

Set Up Your CRM Once, Properly

A step-by-step guide to HubSpot or Pipedrive for a small sales team.

Most small businesses set up a CRM twice. The first attempt is abandoned within six months because nobody decided what it was for, the fields were invented on the fly, and the import was rushed. This guide is the order of operations that prevents that.

Covers	HubSpot and Pipedrive · 69 setup tasks across eight phases
Includes	Field setup reference · Naming conventions · 30-day action plan · Health check
Format	This guide + a working Excel tracker (also opens in Google Sheets)
Built for	South African small businesses setting up a CRM for the first time
Time needed	Roughly 27 hours of work, best spread over two to three weeks
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SECTION 1

HubSpot or Pipedrive?

Both are good. For a team under ten people the choice comes down to two questions, and you can answer them in ten minutes.

	HubSpot	Pipedrive
Best at	Joining marketing and sales together — forms, email marketing, website tracking and deals in one place.	Being a fast, uncluttered deal pipeline that reps will actually use without being nagged.
Free tier	Genuinely usable free CRM for contacts and deals. Costs rise sharply once you need automation and reporting depth.	No free tier, but the entry plan is inexpensive and includes what a small team needs.
Learning curve	Steeper. Lots of surface area, much of which you will never use at this size.	Shallow. Most people are productive within an hour.
Customisation	Extensive. Multiple objects, deep property configuration, powerful workflows.	Adequate for most small businesses, and deliberately constrained — which is often a feature.
Where it hurts	The free tier's limits appear exactly when you start relying on it, and the next tier is a real jump in cost.	Marketing functionality is thin. If you need email campaigns you will bolt on a second tool.
Choose it if	You do inbound marketing, run a website that generates enquiries, or want one system for marketing and sales.	You sell mainly outbound or by referral, and want a tool your reps stop noticing.

The two questions that decide it

1. **Does your website generate enquiries you want to nurture automatically?** If yes, lean HubSpot — having forms, tracking and deals in one system removes an entire integration problem. If your leads come from referrals, calls and networking, that advantage disappears.
2. **Will your reps resist software?** If the honest answer is yes, lean Pipedrive. Adoption beats capability every time. The most powerful CRM in the world produces nothing if the team quietly stops updating it.

Do not spend two weeks choosing

The cost of picking the less-ideal system is small. The cost of a two-week evaluation, followed by a rushed setup because you have run out of patience, is enormous. Both tools export cleanly, so switching later is unpleasant but not catastrophic. Pick one this week and spend your energy on Phase 0 instead.

What this guide assumes

- Two to ten people will use the system, of whom one to six sell.
- You are selling to other businesses, with a sales cycle measured in weeks rather than minutes.
- You currently track deals in a spreadsheet, an old CRM, or your head.
- Nobody on the team is a systems administrator, and nobody wants to become one.

SECTION 2

Phase 0: decide before you log in

Five decisions, made on paper, before anyone touches a settings menu. Skipping this is the single biggest reason CRM rollouts have to be redone.

Decision 1 — Who owns this?

One named person, with the authority to say no during setup. Not a committee. The owner does not have to do all the work, but every decision routes through them. Shared ownership reliably produces a half-configured system that nobody feels responsible for.

Decision 2 — What is the CRM actually for?

Pick *one* primary job. Forecasting, follow-up discipline, or customer history. All three are legitimate; building for all three simultaneously produces a system that does none of them well, because they pull the configuration in different directions. Forecasting wants strict stages and required close dates. Follow-up discipline wants activity tracking and reminders. Customer history wants rich records and long retention. Choose the one that hurts most today.

Decision 3 — What are your stages, and what advances a deal?

Write them on paper. Six selling stages plus won and lost. For each one, write the single condition that must be true before a deal is allowed to move forward. Section 3 covers this in full — but the decision belongs here, before the software offers you its opinion.

Decision 4 — What must you be able to report on?

List the four or five questions you want the CRM to answer every month. Then work backwards to the fields each answer requires. This is the correct direction. Building fields first and hoping useful reports emerge is how businesses end up with sixty fields and no insight.

A good starting list of questions

What will we close this month, weighted? · Which deals have gone quiet? · Which lead sources produce revenue, not just enquiries? · Why do we lose? · How much selling activity is each person doing?

Five questions. Between them they require about eleven fields — which is the entire point.

Decision 5 — What is your smallest workable version?

Every field, pipeline, automation and dashboard you create now is something to maintain forever. Adding later is easy; removing is politically and practically hard, because somebody will insist they use it. Start deliberately smaller than feels right.

Also settle these before you start

- **Currency and date format.** Set ZAR and day-month-year on day one. Changing currency after data is loaded creates permanent oddities in historical reporting.
- **Who may edit settings.** Two admins maximum. More than that and your configuration drifts within weeks, usually without anyone noticing.

- **Your POPIA position.** You are about to centralise personal information about real people. Section 7 covers what that requires.

SECTION 3

Pipeline and stages

This is the one configuration decision that is genuinely expensive to change later. Spend the time here.

Name stages after buyer evidence, not seller activity

A stage called *Following up* can be reached by sending an email. A stage called *Proposal Sent* requires the buyer to have received something. Activity-named stages let deals advance without the buyer doing anything, which inflates your forecast and hides deals that are actually dead.

