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Leading Stellar CX

Customer Relationship Management (CRM) tools for leaders of small businesses

A basic starter guide from a fellow small business user perspective

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CRM (Customer Relationship Management) basics for small businesses.

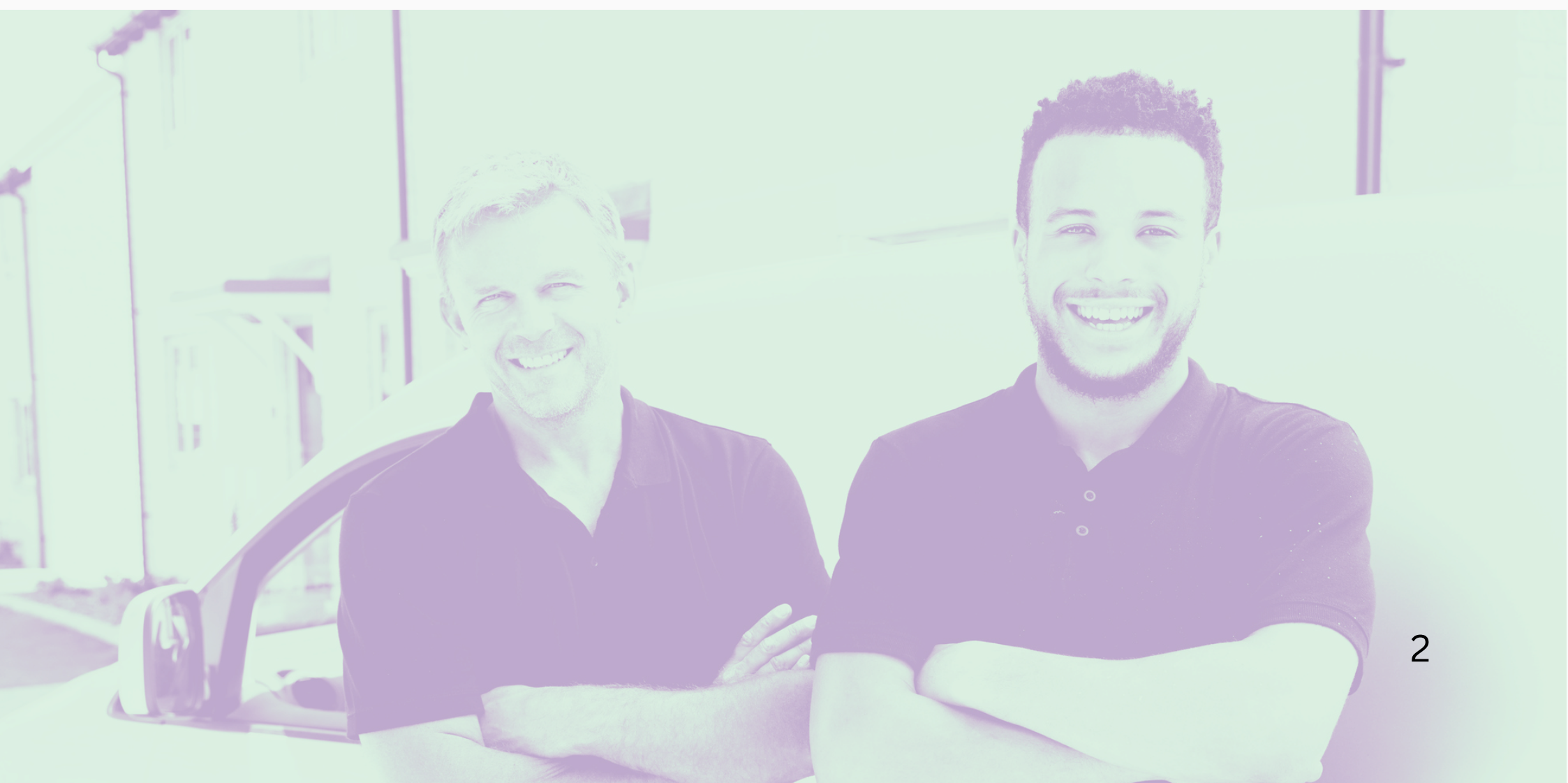
When you run or work for a smaller business (SME) it can be difficult to stay on top of the evolving technologies available to help you run your business more efficiently and effectively. Being heavily involved in the day to day and often working across many different functions, leaves little time to research and learn the options. It can feel easier to continue working as we've always done, manually recording customer data and memorising when to reconnect.

