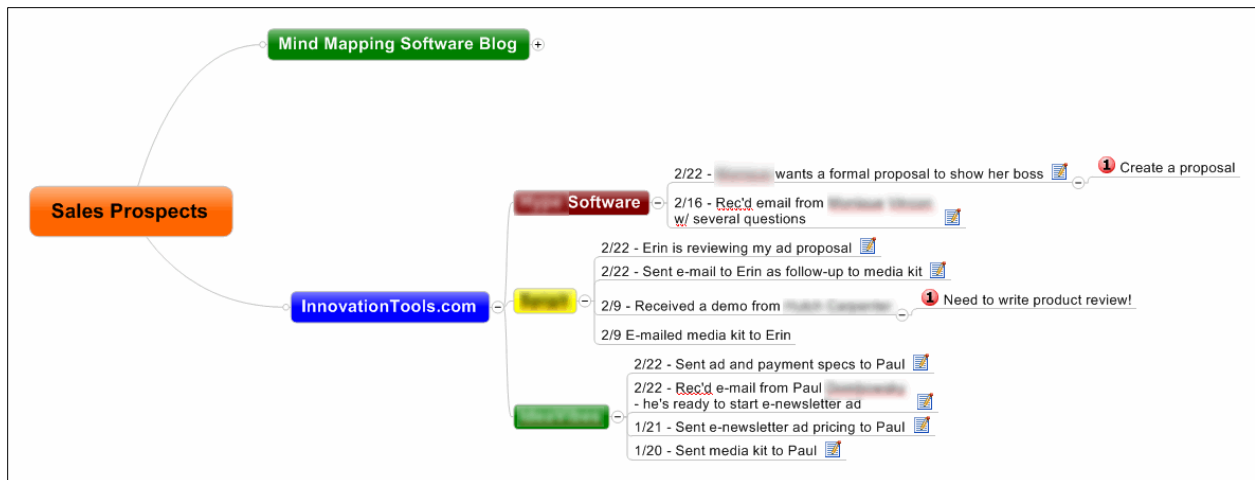




How to create a simple CRM mind map

If you deal with customers, prospects, strategic alliances, affiliates or other external business relationships in your job, you need to keep track of your conversations with them, and any commitments that you need to follow up on. For a small business, an enterprise-level customer relationship management (CRM) system is obviously overkill. And light weight apps like Basecamp, Infusion and Relenta aren't for everyone – I've never been able to find one that matches my workflow. Based on my own recent experience, mind mapping software seems to be a great match with my customer communication needs.



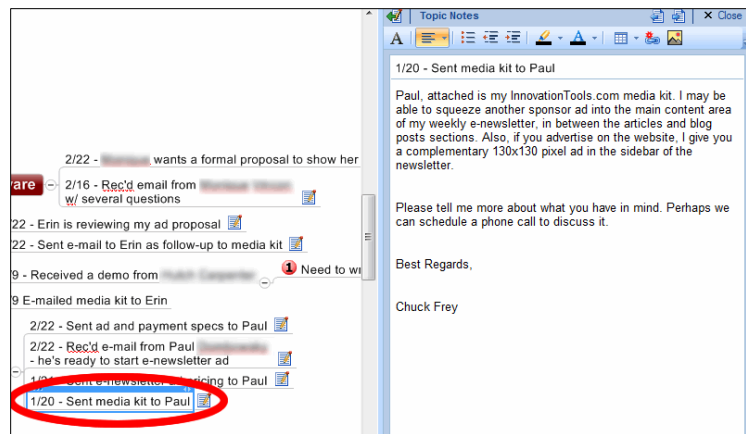
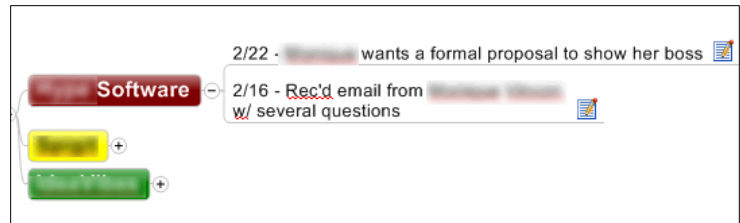
Since the first of the year, I have received many inquiries about advertising and sponsorship on my websites. I'm also entertaining several possibilities for strategic partnerships and joint projects. Normally, I just manage all of these relationships via my e-mail. But because of the increase in volume, I was letting opportunities fall between the cracks because I wasn't tracking them adequately. So I started to build a CRM mind map (above) to help me:

