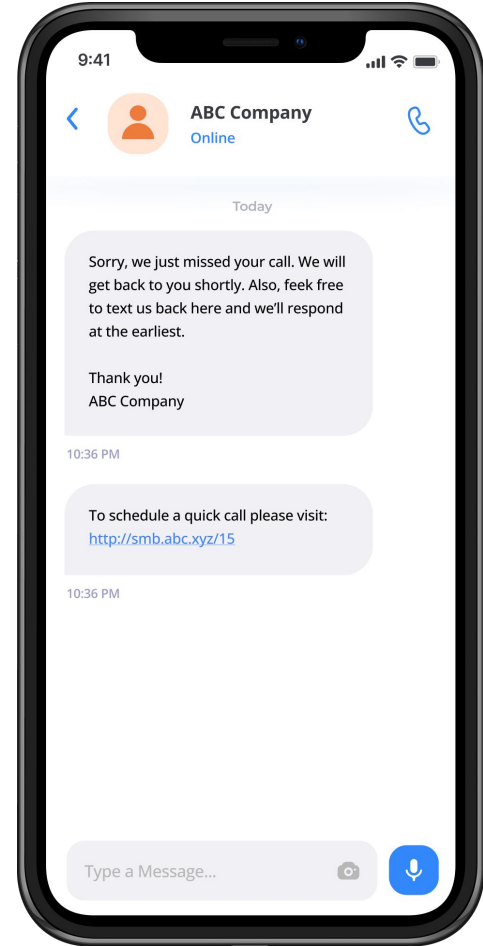
- SMS is the most preferred method of communication
- SMS avg. open rate is 98% (email is 16%)
- You read that right – 98% !!



MISSED CALL TEXT BACK

Leverage Unanswered Calls to Drive Growth

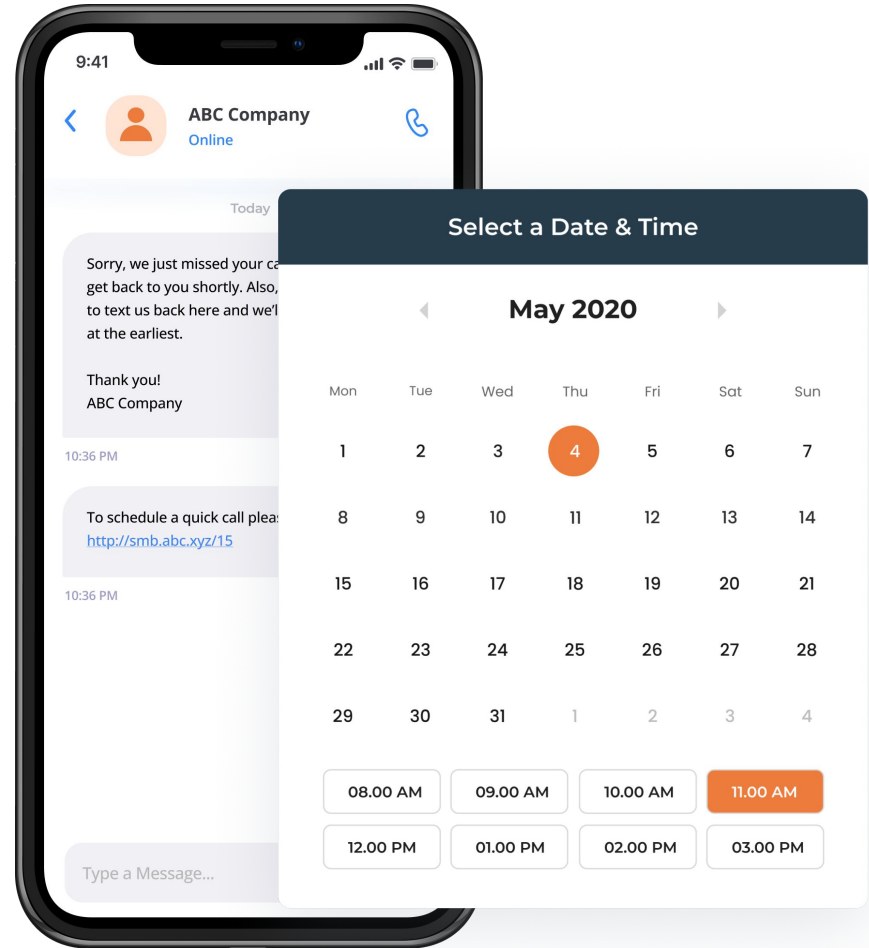
- 64% of inbound calls to local biz go unanswered everyday
- How much is a lead worth to your business?
- Every time an inbound call to your business goes unanswered, we'll send a text message back to the caller within seconds.
- When they reply, we'll push you a notification to the mobile app, where you can continue the convo!