However, whilst that approach can feel easier in the short-term, long-term it means we may miss out on opportunities to automate the mundane, simple tasks. Using customer relationship management (CRM) can allow us to focus our significant expertise and precious time where it will have maximum impact, to deliver excellence to our customers and grow our business.

CRM helps businesses manage customer relationships, sales, and follow-ups more efficiently. It is by no means a new technology! However, there are constant evolutions to the functionality and availability of the different platforms, hence why, I felt it would be well worth summarising into a simple article.

My hope is that this may help those running smaller businesses to have the confidence to explore the options in full and benefit from the process efficiency and improved customer experience that such platforms can bring.

The fact that many offer free CRM starter options, is even better! This allows you to try out some of the functionality without commitment.





What is CRM?

CRM refers to both a business strategy and the software systems that are used to manage interactions with customers and potential clients or leads.

CRM helps businesses to:

- Store customer data (such as contacts, purchase history, customer preferences)
- Track sales leads.
- Manage marketing campaigns.
- Improve customer support and service.
- Analyse customer behaviour to improve sales, retention and advocacy.
- Collect and manage on-line reviews/customer feedback.

How CRM works:

A CRM system acts like a central database where every interaction with a customer is recorded. That could be emails, phone calls, meetings, purchases, returns, complaints and preferences on contact methods, frequently purchased items, or delivery preferences. It acts as a failsafe to ensure you don't miss out key details for your customer and it avoids them having to repeat themselves each time they make contact with you. If you have a number of employees and departments, it allows everyone within the business to all have the most up to date, shared view of the customer.

Importantly, using this rich customer data also allows you to personalise your approach to the customer, for example, you might pre-empt their needs and send a special offer just as they are about to run low on a product or require a service update. Or you might identify a key time when they are likely to be busy or stressed and value extra support, such as the birth of a child, house move or retirement.

How could CRM benefit my business?

Small businesses can use these free CRM platforms in practical, everyday ways to organise customers, automate follow-ups, and avoid losing sales opportunities.

I've included a few diverse examples below:

High Street Retail Store:

Uses CRM to:

- Store customer contact information.
- Track purchase history.
- Send birthday and customer sign-up anniversary discounts.
- Follow up with customers who asked about out of stock items or new product launches.

How they use CRM:

1. Customer signs up at checkout .
2. CRM records email + products purchased.
3. Owner sends monthly promotions to repeat buyers.
4. CRM reminds staff to contact VIP customers before new arrivals launch.

Benefit:

More repeat customers without manually tracking spreadsheets. Greater chance of success with new product launches, sales, and events.





Plumbing Business:

Uses CRM to:

- Manage their service requests.
- Keep customer informed of visits.
- Collect customer reviews afterwards.

How they use CRM:

1. Track incoming leads from Facebook and Google.
2. Assign jobs to plumbers.
3. Set reminders for annual maintenance follow-ups.
4. Store customer addresses and past issues.
5. Send review requests to customers post service.

Example

A customer had a boiler repaired last year.

The CRM automatically reminds the business to contact them 11 months later for a maintenance service.

Benefit: Generates recurring business and improves customer retention and advocacy (recommendations).

Estate Agent:

An estate agent uses CRM to track:

- Property preferences.
- Viewing schedules.
- Follow-up reminders.
- Buyer budgets and timelines.