Here are some notes on the structure and functionality of this mind map:

First-level topics: This mind map currently has two first-level topics, Mind Mapping Software Blog and InnovationTools.com. These correspond to my web properties that have advertising on them. For you, they could be different product lines, business units, regions or other natural segments of your business.

Sub-topic text: I'm trying to keep this map simple, to avoid overwhelming myself with detail. So I decided early on that the sub-topics that contain the date and status of each "touch point" should summarize these events as briefly as possible. The details of each contact should be pushed down into topic notes and attachments. These descriptions may include:

- Notes summarizing a phone call with a prospect
- An spoken audio summary of a phone call with a prospect (some programs like XMind enable you to record audio notes and attach them to map topics)
- The text of an e-mail (either copy and pasted from your e-mail program, or if your mind mapping program integrates with Microsoft Outlook, you may be able to "send" individual e-mails to your mind map)
- A proposal, in the form of a document or spreadsheet



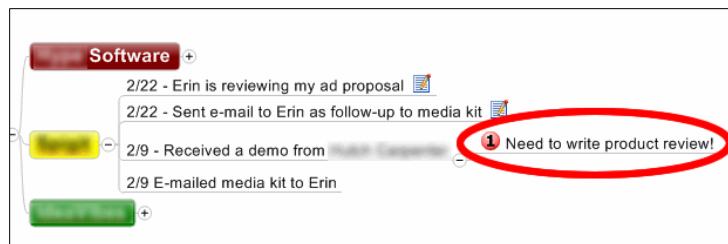
You get the idea. Mind maps provide you with an incredible amount of flexibility as to what you can attach to topics. Also note how collapsing the names of prospects whose records you're not viewing (in the top screen shot) helps to reduce visual clutter.

The order of sub-topics: Contact summaries flow from top to bottom, with the most current items at the top. This makes it easy to quickly scan my prospective advertisers and sponsors to see the status of each one, and which ones require attention.

Other meta data: I haven't added these elements to my CRM mind map yet, but here are some other ideas for enhancing yours:

- An org chart sub-map that visually summarizes the key people at each company, and who reports to whom.
- Attach vCards for each person or simply copy and paste or type in their contact information. That way, you have their phone number, cell number and mailing address handy when you need them.
- Proposal documents
- A copy of a PowerPoint presentation you gave to the customer or client
- Attach relevant photos to the prospect's record - say, perhaps of a problem with their product that you need to help them solve.
- Links to the LinkedIn profiles of your key contacts at each company
- Links to their websites, or key pages within them that provide one-click access to valuable information
- Attach a document that serves as a backgrounder, describing each company's mission, target markets and customers, and other relevant information.

Tasks: Note how easy it is to add tasks to your mind map that alert you to things you must follow-up on. To me, this is the biggest advantage of all, because it gives me a way to keep track of the things that I must do to move these prospects to become clients.

