monday academy

Introduction to monday CRM cheatsheet

Key concepts

Boards are **pre-built and connected**, making setup fast and scalable

It supports the **entire sales cycle:** from **lead capture to deal management**, client tracking, communication, and reporting

monday CRM is a flexible, out-of-the-box solution built on monday Work OS

Core CRM terms

- Leads (unqualified prospects)
- Deals (sales opportunities)
- Accounts (organizations)
- Contacts (individuals)
- Activities (interactions)
- Client Projects (post-sale delivery)

🛠️ What you can manage

- **Lead management**

Import leads via Excel, use forms to collect new ones, and merge duplicates easily

- **Deal management**

Track opportunities in a single board with fields like owner, value, close date, and contact. Use the **Overview** to visualize progress

- **Client management**

Manage company (Accounts) and individual (Contacts) records in separate boards. Use the **Client Projects** board to connect post-sale work

💬 Client communication

- Send emails directly from CRM with **AI assistance and templates**
- Use **Email sync & tracking** for automatic logging and reply alerts
- Log all interactions using the **Emails & Activities** view
- Reach multiple leads with personalized **Mass emails**

📊 Reporting

Use dashboards to track:

- Sales forecasts vs. actuals
- Team performance and individual goals
- Conversion rates and funnel metrics