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THE CUSTOM CRM BLUEPRINT

Plan your pipeline, fields, lead scoring and follow-up before you choose any CRM.

V1.0, NOVEMBER 2026

HOW TO USE THIS BLUEPRINT

This is a plan, not software. It walks you through the decisions that make any CRM work: the stages a deal moves through, the details you record, how you rank leads, and how you follow up. Make those decisions on paper first and the software choice gets much easier.

You do every step here by hand. Nothing in this blueprint runs on its own. It works with whatever you track customers in today: a spreadsheet, a notebook, free CRM software, or a custom system someone builds for you.

Work through it in order. Each chapter gives you a starting set you can copy, then asks you to change it to fit how you sell. Chapter 8 is a one-page worksheet where you write down your final choices.

What's inside

1. Free CRM software or a custom CRM: how to decide
2. Pipeline stages, with entry and exit rules
3. The fields to record for contacts, companies and deals
4. Lead-scoring rules you set yourself
5. A customer-journey map
6. A follow-up guide, and the automations to set up in your CRM
7. A decision checklist with a simple score
8. Your one-page worksheet

A note on the examples

Every example in this blueprint (stage names, point values, timings) is a starting point for you to edit. None of them is a benchmark or a target. The right numbers for your business are the ones you choose, check against what happens, and adjust.

1. FREE CRM SOFTWARE OR A CUSTOM CRM: HOW TO DECIDE

There are three honest ways to start, and each one suits a different business.

- **Free CRM software.** Ready-made software you sign up for and log into. You can start the same day. A free tier can come with limits on contacts, users, features or support. Check what your chosen tool limits before you load your customer list.
- **A custom CRM.** A system built around your process, by a developer or by heavily configuring a flexible platform. It fits the way you work, and it costs money and time to build and keep running. You depend on whoever builds and maintains it.
- **A spreadsheet.** Free and flexible. Nothing is built in, so reminders and reports only exist if you set them up yourself.

The trade-offs, side by side

QUESTION	FREE CRM SOFTWARE	CUSTOM CRM	SPREADSHEET
How soon can I start?	The same day you sign up	After it is built, which depends on scope	Today
What does it cost?	Check the price and what the free tier includes, and what paid tiers cost	A build cost, then ongoing upkeep	Nothing
Does it fit my stages?	You may need to fit your process to its settings	It is built around your stages	It fits whatever you set up

QUESTION	FREE CRM SOFTWARE	CUSTOM CRM	SPREADSHEET
What is limited?	Check the limits on contacts, users, features and support	Anything that wasn't built	Only by what you set up; nothing is built in
Where does my data live?	Check where the provider stores it and under what terms	Wherever you or your builder host it	In your own file
Can I take my data with me?	Check the export options before you load anything	Ask for a full export option as part of the build	Yes, it is your file
Reminders and automations	Check which are included on your plan	Only the ones that were built	Only the ones you set up yourself

When free software is the better answer

- You need a login today and your process is simple.
- Your stages fit the software's settings without much bending.
- One or two people update records.
- You are still working out how you sell, and you want something cheap to learn on.

When a custom CRM is worth a look

- You have tried off-the-shelf tools and keep working around them.
- Your process has steps that ready-made software doesn't handle, such as site visits, multi-stage approvals or recurring contracts.
- You have the budget to build it and to keep it maintained.
- You want full control over where your data lives and how it is structured.

Either way, start with this blueprint

Free or custom, the software only works as well as the plan you give it. A clear set of stages, fields and follow-up rules makes free software easier to set up and makes a custom build cheaper to specify. Write down how a deal really moves through your business. The software comes second.

2. PIPELINE STAGES

A pipeline stage is a step where a deal waits for something to happen. Good stages have clear rules: you can say exactly when a deal enters a stage and exactly what moves it on. If two people would put the same deal in different stages, the rules need tightening.

A default stage set

Start with these seven. Rename, merge or add stages to match how a deal moves in your business.