MISSED CALL TEXT BACK

Book Appointments

- Adds a task to follow up with missed calls
- Prompts leads to book an appointment with you or text you back



MISSED CALL TEXT BACK

Advantages

- More attention is paid to them
- Conversational messaging
- Improved conversion rates (5 minute clock)
- More intimate feeling
- Greater convenience



#4 Reputation Management

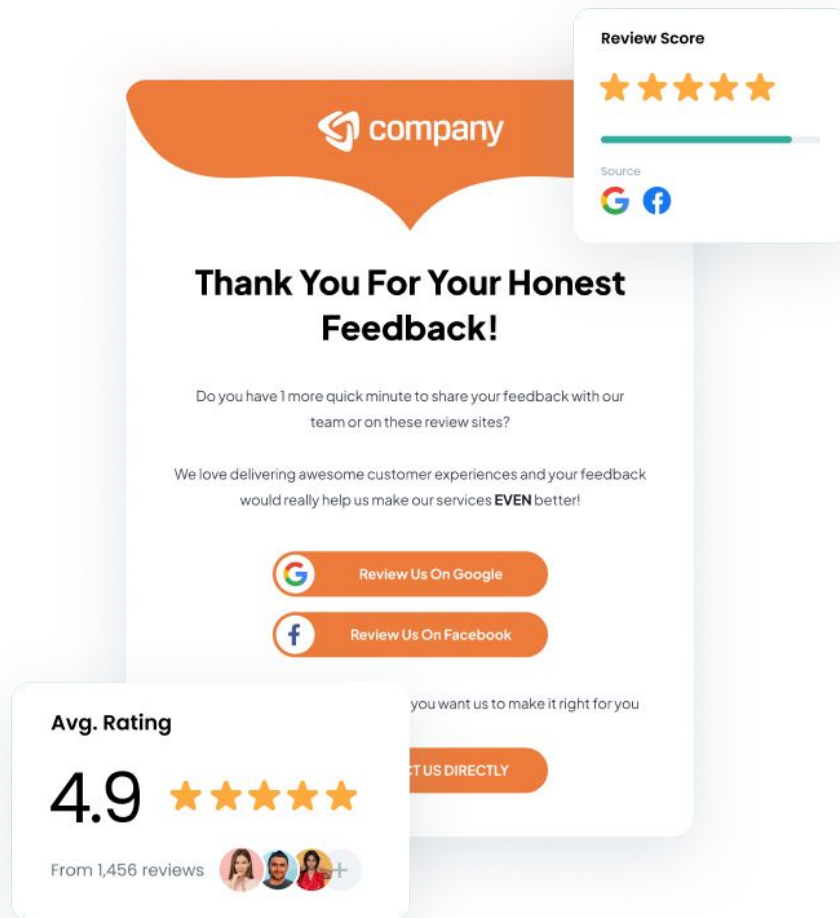
Grow your online reputation by quickly and efficiently responding to reviews and questions.