Example

When a new property is listed, the agent filters buyers interested in 3 bedroom homes, under £500k within a certain area. Sends targeted emails instantly.

Benefit: Faster matching and better client experience.

Fitness Studio:

A fitness studio uses CRM to:

- Track trial members.
- Schedule consultations.
- Automate membership renewals.
- Send class reminders.

How they use CRM

1. Someone attends a free trial class:
2. CRM creates a lead.
3. Trainer gets reminder to call next day.
4. Automated email sends membership pricing.
5. CRM tracks whether they joined.

Benefit: More conversions from trial users.

E-commerce Store:

A small Shopify seller connects their store with CRM.

CRM helps them:

- Recover abandoned carts.
- Segment loyal customers.
- Track customer support issues.
- Send personalised offers.

How they use CRM

Customers who bought running shoes receive:

1. Sock recommendations.
2. Maintenance tips.
3. Future discounts.

Benefit: Increased average order value and repeat purchases.



Selecting the right platform for your business:

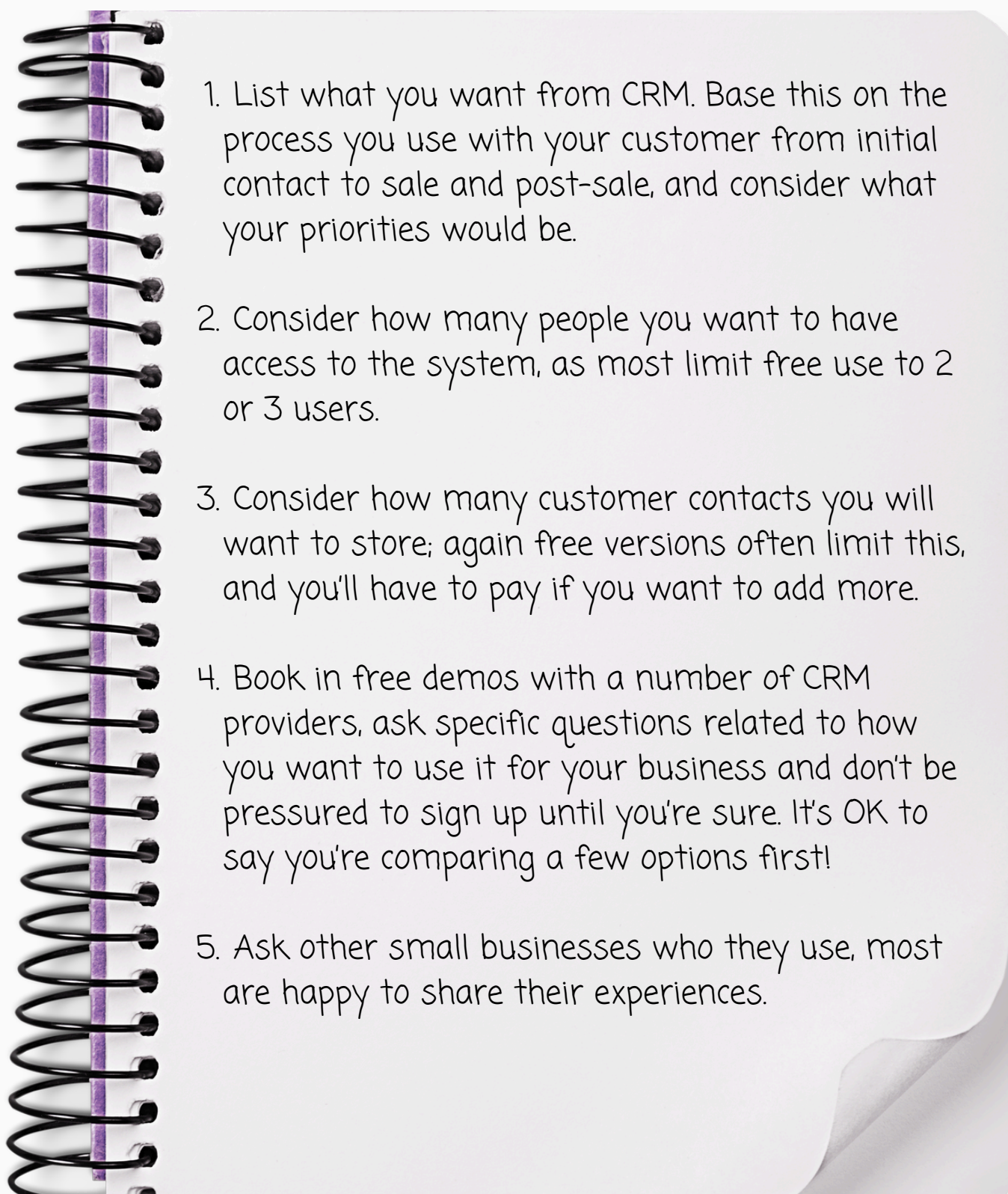
I will just state at this point that I have no affiliation or links to any of the platforms I mention, these are purely my own views and experiences as a small business owner, and those of other businesses I have worked with, plus information from my own research.