STAGE	A DEAL ENTERS WHEN	A DEAL LEAVES WHEN	YOUR NEXT ACTION
1. New lead	Someone gets in touch or you get a referral, and you have a way to reach them	You have replied and made first contact	Reply and log how they found you
2. Contacted	You have spoken or written to them at least once	You know whether they are a fit, or they stop replying	Ask your qualifying questions
3. Qualified	They need what you sell, can afford it, and can make the decision (or you know who can)	You send a quote or proposal	Gather what you need to price the work

STAGE	A DEAL ENTERS WHEN	A DEAL LEAVES WHEN	YOUR NEXT ACTION
4. Quote sent	They have your quote or proposal in hand	They say yes, say no, or ask to change it	Follow up on the date you set
5. Deciding	They are comparing options, negotiating, or waiting on someone else to approve	They give a final answer	Answer questions; confirm the decision date
6. Won	They have agreed in writing or paid a deposit	The work is handed over to delivery	Send the welcome or kick-off message
7. Lost	They said no, went quiet past your cut-off, or turned out not to be a fit	Never (closed), unless they come back as a new lead	Record the reason lost

Rules that keep a pipeline honest

- **One stage per real hand-off.** Add a stage only where a deal waits on someone and can stall. Fewer clear stages beat many vague ones.
- **Every open deal has a next step and a date.** If you can't name the next step, the deal is either stuck or lost.
- **Deals move forward or close.** If a deal goes backwards (for example, a new quote after changes), move it back to the earlier stage and note why.
- **Lost is a stage, not a deletion.** Keeping lost deals, with reasons, is how you learn what to change.

Reasons lost (edit this list)

Pick one reason for each lost deal so you can count them later: Price / Timing / Chose another provider / No reply / Not a fit / Other (write it in).

3. FIELDS TO TRACK

Fields are the details you record. Record too little and you can't follow up; record too much and nobody fills it in. Start with the required fields below and add optional ones only when you will act on them.

Contact fields (a person)

FIELD	TYPE	WHY IT MATTERS	REQUIRED?
Full name	Text	So you know who you are talking to	Yes
Email	Email	Your main way to follow up	Yes, or phone
Phone	Phone	For calls and texts	Yes, or email
Company	Link to a company	Connects the person to the business they buy for	If they buy for a business
Role or job title	Text	Tells you whether they decide or recommend	Optional
Lead source	Dropdown	Shows which channels bring you customers	Yes
Preferred contact method	Dropdown	Follow up the way they like to be reached	Optional
Consent to marketing	Yes/No, with date	Records permission before you send marketing; check the rules that apply where you trade	Yes, if you send marketing
Notes	Long text	Anything you need to remember next time	Optional

Company fields (a business you sell to)

FIELD	TYPE	WHY IT MATTERS	REQUIRED?
Company name	Text	Groups contacts and deals together	Yes
Location or service area	Text or dropdown	Tells you whether you can serve them	Yes, if you work locally
Industry or type	Dropdown	Helps you spot which customers suit you	Optional
Size	Dropdown (your own bands)	Helps you price and qualify	Optional
Website	Link	Quick background before a call	Optional
Account owner	Person	Who looks after this customer, if more than one person sells	If more than one person sells

Deal fields (one opportunity)

FIELD	TYPE	WHY IT MATTERS	REQUIRED?
Deal name	Text	Short label, such as "Kitchen refit, Smith"	Yes
Contact	Link to a contact	Who you are dealing with	Yes
Stage	Dropdown (your stages from Chapter 2)	Where the deal is right now	Yes
Value	Currency	What the deal is worth if won	Yes, from Qualified onward
Expected close date	Date	When you expect a decision	Yes, from Quote sent onward
Next step	Text	The one thing that moves the deal on	Yes
Next step date	Date	When you will do it	Yes
Lead score	Number	From your rules in Chapter 4	Optional
Date entered current stage	Date	Lets you spot deals that have stalled	Yes, if your CRM doesn't track it
Reason lost	Dropdown	Your list from Chapter 2	Yes, when Lost

Tip: Dropdowns beat free text for anything you want to count later, such as lead source, stage and reason lost. Free text is fine for notes.

4. LEAD-SCORING RULES

Lead scoring is a simple way to decide which leads to call first. You give each lead points for things that make them a good fit and for signs that they are ready to buy. Add the points and the total tells you where to spend your time.

You set the rules. The point values below are examples to edit, not recommendations.