REPUTATION MANAGEMENT

Help Your Clients Become The Obvious Choice

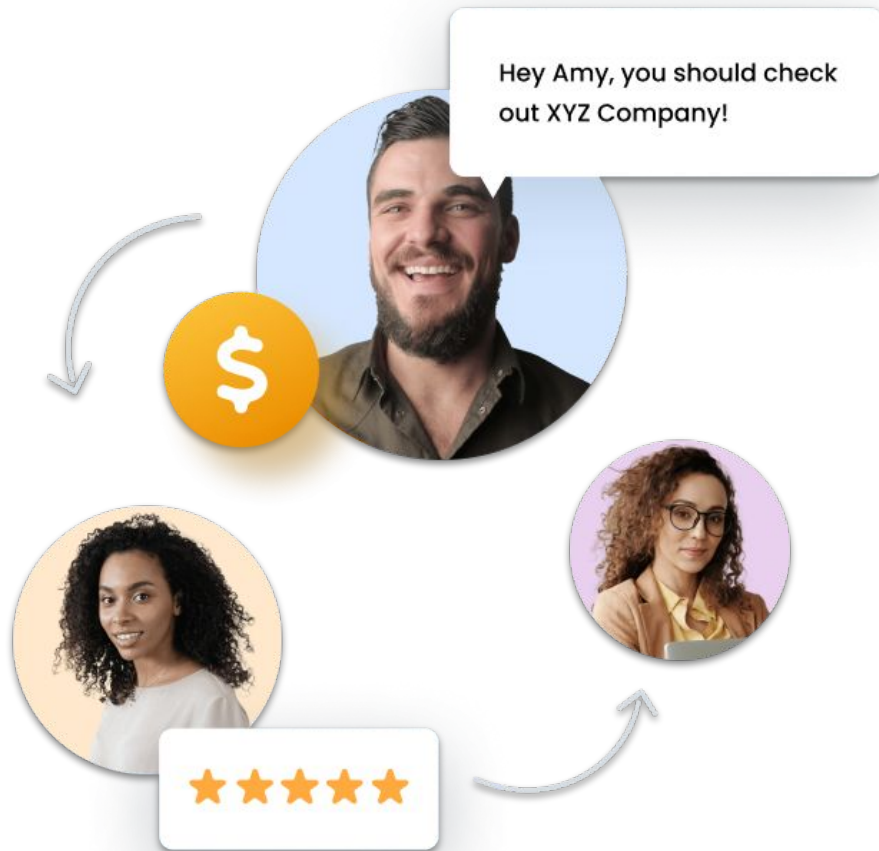
- Get more 5–Star Reviews on Autopilot
- Automated Review Request Campaign



REPUTATION MANAGEMENT

Turn your Happy Clients Into MORE Happy Clients

- Automated Refer us to Friends and Family Campaign



REPUTATION MANAGEMENT

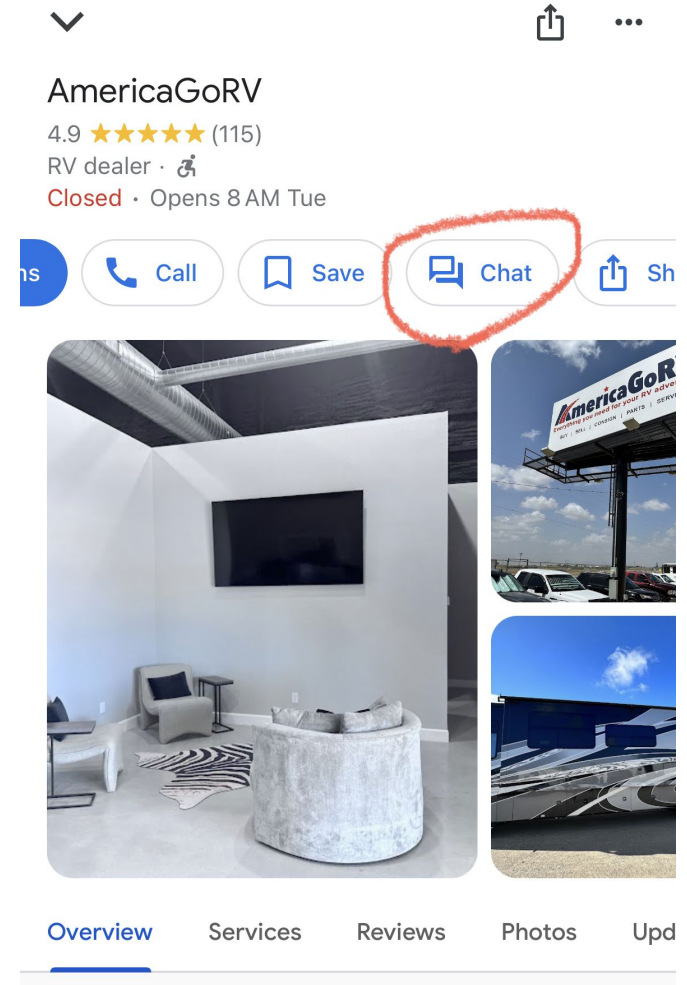
Have you Activated Google and Facebook Chat?

