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CRM SETUP BRIEF: COFFEE MACHINE EMPORIUM

Purpose: Basic setup of HubSpot CRM system that centralises customer data, streamlines communication, and supports marketing, sales, and customer service activities. The goal is to improve customer retention, enhance sales processes, and create a seamless experience for all client interactions.

Phase #1 is a very basic implementation.

IMMEDIATE PRIORITIES

1. **Data Migration:**
 - Import existing customer data into HubSpot.
 - Ensure proper segmentation and tagging
2. **Audience Segmentation**
 - Complete audience segmentation as per below
3. **Training:**
 - Provide team training on how to use HubSpot's tools effectively.

REQUIREMENTS FOR PHASE #1

1. Customer Information Management:

Capture and store detailed customer profiles, including:

- Business name
- Business type (e.g., cafe, restaurant, hotel, sporting club, corporate, church, nursing home, individual buyer, other).
- Contact information (name, phone number, email, address).
- Purchase history (machine type, date, value).
- Service history (maintenance requests, warranties).
- Notes on customer preferences or special requirements.

2. Audience Segmentation:

Create audience segments based on:

- Type of client (B2B vs. B2C).

- Purchase history (e.g., frequent buyers, high-value clients).
- Product/service interests.
- Engagement level (e.g., new lead, active customer, dormant customer).

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- **Sales Pipeline Management:**

Implement a sales pipeline tailored to CoffeeMachine Emporium's sales process:

- New Leads
- Qualified Leads
- Proposal Sent
- Closed (Won/Lost)

- **Customer Support:**

The default HubSpot ticketing system to manage:

- General enquires
- Customer check-ins (prompt us when to check in e.g 1 week after purchase)
- Service reminders (prompt us to check in & remind them service is required)
- Maintenance/service requests.
- Warranty claims
- General inquiries

OTHER NOTES

- Basic dashboards (can set up ourselves)

Any questions can be directed to charmaine@littlemiss.social