SJR. Digital

CRM Clarity — Fast, Independent Advice for Your Business

The CRM Rhythm

Your CRM, inbox and calendar working together — so follow-ups happen and your time is protected

Most owner-led businesses don't lack a CRM, an inbox or a calendar. They lack the time to keep them working together. **The CRM Rhythm** connects the tools you already use so that every morning starts with a prioritised list, drafted replies and briefed meetings, and every enquiry and conversation lands in your CRM without retyping.

Sound familiar?

These are the patterns I see most often in owner-led SMEs whose CRM has drifted from its original purpose.

Enquiries go cold

A website form or an introduction arrives while you're with a client. By the time you reply, they've spoken to someone else.

Business cards in a drawer

Great conversations at networking events, but the follow-ups slip because nobody typed them up.

The CRM is out of date

It was set up with good intentions. Now it's only as current as the last time someone had a spare hour.

The inbox runs the day

You start with email and finish with email. The important replies get the least thought.

Proposals wait for a quiet week

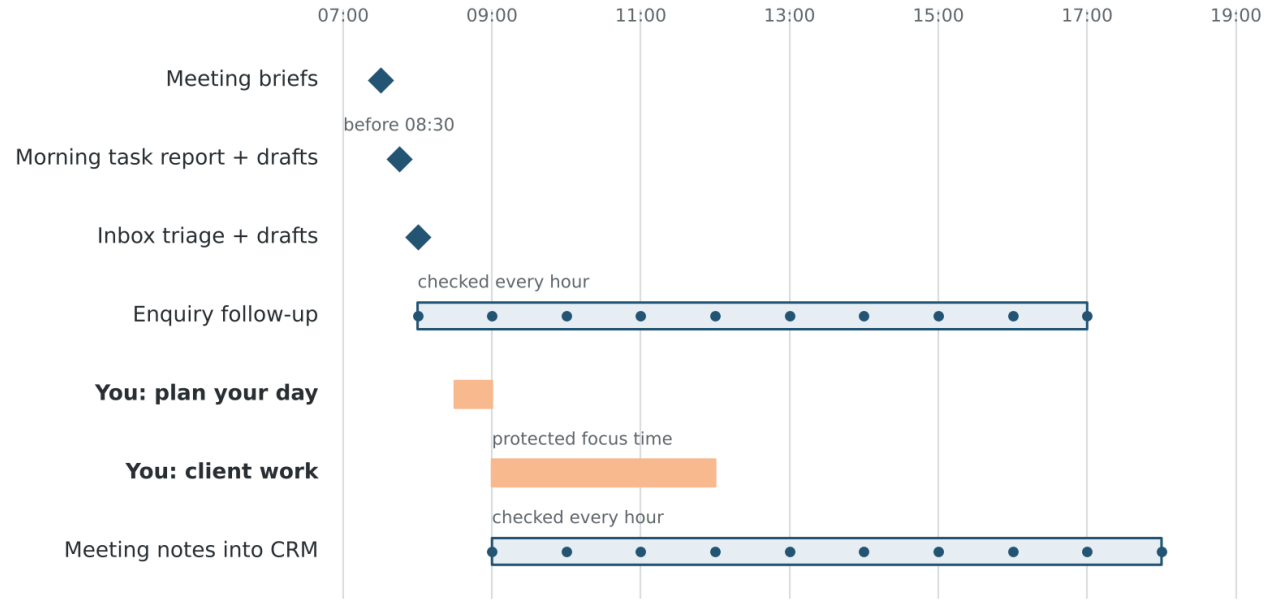
Opportunities stall at “I'll send something over” because there's never a clear block to write it.

Walking into meetings cold

Five minutes before a call you're searching emails to remember what was last agreed.

What it does: a daily and weekly rhythm

A set of scheduled routines runs in the background and reports to you once, in plain English. Nothing is sent, deleted or overwritten without you.



An illustrative weekday. Navy = routines running for you; peach = time protected for you.

Routine	When	What it does for you
Morning task report	Every weekday, before you start	Overdue and due-today CRM tasks in one list, the three that matter most, and emails already drafted for follow-ups.
Inbox triage	Every weekday morning	Sorts new email into Urgent, This week, FYI and Low priority, with draft replies to the urgent ones.
Enquiry follow-up	Hourly in working hours	Every new website or email enquiry, and every introduction, gets a same-day follow-up task in your CRM.
Meeting briefs	Every weekday morning	Who you're meeting, your history with them, open opportunities and 2–3 points to raise.
Meeting notes into CRM	Hourly	Recorded meetings become CRM notes, follow-up tasks and proposed new contacts and deals.
Weekly pipeline review	Monday morning	Every open deal without a next step gets one; stale deals and overdue close dates are flagged.
Focus-time planner	Sunday evening	Books protected blocks for client work, proposals and follow-ups around your meetings.
Industry news digest	Daily or weekly	Relevant changes from the suppliers, platforms or sector news you care about.