- The avg business receives over 1000 visits per month to their google profile
- Limit cold leads with Google Business and Facebook Chat responses



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REPUTATION MANAGEMENT

Advantages

- Attract high reviews with customers with prize contest automation
- Deflect low score reviews with surveys
- Limit cold leads with Google Business and Facebook Chat responses
- Use reputation reports to monitor feedback and follow-ups
- Post blog content to Facebook and Google to increase awareness and brand reputation



#5 Booking Calendars

Keep a fuller schedule, automatically



BOOKING CALENDARS

Turn Leads to Booked Appointment

- How fast are you responding to leads?
- You are 100x more likely to connect with a lead if you respond within 5 mins

Chat Conversation:

Laura

Hi how can I help you?
10:58 PM

Hello

I want to make a new website for my business. I already have the rough idea.
11:06 AM

Awesome, I'd love to learn more, let's go ahead and hop on a call here's my calendar: website.com/schedule
10:58 PM

Type a message...

Calendar: October 2021

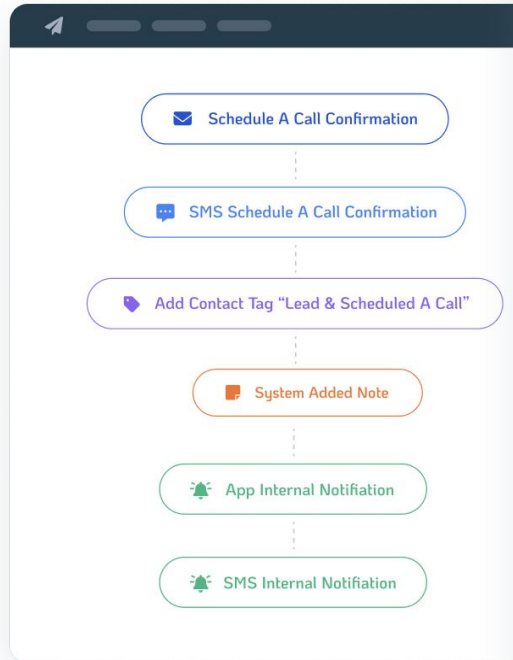
Wed	Thu	Fri	Sat	Sun
3	4	5	6	7
10	11	12	13	14
17	18	19	20	21
24	25	26	27	28
31	1	2	3	4

Appointment Booked



BOOKING CALENDARS

Reduce No Shows With meeting confirmations & reminders leading up to the call



Email

Sends an email to the contact

Edit Action

Statistics

ACTION NAME

Schedule A Call Confirmation

FROM NAME

{{user.first_name}} {{custom_values.business_short_name}}

FROM EMAIL

{{custom_values.from_email}}

SUBJECT ⓘ

{{contact.first_name}}, Your Call Schedule Confirmation - {{c

TEMPLATE

Z-003-1. EMAIL 1: Schedule Confirmation

Hi {{contact.first_name}},

We have received your request to schedule a call. This is to confirm your call has been scheduled at your requested date/time.

{{appointment.start_time}}

Add to your Google Calendar

Add to your Outlook Calendar

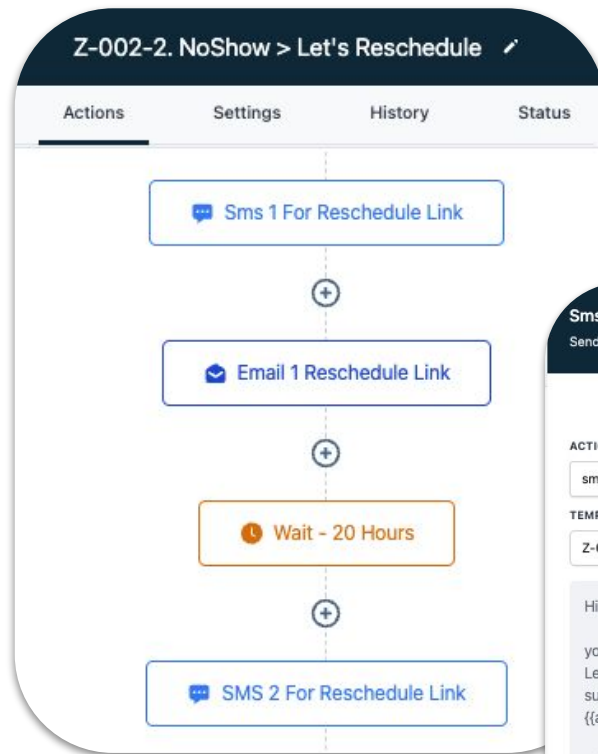
We are looking forward to talking to you,

