



CRM: Beyond the Phone Book

The 4 Levels of CRM & What They Mean for Your Business Value

Your buyer isn't buying your contact list — they're buying your systems, your predictability, and proof the business runs without you.



Most owners hear "CRM" and picture a contact list with a search bar — a glorified phone book. But a CRM isn't an expense you tolerate; it's one of the highest-ROI investments you can make in your exit strategy. Here's the maturity ladder, and how each rung lifts what a buyer will pay for your business.

— **Tim Coleman, Founder, Coleman Collaborations Consulting Group**

THE CRM MATURITY LADDER

How each level impacts your exit value

1 Level 1 • Digital Phone Book Exit value impact: Zero Names, numbers, and a note on the last job. No pipeline and no follow-up — a buyer sees a one-man show with a phone book.	2 Level 2 • Sales Tracker Exit value impact: Low-to-Medium Leads move through stages. You know your close ratio and which sources perform — a repeatable sales motion buyers respect.
3 Level 3 • Operations Hub Exit value impact: High CRM drives scheduling, projects, and invoicing. Closed deals trigger workflows automatically — the owner is no longer the bottleneck.	4 Level 4 • Business Brain Exit value impact: Premium Integrated with financials, KPI dashboards, and predictive analytics. A turnkey, data-driven asset that de-risks the sale.
5 Match Tool to Maturity \$0 to \$500+/month The right CRM fits where you are today but scales to Level 4 — from Zoho and HubSpot to Closet CRM, MarketSharp, and Improveit 360.	6 It's How You Use It Systems over software A \$29 CRM run at Level 3 beats a \$500 CRM run at Level 1. The value isn't the tool — it's the systems and data it enables.

THE PAYOFF • CLIMB THE LADDER, LIFT YOUR MULTIPLE

• Levels 1-2 → .25-1x EBITDA	• Level 3 → 1-3x EBITDA	• Level 4 → 4x+ EBITDA
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OPTION 1 • \$250

CRM Audit Class

A one-hour working session mapping your business against the CRM maturity ladder — see which level you're on and what it's costing you at exit.

OPTION 2 • \$750

CRM Roadmap Series

Three one-hour classes to pick the right CRM, build your pipeline and workflows, and climb toward Level 4 before you sell.



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Ready to turn your CRM into an asset?

Start with the CRM Audit Class, or commit to the CRM Roadmap Series. Book your session at colemancollaborations.com.