Example points (set your own)

SIGNAL	TYPE	EXAMPLE POINTS
In your service area or market	Fit	+2
Budget matches your price range	Fit	+3

SIGNAL	TYPE	EXAMPLE POINTS
Talking to the person who decides	Fit	+2
The kind of customer you serve well	Fit	+2
Asked for a quote or price	Interest	+3
Booked a call or visit	Interest	+3
Referred by a current customer	Interest	+2
Replied to your last message	Interest	+1
Outside your service area	Fit	-3
Needs something you don't offer	Fit	-3

Example bands (set your own cut-offs)

BAND	EXAMPLE SCORE	WHAT YOU DO
Hot	8 or more	Contact first; aim to qualify on the next call
Warm	4 to 7	Follow your normal follow-up steps
Cold	3 or less	Keep in touch occasionally, or close as not a fit

How to keep scores useful

- **Score when you qualify.** Add points at the Contacted or Qualified stage, when you know enough to judge.
- **Check your rules against results.** Once a month, look at the deals you won and lost. If cold leads keep winning, or hot leads keep going quiet, change the points.
- **Keep it short.** A short list of signals you can judge quickly beats a long list nobody fills in.

Setting it up

In a spreadsheet, add a "Lead score" column and a "Band" column and fill them in when you qualify a lead. In a CRM, add a number field for the score and a dropdown for the band. Some CRMs can add up points for you once you enter the rules; look for "lead scoring" in the settings, and check the result on a few leads by hand before you trust it.

5. CUSTOMER-JOURNEY MAP

Your pipeline shows the deal from your side. The customer-journey map shows it from theirs: what they are doing, where they meet you, and what you do in return. Mapping it helps you spot gaps, such as a step where customers wait and hear nothing.

A starting map (edit it to match your business)

CUSTOMER STEP	WHAT THE CUSTOMER IS DOING	WHERE THEY MEET YOU	WHAT YOU DO	YOUR PIPELINE STAGE
Notices you	Searching, asking around, seeing your work	Website, referral, listing, social post, signage	Make it easy to get in touch	(before New lead)
Gets in touch	Asking a first question	Form, email, phone call, message	Reply and log the lead	New lead
Checks you out	Deciding whether you are right for them	Your reply, a call, reviews, examples of past work	Ask qualifying questions; share relevant examples	Contacted, Qualified

CUSTOMER STEP	WHAT THE CUSTOMER IS DOING	WHERE THEY MEET YOU	WHAT YOU DO	YOUR PIPELINE STAGE
Weighs it up	Comparing your quote with other options	Your quote, follow-up messages	Follow up on the date you set; answer questions	Quote sent, Deciding
Says yes	Agreeing, signing, paying a deposit	Contract, invoice, welcome message	Confirm next steps and dates	Won
Gets the work	Receiving what they paid for	Delivery, updates, the finished job	Keep them updated; check they are happy	(delivery)
Comes back or refers	Buying again or recommending you	A check-in, a review request, a repeat offer	Ask for a review or referral; stay in touch	New lead (repeat or referral)

Map your own in three steps

1. **List your touchpoints.** Write down every place a customer meets you, from first search to final invoice.
2. **Find the silent gaps.** Mark any step where the customer waits and hears nothing from you. Each one is a place to add a follow-up step.
3. **Link each step to a stage.** Every journey step should have a matching pipeline stage, or a note saying it happens outside the pipeline (such as delivery).

6. FOLLOW-UP GUIDE AND AUTOMATIONS TO SET UP

Follow-up is where deals can stall quietly. The aim is simple: no open deal sits without a next step, and no customer waits without hearing from you.

Follow-up rules (choose your own timings)

MOMENT	YOUR RULE	EXAMPLE TIMING (EDIT)
A new lead arrives	Reply and make first contact	Same working day
After first contact	Ask your qualifying questions	Within the first conversation
Quote sent	Check they received it and offer to talk it through	2 working days after sending
No reply to a quote	Follow up again, by a different method if you can	5 working days after the first check-in
Still no reply	Send a final, friendly close-out message	10 working days after sending
After the close-out	Move the deal to Lost, reason "No reply"	When the close-out goes unanswered
Deal won	Send a welcome or kick-off message	The day they agree
Work delivered	Check they are happy; ask for a review or referral	When the job is finished

Messages you write

Write these once and reuse them. Keep them short and personal.

- **Quote check-in:** "Hi [name], just checking the quote for [job] reached you. Happy to go through any part of it. Would [day] work for a quick call?"
- **Second follow-up:** "Hi [name], following up on [job]. If the timing or scope needs to change, tell me and I'll adjust the quote."
- **Close-out:** "Hi [name], I haven't heard back, so I'll close this for now. If [job] comes up again, just reply here and we'll pick it up."

Automations to set up in your CRM

These are features you may be able to switch on and configure, if your CRM offers them. Names differ between products: look for "workflows", "rules", "sequences", "tasks" or "reminders" in the settings. Test each one on a deal of your own before you rely on it.