{{appointment.user.email_signature}}



BOOKING CALENDARS

Recapture No Shows & Cancelled Appointments



Sms

Sends a text message to the contact

Edit Action Statistics

ACTION NAME

sms 1 for Reschedule Link

TEMPLATES

Z-002-2. SMS 1: Reschedule Link

Hi {{contact.first_name}},

you missed our appointment, but no worries it happens. Lets go ahead and reschedule for another time that best suits you. Please click here to reschedule {{appointment.reschedule_link}}

Thanks

{{appointment.user.first_name}}

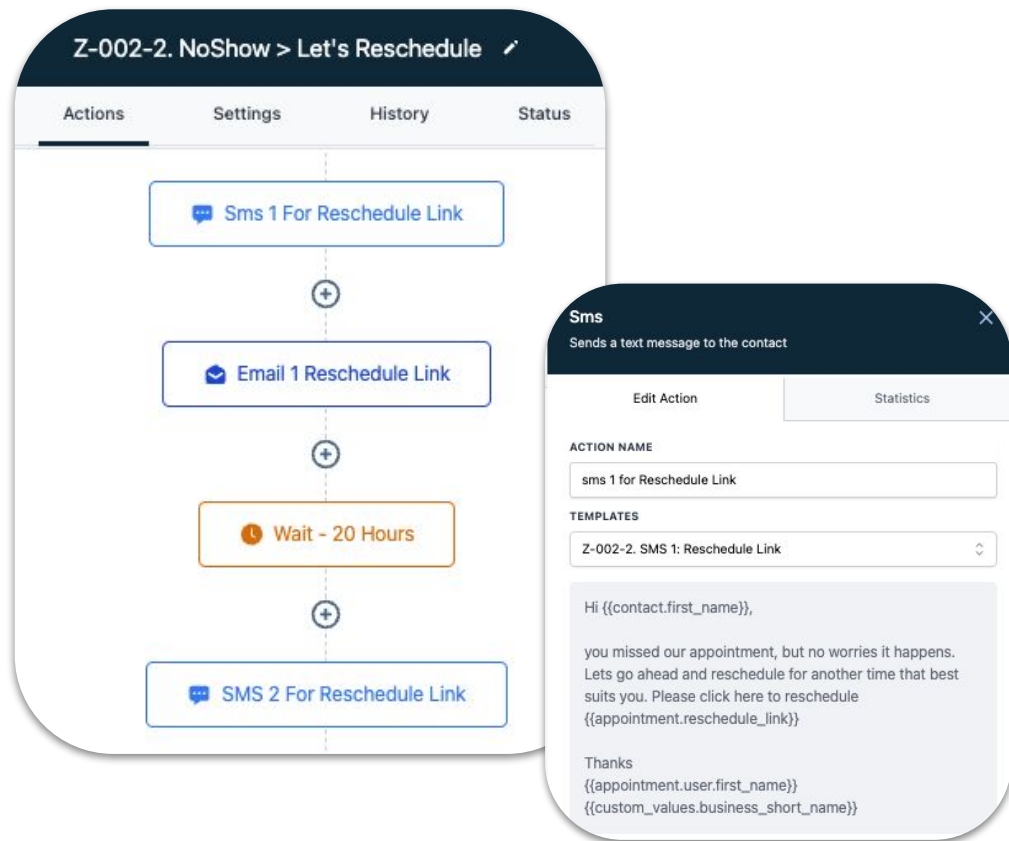
{{custom_values.business_short_name}}



BOOKING CALENDARS

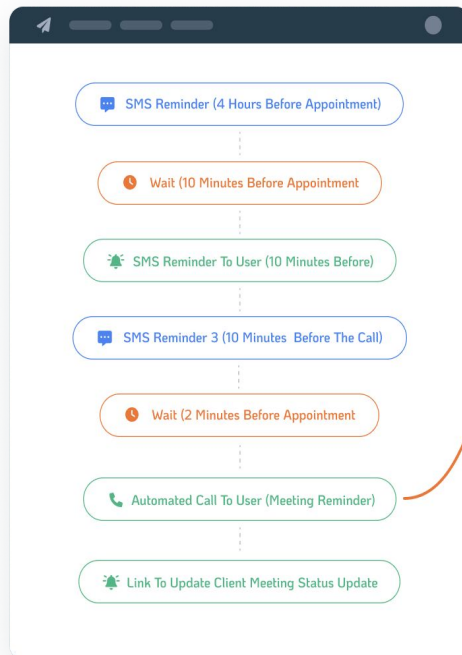
Automatically Follow Up With Your Appointments

- Email & text before each meeting
- Send a thank you email with your notes so you can be proactive about your follow up



BOOKING CALENDARS

Sends internal notifications and reminders so you can keep up to date on all the important activity



ACTION NAME

Schedule A Call Confirmation

CALL WHISPER ⓘ

Reminder: You have a call scheduled with {{contact.name}}. Please press 1 so we can connect you with your meeting right now, or if this is an online meeting. Please log in to the meeting link

CALL TIMEOUT (S)

21

DISABLE VOICEMAIL DETECT ⓘ

☐



BOOKING CALENDARS

Advantages

- Schedule more appointments, reduce no shows and impress your customers every step of the way – all without tying up your staff's time.
- Build loyalty and keep customers coming back with automated scheduling, reminders and payments.
- Collect payments even faster with tap to pay.
- Communicate the way your customers prefer – whether that's a call, text, or email.




#6 Opportunity Management