This is intended for people in smaller businesses, who aren't currently using CRM. For larger businesses with more complex needs, there are some fantastic solutions on offer now, with the capability of providing phenomenal insights and customer opportunities. However, that's a whole other article, and one I'll bring a few technical experts in for!

I'd always recommend that you do your research and speak to a number of providers, before making a final decision.

Setting priorities:

If you do decide to go ahead with CRM, I would strongly recommend starting off by making a list:



CRM platform options :

You've most likely heard of the most widely used CRM tools out there:

Salesforce

Salesforce is one of the most popular CRM platforms, a number of businesses that I work with use it and generally speak highly of it. Although I would say that many admit to not utilising the functionality of the platform to its full potential. I think this speaks to the fact that if we invest in a platform, it's essential that we, or one of our team, learn it, own it and keep up to date with developments and upgrades.

Techradar.com voted salesforce as their number 1 recommendation for small businesses in 2026. Their main reasoning is the sales-focused intuitive interface and the fact that you can customize features like dashboards and reports to match your business needs and personalise the user experience. It also boasts features to streamline sales and business processes, including internal communication tools like on-screen calls, creation of a client knowledge base to help with staff training, data export, email templates, and third-party tool integration.

Salesforce also now offers a genuinely free CRM package called **Free Suite**, which they promise is "Free forever" (not just a trial). It allows up to 2 users and includes: lead & contact management, opportunity tracking, basic dashboards & reporting, case management/customer support tools, simple email marketing and some built-in AI features. As with a number of these free offers now, you don't have to give your credit card detail to start, which takes the worry out for many of us, who've fallen foul of hard to cancel auto-renewing sign-ups in the past!

Salesforce can become more costly if you want to start adding advanced automation and integrations, for example, and the other thing to bear in mind is that it can still feel more complex to use than tools like HubSpot CRM or Zoho CRM for very small businesses.

In terms of cost: Free Suite includes the simple CRM suite with sales, service, and marketing for a maximum of 2 users. Starter Suite is £20 user/month. This offers connected CRM for small teams with sales, service, marketing, and commerce in one system. Pro Suite is £80 user/month. This is a customisable CRM with advanced automation, AI, and insights.





CRM platform options :

Hubspot

Hubspot is another name you'll most likely have heard. It's known for being an easy to use CRM system with marketing tools. I'm currently using it and I know a couple of small businesses who are using the free version. Like me, they tend to use it to store customer leads and manage communications, such as marketing emails and updates to clients and find it really useful for this.

The free version offers up to 1000 contacts and makes it easy to segment these contacts into lists. You can also create stages in the platform to mirror your own sales or marketing processes to ensure you don't miss critical stages and communications for the customer.

