CRM & Business Automation Toolkit

A practical, plain-English guide for Canadian food, dairy and distribution businesses that want fewer spreadsheets and more time with customers.

Run • Protect • Grow

Before you start

Most CRM projects don’t fail because of the software. They fail because nobody agreed how the work should flow, the data was messy on day one, or the team was never asked what they actually need. This toolkit helps you sort those three things out first.

It comes from the same approach we used on the DairyMax Canada project: map the real process, fix the data, automate the boring parts, and keep people in charge of the conversations that matter.

What’s inside

Tool	What it helps you decide
1. Readiness checklist	Are we actually ready for a CRM, and what needs fixing first?
2. Process mapping worksheet	Where does an enquiry slip between the cracks today?
3. Automation scorecard	Which tasks should we automate first, and which should stay human?
4. CRM blueprint	Which fields, stages and roles do we set up?
5. Ten automation ideas	Simple workflows that pay off quickly.
6. Privacy and consent check	Are we handling customer data the Canadian way?
7. 90-day rollout plan and KPIs	What happens when, and how do we know it worked?

How to use it: print it, grab the sales, dispatch and accounts leads, and work through it together over a coffee. Honest answers beat tidy ones.

1. CRM readiness checklist

Tick what is already true. Anything left blank is your starting to-do list.

[ ]	We can name one person who owns customer data and has time for the project.
[ ]	Sales, dispatch and accounts have all been asked what slows them down.
[ ]	We know where customer details live today (spreadsheets, inboxes, phones, paper).
[ ]	We have a rough count of active customers, and we know many are duplicates.
[ ]	We can describe our journey from first enquiry to paid invoice in under ten steps.
[ ]	Our product list, price lists and delivery zones are written down and current.
[ ]	We know which tools must connect to the CRM (accounting, ordering, email, phone).
[ ]	We have a budget for set-up, data clean-up and training, not just licences.
[ ]	Leadership has agreed on two or three results that would make this worthwhile.
[ ]	We know how and when each customer agreed to hear from us.
[ ]	We have a plan to retire old spreadsheets so there is only one source of truth.
[ ]	Someone has been given time to train and support the team after launch.

Reading your score. 9 to 12 ticks: you're ready to choose a platform. 5 to 8: spend a few weeks on process and data first. Under 5: that's fine. It means the groundwork will save you a lot of money later.

2. Process mapping worksheet

Walk one real order from start to finish. At each step, note who does it, which tool they use and what usually goes wrong.

Step	Who	Tool used	What goes wrong?	Time it takes
Enquiry arrives				
Quote sent				
Order confirmed				
Dispatch scheduled				
Delivered				
Invoiced and paid				
Follow-up / reorder				

3. Automation scorecard

Score each task from 1 (low) to 5 (high) on the first three columns, then total it. The best first candidates score high on volume and repetition, and low on judgement.

Task	Volume	Repetition	Needs human judgement?	Score (V+R, minus J)
Quote follow-up reminder				
Order confirmation email				
Delivery window notification				
Overdue invoice nudge				
Complaint handling				
Pricing for a new account				
Your own task: _____				

A good rule of thumb: automate the reminder, never the relationship. A late-payment nudge can be automatic. A conversation with a customer whose delivery was wrong should never be.

4. CRM blueprint

Keep it lean. Every field you add is a field someone has to fill in.

Suggested pipeline stages

Stage	Means	Exit trigger
New enquiry	Someone has asked for something	First reply sent
Quoted	Price and terms sent	Accepted or declined
Order confirmed	Customer has said yes	Dispatch booked
Delivered	Goods received	Invoice issued
Active account	Ordering regularly	No order in your agreed window

Fields worth capturing

Customer	Orders and delivery	Relationship
Business name, type, accounts contact, buyer, billing address	Delivery sites, access notes, preferred days and time windows, usual products, special handling	Source of lead, owner, consent date and type, last contact, next step, notes

Roles and access

Decide who can view, edit and export. Sales needs its accounts, dispatch needs delivery details, accounts needs billing. Nobody needs everything.

5. Ten automation ideas worth trying

Start with two or three. Prove they work, then add more.

Trigger	What happens
New enquiry	Auto-acknowledge within minutes and assign to the right rep.
Quote follow-up	Reminder to the rep after 3 days of silence, and a gentle email to the customer after 5.
Order confirmed	Send a clear summary to the customer and a task to dispatch.
Delivery day	Notify the customer of their delivery window the day before.
After delivery	Ask if everything arrived as expected. Flag any ‘no’ for a call.
Invoice due	Friendly reminder before the due date, firmer one after it.
Reorder prompt	Remind the rep when a regular customer is overdue for their usual order.
Dormant accounts	List accounts with no orders in 60 or 90 days for a personal call.
Weekly summary	Automatic email of pipeline, orders and overdue items to managers.
New starter	Checklist and access set-up when someone joins the team.

Write it like a person

Automated messages get ignored when they sound like robots. Use first names, short sentences, and say who to call. Read every template aloud before you switch it on. If you wouldn’t say it to a customer’s face, rewrite it.

6. Privacy and consent check (Canada)

- [ ] We know how and when each contact consented to receive marketing messages (CASL).
- [ ] Every marketing email identifies us and includes a working unsubscribe link.
- [ ] Unsubscribes are honoured promptly and recorded in the CRM.
- [ ] We only collect personal information we actually need and can explain why (PIPEDA).
- [ ] Access to customer data is limited by role, and former staff lose access straight away.
- [ ] Multi-factor authentication is switched on for the CRM and email.
- [ ] We know where our CRM vendor stores data and have read their security terms.
- [ ] We have a written plan for what to do if customer data is lost or exposed.

This is a practical checklist, not legal advice. For anything specific to your business, speak with a privacy or legal professional.

7. 90-day rollout plan

When	Focus	Done when
Days 1 to 15 Understand	Map the real process. Interview each team. Agree goals and who owns the project.	Process map signed off and top three goals agreed
Days 16 to 30 Prepare	Clean and de-duplicate data. Choose platform. Confirm consent records.	Clean data file ready to import
Days 31 to 55 Build	Configure pipeline and fields. Connect accounting and ordering tools. Build first two or three automations.	Test orders run end to end
Days 56 to 70 Train	Hands-on sessions by role. Short quick-start guides. Name a go-to person per team.	Everyone has logged in and handled a practice order
Days 71 to 80 Go live	Switch over. Retire old spreadsheets. Daily check-ins for the first week.	Old files are read-only
Days 81 to 90 Improve	Review what's working. Fix irritations. Choose the next automations.	First review meeting held

KPIs worth tracking

Measure	Before	After 90 days
Time to first reply on a new enquiry		
Quote-to-order conversion rate		
Orders needing correction		
Hours per week spent re-keying data		
Average days to get paid		
Time to produce the monthly report		
Team confidence in the data (1 to 5)		

Common pitfalls

- Automating a messy process just makes the mess faster. Fix the flow first.
- Importing dirty data on day one. It never gets cleaner on its own.
- Skipping training because 'it's intuitive'.
- Letting old spreadsheets live on 'just in case'.
- Treating go-live as the finish line instead of the start.

Want a second pair of eyes?
Digitales helps businesses Run (IT and systems), Protect (cybersecurity) and Grow (digital marketing). If you'd like to talk through your CRM or automation plans, we're happy to listen.

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