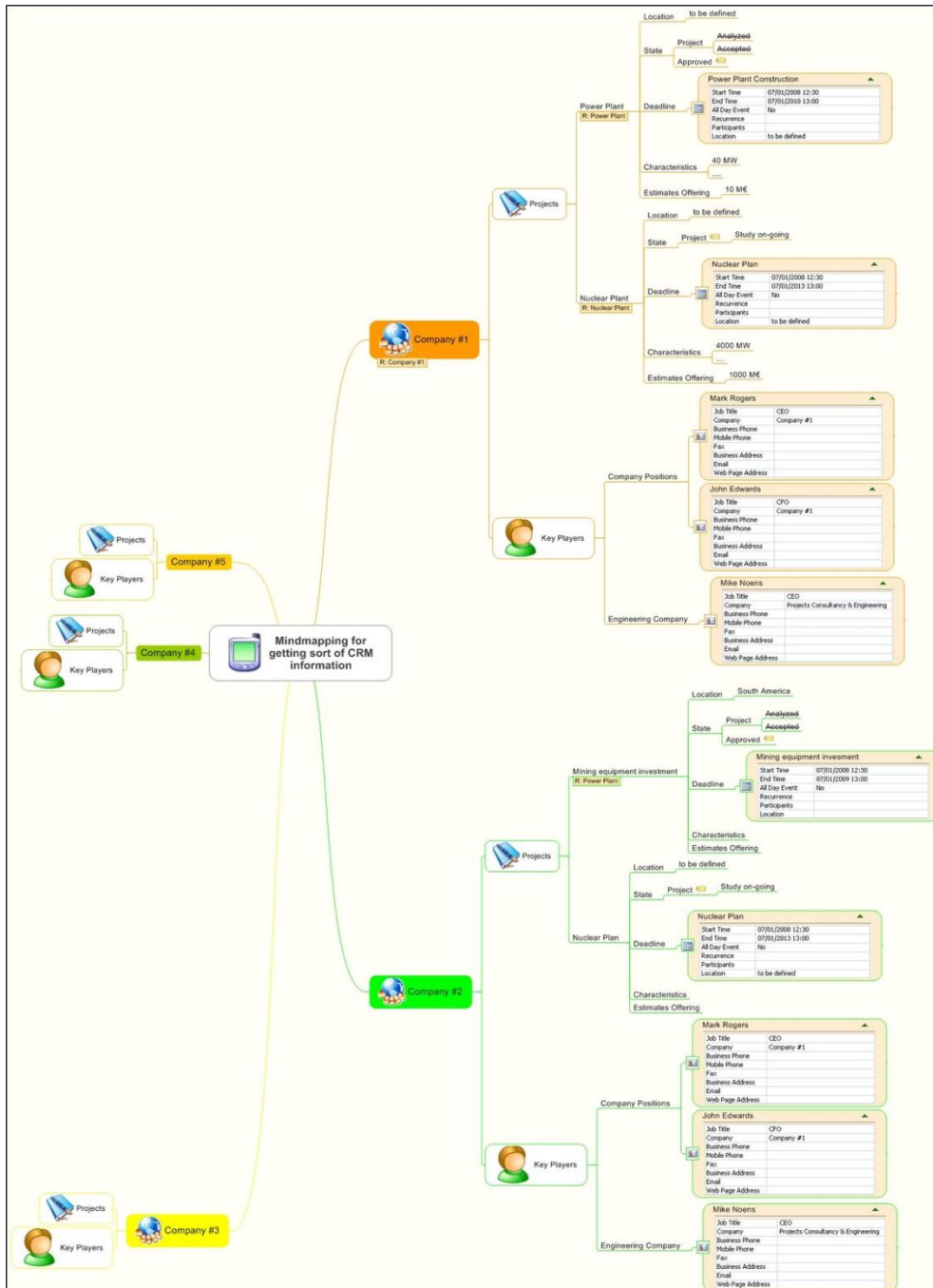


Sharing your CRM map: If you manage or work in a small team in your job, you can turn this into a collaborative map by placing it in a network folder where everyone can access it. You can add resources to each customer, so you can see at a glance who is responsible for what. Similarly, you can create your own tasks or assign them to others. This way, everyone on your team has a shared understanding of what needs to be done and by whom.

Customer sub-maps: If your key customers tend to be large, complex companies, you may want to create links to sub-maps that contain a wealth of detail about each one.