Works with what you already have. Most popular CRMs (for example Capsule, HubSpot, Pipedrive, Zoho), Google Workspace or Microsoft 365 for email and calendar, and common meeting note-takers. Compatibility is confirmed in the discovery call before you commit.

How we get there

Four to six weeks from first call to a rhythm that runs on its own.

1 **Rhythm discovery** · **Week 1**
A 90-minute session to map how enquiries, meetings and follow-ups really flow today, which tools you use, and where time leaks.

2 **Design** · **Week 1–2**
A one-page rhythm plan: which routines, when they run, what they may and may not touch, and your working pattern for focus time.

3 **Build and connect** · **Week 2–3**
Routines set up and connected to your CRM, email, calendar and meeting notes, with your categories, pipelines and tone of voice.

4 **Approve-first trial** · **Week 3–5**
For two weeks new contacts and deals are proposed, not created. You approve with a one-word reply while we fine-tune.

5 **Hand over and Rhythm Care** · **Ongoing**
Switch to automatic where you're comfortable. Rhythm Care keeps every routine accurate as your business changes.

You stay in control

Drafts, never sends
Emails are drafted for you to review. Nothing goes out in your name without your click.

Adds, never overwrites
New tasks and notes are added; existing records are not edited or deleted.

Facts only
Everything comes from your own CRM, inbox and meetings. Gaps are left as clear placeholders.

Your accounts, your data
Routines run on your own subscriptions. You can pause or remove them at any time.

What changes for your business

Every enquiry followed up the same day
Speed of response is often the difference between winning and losing a lead.

A CRM that stays current
Meetings, enquiries and follow-ups land in the CRM automatically, so the pipeline you see is the pipeline you have.

Mornings that start with a plan
One message with what's overdue, what's due and what matters most, with drafts ready to send.

More time for paid work and proposals
Focus time is booked for you and protected from the inbox.

Networking that turns into business
Every conversation gets a follow-up task on the day, not when you next remember.

Independent advice
Built around your tools and process, not a vendor's sales target.

A simple test: if the rhythm saves you five hours a week and your time is worth £60 an hour, that's about £1,300 of owner time a month. Your own figures are worked out together in the discovery call.

Who it's for

- Owner-led businesses of 1–10 people where the owner still wins most of the work.
- Firms that already have a CRM but find it drifting out of date.
- Businesses that win work through enquiries, introductions and networking, and lose it when follow-up slips.
- Owners who want more time for client work and proposals, not another system to learn.

Pricing

Fixed prices, three levels. Choose the one that fits today; moving up later is straightforward.

Essentials

Stop enquiries going cold

£1,450

one-off set-up

£195 / month

Rhythm Care

- ✓ Enquiry follow-up: every new enquiry gets a same-day CRM task
- ✓ Morning task report with drafted emails
- ✓ Inbox triage with drafted replies
- ✓ 1 user, 3 connected tools
- ✓ Approve-first trial (2 weeks)

Growth

Recommended · the full rhythm

£2,950

one-off set-up

£295 / month

Rhythm Care

- ✓ Everything in Essentials
- ✓ Meeting briefs before each meeting
- ✓ Meeting notes turned into CRM notes, tasks and new contacts
- ✓ Weekly pipeline review
- ✓ Weekly focus-time planner
- ✓ Industry news digest
- ✓ 1 user, up to 6 connected tools
- ✓ Monthly summary of what ran

Team

For owner + team

from £4,500

one-off set-up

from £450 / month

Rhythm Care

- ✓ Everything in Growth
- ✓ **AI Oversight included**
- ✓ Up to 5 users, each with their own rhythm
- ✓ Shared pipeline review for the owner
- ✓ Custom tasks for your process
- ✓ Quarterly rhythm review

- 50% of the set-up fee is payable to book, the balance at hand-over. Rhythm Care is billed monthly in advance, with a 3-month minimum.
- **Rhythm Care** keeps your routines running: it checks they ran, fixes anything that breaks when a tool changes and adjusts what they flag or draft.
- **Add AI Oversight** (an independent monthly review of all AI in your business) to Essentials or Growth for £150/month instead of £400 standalone. Included in Team.
- Your own software subscriptions (CRM, email, meeting note-taker and AI assistant plan) are paid directly by you.
- No CRM yet, or not sure yours is right? Start with the **Fit-First Plan** and we'll build the rhythm around the right system.

Book a free 30-minute rhythm check

We'll look at how enquiries and follow-ups flow in your business today and whether the CRM Rhythm is a fit. simon.reed@sjr.digital · sjr.digital