AUTOMATION	THE TRIGGER YOU CHOOSE	WHAT YOU SET THE CRM TO DO	WITHOUT A CRM
New-lead reminder	A new lead is added	Create a task to reply, due the same working day	Calendar reminder each morning to check new enquiries
Stage-change task	A deal moves to a new stage	Create the next-step task for that stage, with a due date	Update the "Next step date" column when you change a stage
Quote follow-up reminder	A deal enters Quote sent	Create follow-up tasks on the dates from your rules	Add the follow-up dates to your calendar when you send the quote
Stale-deal flag	A deal has stayed in one stage longer than your limit	Flag or highlight the deal, or add it to a "stalled" view	Sort by "Date entered current stage" each week
Missing next step	An open deal has no next-step date	Show it in a "needs attention" list	Filter for blank next-step dates each week
Reason-lost required	A deal is moved to Lost	Require a reason before saving	Make "Reason lost" a column you always fill
Won handover	A deal moves to Won	Create a handover checklist or task for delivery	Copy a handover checklist into your notes
Repeat check-in	A set time after a job is delivered	Create a task to check in or ask for a review	Calendar reminder on the date you choose

A word of caution: automations follow your rules exactly, including the mistakes. Start with two or three, check they behave as you expect, then add more.

7. DECISION CHECKLIST

Tick every statement that is true for your business today. Then add up each part.

Part A: points toward free CRM software

- ☐ I need a login I can use this week.
- ☐ My stages fit a standard pipeline without much change.
- ☐ One or two people update customer records.
- ☐ My follow-up is roughly the same for every customer.
- ☐ I don't have a budget for building software right now.
- ☐ I am still working out how I sell and expect it to change.

Part A total: ___ of 6

Part B: points toward a custom CRM

- ☐ I have tried ready-made CRM software and keep working around it.
- ☐ My process has steps a standard pipeline doesn't handle (site visits, approvals, recurring contracts).

- [ ] I need fields or reports that ready-made tools don't offer.
- [ ] I have a budget to build it and to keep it maintained.
- [ ] I want full control over where my customer data lives.
- [ ] I can write down my deal stages right now, and they are stable.

Part B total: ___ of 6

Reading your score

- **Part A is 2 or more points higher than Part B.** Start with free CRM software. Set it up using Chapters 2 to 6 and check the free tier's caps before you load your list.
- **Part B is 2 or more points higher than Part A.** A custom CRM is worth pricing. Take this blueprint to the conversation: your stages, fields and rules are the specification.
- **The two parts are within 1 point of each other.** Start with a spreadsheet or a free tier, follow this blueprint for three months, then take the checklist again.
- **You ticked fewer than 3 statements in total.** You may not need a CRM yet. If you can name every open deal and its next step from memory, a simple list works. Once follow-ups start slipping, come back to this blueprint.

Before you commit to any option

- [ ] I have checked how to export all my data if I switch.
- [ ] I know what the free tier or the build does not include.
- [ ] I have tested my stages on three real deals.
- [ ] I have decided who updates records, and when.

8. YOUR ONE-PAGE WORKSHEET

Fill this in by hand or copy it into a document. Keep it next to whatever you track customers in.

Business name: _____ Date: _____

My pipeline stages

#	STAGE NAME	A DEAL ENTERS WHEN	A DEAL LEAVES WHEN
1			
2			
3			
4			
5			
6			
7			

My reasons lost: _____

My required fields

Contact: _____

Deal: _____

My lead-scoring rules

SIGNAL	POINTS

Hot from ___ points. Warm from ___ points. Cold below ___ points.

My follow-up rules

First reply to a new lead within: _____

Quote check-in after: _____ Close-out after: _____

My first three automations (or reminders)

1. _____
2. _____
3. _____

My decision

Checklist score: Part A ___ Part B ___

I will start with: [ ] Free CRM software [ ] A custom CRM [ ] A spreadsheet

I will review this plan on: _____

WHAT TO DO NEXT

Pick one thing from your worksheet and set it up this week: your stages, your required fields, or your first follow-up reminder. Test it on real deals, then add the next piece. A plan you use beats a perfect plan you don't.

Talk your pipeline through. Once the blueprint is in use, you can talk it over with PureBrain, your own AI partner. Tell it about your deals in plain language, ask which leads to chase or how to word a follow-up, and pick up where you left off next week, because it remembers your conversations. You send every message and make every decision.

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