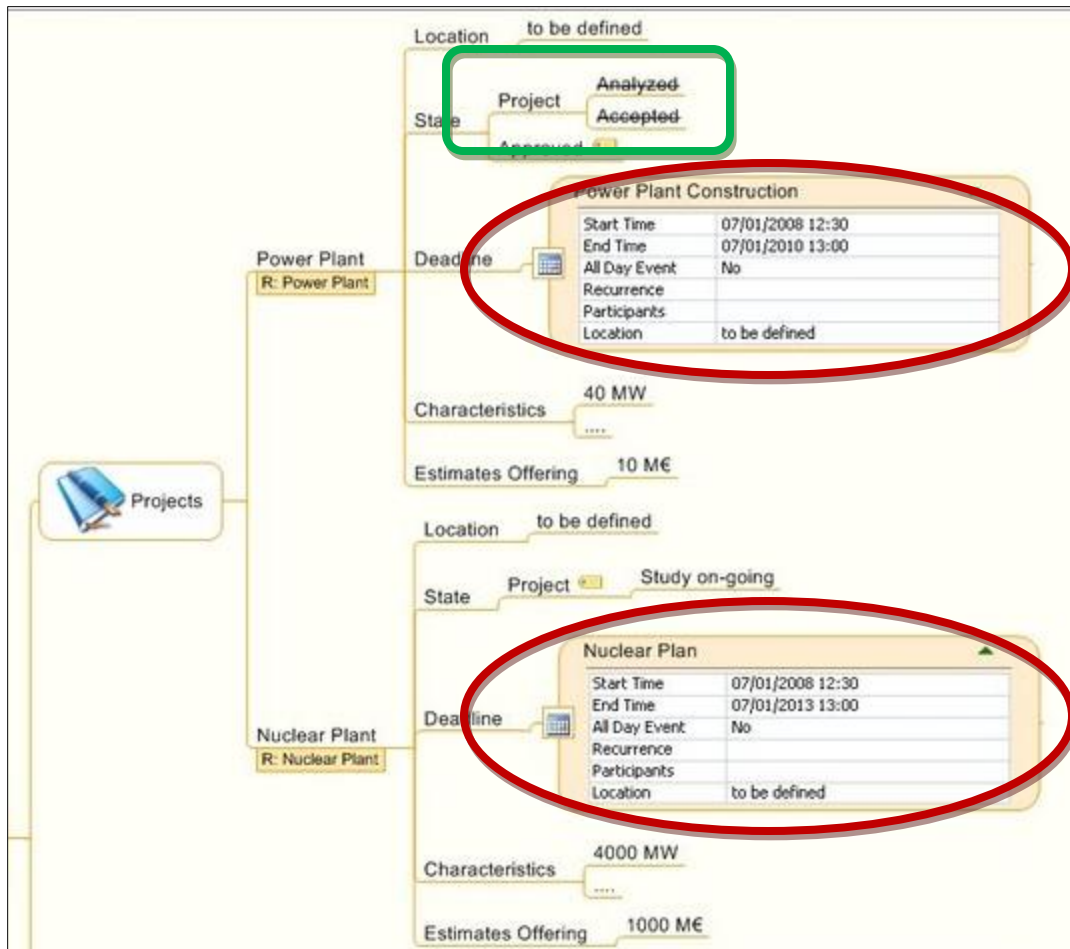
Another example of what's possible

I found the CRM mind map below on Andrew Martinez's Mindmapping Everywhere Blog. It is similar to what I just described in the heading titled "customer sub-maps." It does an excellent job of capturing all of the projects and people at a small group of companies. It is clear, well organized and communicates a wealth of information in a very compact format.