Hubspot offers web visitor tracking and email tracking and templates. Email functionality can be integrated with Gmail and Outlook. You can track and report on emails, including seeing who has opened, clicked a link or downloaded a document.

The paid version offers sales automation, lead scoring and custom reporting, but in all honesty the free version is a great starter option for most small businesses.

The paid versions start at £18-£25 per user/month, up to £135-£150+ per user/month for the Enterprise version.

Zoho

Zoho, scores highly in a number of reviews. It's reported to be a powerful cloud-based CRM software with excellent customer management and lead generation tools. The software features the ability to search social media platforms like LinkedIn to capture new customer contacts, scan business cards, and provide automated workflows to assist sales teams. Zoho also offers reporting, client contact and communication records, website visitor segmentation, and lead pipeline management.

Zoho CRM also has the advantage of seamless integration with other Zoho tools, including the Zoho sales, marketing, project management, invoice and campaigns. Overall, advanced Zoho CRM looks like it could prove pricey, and be over-kill for very small businesses, but the free plan looks solid.

The free version allows up to 3 users. Pricing for the standard package starts at £12-£16 per user/month, up to £45-£55 per user/month for their "Ultimate" package.

CRM platform options :

Bitrix24

Bitrix24 has a distinct advantage on pricing for medium sized businesses with multiple users, as it is one of the few offers with a flat rate pricing, it charges per organisation, not strictly per user.

Whilst the free version is limited to 1-2 users to try the platform, the standard rate of £107/per month allows up to 50 users and the Professional 100 users for £215/month. It offers CRM, project management, internal chat and sales pipeline tools.

However, users report a more complex interface than Zoho and Hubspot, meaning it wouldn't be my top recommendation for very small companies, but if you have a larger team it could be worth a look.

Freshsales

Freshsales is a sales-focused CRM, reportedly used by NHS-related suppliers, Cisco, Honda and Rightmove in the UK. Its Free plan is designed for startups and small teams that want a proper CRM without paying immediately. The free version allows up 3 users, contact and account management, lead tracking, sales pipeline, email integration, built-in phone/dialler, mobile app access, basic reporting dashboards, Kanban-style deal management and built-in chat features, as well as lifecycle stages for leads.

People have spoken to me about the advantages of Freshsales built-in communication tools, like the phone dialler, for example, which aren't included in many other free packages. Some people mentioned that it's easier to set up and learn than Salesforce, for example.

The free plan covers up to 3 users, the paid plan starts at roughly £7 per user/month up to £62 per user/month for the Enterprise version.



In Conclusion:

The above isn't an exhaustive list, there is of course Microsoft Dynamics, arguably, more suited to larger organisations, Pipedrive, Agile and Zendesk are others. The best choice will depend entirely on your business needs, user type and budget.

If you aren't using a CRM system yet, I'd recommend that you short-list the providers most suitable to your needs, once you've created your CRM priority list and then book in some free on-line demos.

CRM provides a fantastic tool to keep all your customer information organised. It can keep track of sales leads and deals and send reminders and follow-ups, to avoid missed sales opportunities.

Automating emails and communications can save considerable time, allowing you to invest that time back in your business, or give yourself some well-deserved breathing space! And having clear visibility of customer history, preferences and tasks, allows you to provide efficient and highly personalised services to your customers, setting you apart from the competition.

If you need help mapping out your customer process first or identifying where CRM may add greatest benefit to you and your customers, get in touch for a free introductory chat with Stellar CX.

Expert advice from founder Gem Jones BA (Hons) CXAD (Dip) Stellar CX



Combining over two decades of business expertise and experience within large manufacturing organisations with formal CX learning, our founder Gem Jones developed the Stellar CX Senior Leadership Programme to help businesses de-code CX and overcome the challenge of developing a CX strategy that is highly relevant, achievable and cost effective, whilst maximising opportunities to grow customer loyalty, acquisition and lifetime value.



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