CourseMints

GUIDE

Personal SaaS CRM in Notion

Complete System

SELF-PACED PDF COURSE

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Complete System

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How to Use This Guide

Most freelancers and small businesses do not lose work because their offer is weak. They lose it in the gaps: the proposal nobody followed up, the past client who would have hired them again if asked, the warm introduction that went cold while they were busy. A CRM (customer relationship management system) closes those gaps. This guide builds a personal one in Notion: contacts, companies, a deal pipeline, an interaction log and a follow-up system, connected so that every morning one view tells you exactly who to contact.

The import pack gives you the structure and realistic sample data. The guide walks you click by click through what the importer cannot create (relations, rollups, formulas, views, buttons, templates and a lead form) and then through the routines, follow-up habits and emails that make a CRM pay for the time it takes.

What is in your download

File	What it is
This guide (PDF)	Setup, step by step, then the pipeline, follow-up system and routines
`notion-crm` folder	The Notion import pack: 5 Markdown pages, 5 CSV databases with sample rows, and `IMPORT-STEPS.md`

The databases are Companies, Contacts, Deals, Interactions and Follow-ups. The pages are CRM Home (with markers that show where each view and button goes), Pipeline Stages and Email Templates (reference pages you keep), and two template pages whose content becomes your Contact and Deal templates. `IMPORT-STEPS.md` repeats the setup in short form, with every formula in plain text for copying.

What “automates” means here

This CRM uses only what Notion does natively at the time of writing. On every plan: buttons that close or snooze a follow-up in one click, templates that pre-fill new contacts and deals, date reminders, and a form that drops new inquiries straight into your contacts. On paid plans: database automations that react to changes, such as creating a follow-up when a deal reaches the proposal stage. Notion does not read your inbox, track email opens or send sequences on its own. Chapter 1 sets out exactly what that means for you.

What you need

- **A Notion account.** The free plan runs the whole core system for one person at the time of writing. Database automations need a paid plan; the guide marks them clearly.
- **A computer for setup.** At the time of writing, Notion’s importer works on desktop and web, not in the mobile apps.
- **About two hours** for setup, in two sittings, plus about ten minutes a day once it runs.

The path through this guide

Chapter	What you do	Time
1	Decide what your CRM must do, and what it will not	15 min
2	Import the pages and databases	20 min
3	Create relations, rollups and formulas, link the samples	35 min
4	Define your pipeline stages and build the views	30 min
5	Add buttons, templates, reminders and a lead form	30 min
6	Move in your real contacts and learn the routines	45 min, then daily
7	Write follow-ups that get replies	20 min
8	Privacy, maintenance and fixes	as needed

CHAPTER 1

01

What a Personal CRM Does, and What Notion Cannot

Before building, be clear about the job. A personal CRM is not a sales department in a box. It is a memory you can trust, organized so that nothing promised slips and every relationship gets attention at the right time.

The four jobs

1. **Remember people.** Who they are, how you met, what they care about, what you discussed last time.
2. **Never drop a follow-up.** Every promise (“I will send you an example”) and every open conversation has a next step with a date.
3. **See the pipeline.** Which possible projects are where, what they are worth, and which have stalled.
4. **Learn where good work comes from.** Over months, the data shows which sources bring clients who say yes.

THE SCIENCE

Why “I will remember” fails

Remembering to do something in the future (psychologists call it prospective memory) is fragile, especially when you are busy and the cue to act never arrives. Research on **cognitive offloading**, reviewed by Evan Risko and Sam Gilbert in 2016, describes how people routinely use external tools such as notes and reminders to reduce the demands on memory, and how doing so generally improves performance when those demands are high. A dated follow-up in a system you check daily is a deliberate offload: the system remembers, so you do not have to.

The five databases

Database	One row is	Example
Companies	An organization	Brightwater Dental
Contacts	A person	Dana Whitfield, practice manager
Deals	A possible paid project	Brightwater second location pages, 3,200
Interactions	A call, meeting, email or message worth remembering	Scope call with Dana
Follow-ups	A dated next touch	Send Dana the revised quote

The connections: a contact belongs to a company; a deal involves one or more contacts; interactions and follow-ups attach to a contact and, when relevant, to a deal.

The one rule

Every lead and every client always has one open follow-up with a date. Everything else in this system supports that rule. Chapter 3 adds a formula that flags anyone who breaks it, and Chapter 4 puts those people on your Today view.

What Notion can and cannot do (at the time of writing)

Notion can, natively	Notion cannot, natively
Show today's and overdue follow-ups automatically	Read your inbox or log emails by itself
Remind you on a date (the Remind option on a date)	Track whether an email was opened
Close or snooze a follow-up in one click (buttons)	Send multi-step email sequences on a schedule
Pre-fill new contacts and deals (templates)	Run database automations on the free plan, apart from Slack notifications

Notion can, natively	Notion cannot, natively
Collect inquiries through a form	Enrich contacts with data from the web automatically
On paid plans: react to changes, and send email through a connected Gmail account	Replace a full sales platform for a large sales team

For a solo professional or a small team handling dozens of active relationships, the left column is usually enough, and it replaces a paid CRM subscription. If you have several salespeople, hundreds of new leads a month or rely on email tracking, a dedicated CRM is the better tool, and this system is a good way to learn what you need from one.

EXAMPLE

Riley's gap

Before the CRM, Riley tracked leads in email flags and memory. Last spring a bakery owner asked for a proposal; Riley sent it, got busy, and only remembered to follow up three weeks later, by which time the bakery had hired someone else. Now the proposal follow-up is created the day the proposal goes out, dated four days later, and it appears on the Today view whether or not Riley remembers.

EXERCISE

Your relationship inventory

1. Where do your contacts and leads live today (email, phone, spreadsheets, notebooks)?

2. How many possible projects are open right now, roughly, and what are they worth together?