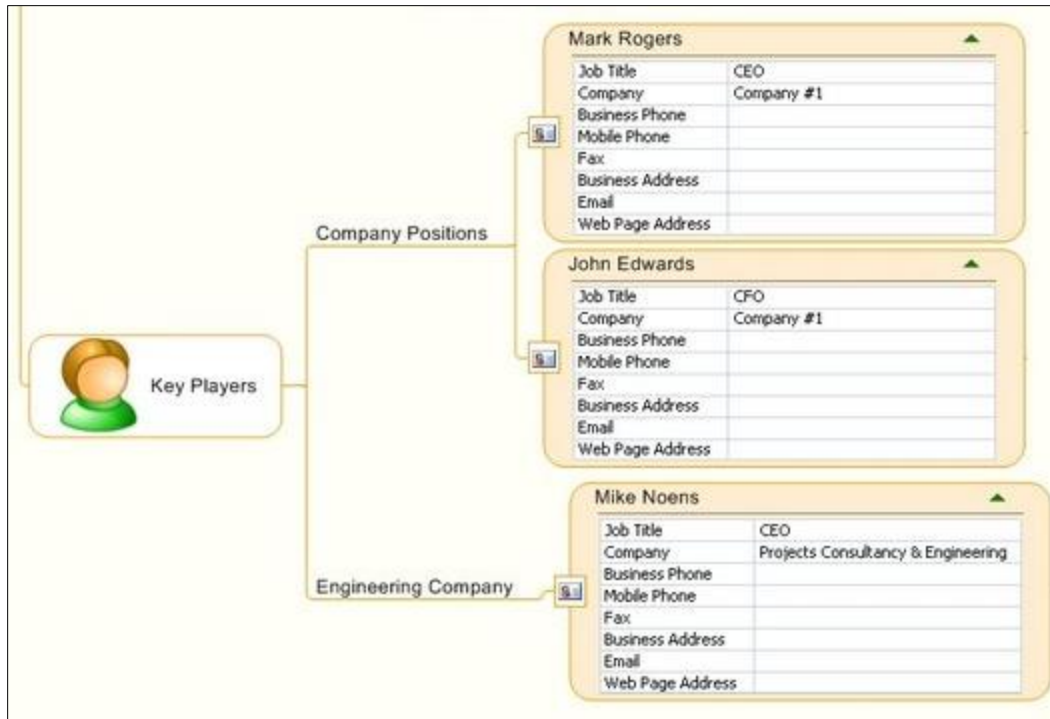
Here are links [to the mind map](#) and [a close-up of it](#).

Let's look a bit more closely at some of the elements of this mind map:



This close-up shows one way in which you can capture a customer's project information in mind map form. Note the two items circled in red. These appear to be meetings pulled in from Microsoft Outlook. I also think it's very clever how he used crossed-out text near the top of this mind map section (circled in green) to visually indicate that two project stages ("analyzed" and "accepted") have been completed.

Note also the names of some of the other topics: characteristics, estimates offering and location, for example. The lesson here is that you can add whatever project information you need to track to projects in your mind map.



Here's how this mind map treats the key contacts at one company. These contacts appear to be imported from Microsoft Outlook. If your mind mapping program doesn't support this functionality, you could add this type of detail to your mind map in a text note, a set of sub-topics or an inserted spreadsheet cell range.

Here's tip for you: One way to add a lot of utility to the contacts section of your mind map is to create clickable links to each person's e-mail address. That way, all you have to do is click on their e-mail address, and a new message form will automatically open, with their e-mail address already inserted into the "TO:" field. How do you do this? When the hyperlink dialog box opens, add this prefix to the person's e-mail address:

mailto:

That's all you have to do. This can be a big time saver, because it eliminates several steps. Compare this to the way you normally do it: You first have to switch to your e-mail program. Then you need to click on a toolbar icon to create new message. Then you need to click on the "TO:" field to open your e-mail program's address book, and select them from your list of contacts. That all gets replaced by a single click in your mind map!

Conclusion

As you can see from my CRM mind map – which is still in its early stages of development – and Andrew’s example, there is a lot you can do with this type of mind map. I’m excited about my CRM map, because I’m a bit ADD. And with the number of messages that hit my inbox each day, it’s frighteningly easy for important messages from current and prospective advertisers (my “customers”) to get lost in the sea of other messages. Now I can extract the key elements of my conversations with them into a simple mind map that enables me to see, at a glance, what has happened so far, whose move it is next and what needs to happen to bring each discussion to a successful conclusion.

Questions?

Please contact Chuck Frey at chuck@innovationtools.com.

Please [visit the Mind Mapping Software Blog](#) for all of the latest news, trends and resources related to visual mapping.

You can also [follow Chuck Frey on Twitter](#) for even more insights and ideas.