Optimize sales operations, streamline workflows, and
empower teams



OPPORTUNITY MANAGEMENT

Automated Sales Pipeline To Stay Organized, Save Tons Of Time & Assign Follow-Up Tasks

 Select date & time

Date Added (DESC) ▾

001. Main Leads Pipeline ▾

Owner ▾

Campaign ▾

All ▾

🔍 Search

+ New

1. New Lead Inquiry 0 Leads \$0.00	2. Unable To Contact Lead 0 Leads \$0.00	3. Contacted Lead 0 Leads \$0.00	4. No Show 0 Leads \$0.00	5. Showed 0 Leads \$0.00	6. Sold 2 Leads \$0.00	7. Not Interested/Not Yet Ready 0 Leads \$0.00	8. Un Qualified/Not Good Fit 0 Leads \$0.00	9. Spam 0 Leads \$0.00
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Erica Wisha Won Nov 20, 2021
positive experience review left
📞 + Task

Jennie Rus Won Nov 20, 2021
request review negative experience
📞 + Task



OPPORTUNITY MANAGEMENT

Advantages

- Track sales better and organize pipelines efficiently.
- Manage workflows, tasks, and automate operations effectively.
- Make informed decisions with detailed sales insights.
- Boost team collaboration for better communication.
- Adapt and scale features to suit your business strategies.



Thank You!

LearnToCRM.com



PROPOSALS & INVOICES

Everything you need to make the sale

- Invoice Reminders
- Know exactly when an invoice is sent & paid

INVOICE

Due: 02.08.2022
→ 12.08.2022

FROM: **Services.com**
55 W 39th St, New York, NY 10018, United States

TO: **Jonesy**
6 Kelly Rd, Cambridge, MA 02139, EUA

PayPal
Jonesy@gmail.com

QUANTITY	SERVICE	
1	DESIGN Website design	\$ 4000
1	ANIMATION Header animation	\$ 2000
1	DEVELOP Develop into live site	\$ 1000

TOTAL \$ 7000

SUBTOTAL \$ 7000
TAX \$ 000

Proposal Sent

Proposal Accepted

Send Invoice