Stage	Exit criterion — all must be true to advance	Probability	Target days
New Lead	Contact details captured, source recorded, owner assigned.	5%	2
Contacted	Two-way contact made — they replied, answered, or met you.	10%	5
Qualified	Need confirmed in their words, rough budget known, speaking to someone with influence.	25%	7
Discovery	Requirements documented, decision-maker identified, timeline stated by them.	40%	10
Proposal Sent	Proposal delivered and a walkthrough conversation booked or completed.	60%	7
Negotiation	Verbal commitment given; only commercial terms remain open.	80%	7
Closed Won	Signed order, purchase order, or paid deposit received.	100%	—
Closed Lost	Loss reason recorded and the contact moved to a re-engagement list.	0%	—

Put the exit criterion in the stage description field

Both HubSpot and Pipedrive let you add a description to each stage. Paste the exit criterion there. Reps read help text at exactly the moment they are unsure whether to move a deal — which is the only moment the rule matters. A criterion that lives in a document nobody opens is not a criterion.

Set required fields at the stage level

Both tools can force a field to be filled in before a deal enters a stage. Use this sparingly and deliberately: require an expected close date at Proposal Sent, and a loss reason at Closed Lost. That is usually enough. Two well-chosen stage requirements do more for data quality than twenty required fields on the create form, which people simply learn to fill with rubbish.

Do you need a second pipeline?

Almost certainly not. Add a second pipeline only when the *stages themselves* genuinely differ — for example, a project business that also sells a monthly retainer through a completely different process. A different product sold through the same steps is a field, not a pipeline. Every extra pipeline splits your reporting and doubles the

maintenance.

Set the stale deal threshold

Both tools can flag deals with no recent activity — HubSpot through deal properties and views, Pipedrive through its rotting deals setting. Ten working days suits most considered purchases. Under five and you will drown in flags; over fifteen and the alert stops catching anything before it is too late.

SECTION 4

Fields and data structure

Thirty-three fields across contacts, companies and deals. Eleven are required. Everything else is optional, and that is deliberate.

The Field Setup tab in the accompanying workbook lists every field with its type, its dropdown values and whether it should be required. Build them exactly as written, tick them off as you go, and resist the urge to improvise. Fields invented mid-build are the ones that never get reported on and never get filled in consistently.

Four rules for fields

1. **Dropdowns beat free text, always.** Free text cannot be reported on. "Referral", "referral" and "word of mouth" become three different lead sources, and your source report becomes decoration.
2. **Required means genuinely required.** Mark a field required only if the record is useless without it. Over-requiring produces junk data, because people will type anything to get past the form.
3. **Keep the same option list on related fields.** Lead source on the contact and lead source on the deal must use identical options, or you will never reconcile enquiries against revenue.
4. **Order the record layout by frequency of use.** Reps fill in what they can see without scrolling. Put the fields you actually report on at the top of the form.

The eleven required fields

Object	Required fields	Why these and not others
Contact	First name · Last name · Email · Contact owner · Lead source · Lifecycle stage · POPIA consent basis	Names and email make the record usable and de-duplicable. Owner makes it visible. Source and lifecycle make it reportable. Consent basis makes it lawful.
Company	Company name · Relationship type · Company owner	Relationship type is the one that stops someone cold-pitching an existing customer or a competitor.
Deal	Deal name · Deal value · Stage · Expected close date · Deal owner · Lead source · Product line · Next action · Next action date	These nine are what the forecast and the follow-up discipline are built from. Nothing here is optional if you want either to work.

Two fields most South African businesses forget

VAT number on the company record — you will need it at invoicing, and capturing it during the deal avoids a scramble at close. **Province** as a dropdown rather than free text — it drives territory assignment, travel planning and regional reporting, and free-text provinces are unusable within a month.

Hide what you will not use

Out of the box you get dozens of fields designed for businesses much larger than yours. Hide every one you will not use, on day one. Every visible unused field teaches your team that the form is mostly noise — and once they believe that, they stop reading it and start skipping the fields that matter too.

SECTION 5

Naming conventions

Boring, unglamorous, and the difference between a CRM you can search in year two and one you cannot.

The full table lives on the Naming Conventions tab of the workbook. The principle behind all of it is simple: put the thing that *groups* records first, and the thing that *distinguishes* them second, so that an alphabetical list is also a useful list.

What	Rule	Good	Bad
Deal	Company — Service — Month Year	Kruger Logistics — Fleet Tracking — Aug 2026	New deal / Opportunity 3
Company	Trading name, no legal suffix	Kruger Logistics	Kruger Logistics (Pty) Ltd / KL
Contact	Separate name fields, sentence case	Anele Mbeki	ANELE MBEKI / Mr A Mbeki
Pipeline	What is sold, not who sells it	New Business — Services	Thandi's pipeline
Custom field	Plain English, no abbreviations	Preferred contact channel	Pref_Comm_Ch / Type B
Saved view	Owner, then what it shows	Thandi — Closing this month	My deals / Untitled view
Template	Sequence, step number, purpose	Outbound 03 — Proof email	Follow up final FINAL
Automation	Trigger, then action	New web lead — assign and notify	Workflow 1 / Do not delete

The company name suffix problem

"Kruger Logistics", "Kruger Logistics (Pty) Ltd" and "Kruger Logistics Pty" are three records as far as any CRM is concerned. Suffix variation is the single largest source of duplicate companies in South African CRMs. Decide now that you store the trading name without a legal suffix, put the full legal name in a separate field if invoicing needs it, and apply the rule to every record including the imported ones.

SECTION 6

Importing without wrecking it

Every import mistake is multiplied by your row count. Two extra hours of preparation saves weeks of cleaning.

The order that matters

Companies first, then contacts, then deals. Import contacts first and the CRM creates a company record for each one from whatever text is in the company column — producing a second, messier set of companies that you then have to merge by hand.

The four mistakes that cost the most

Mistake	What it costs	The fix, which takes minutes
One combined name column	Every automated email you ever send reads "Dear Mr John Smith".	Split into first and last name columns in the spreadsheet. Move titles to their own column or delete them.
Inconsistent phone formats	Click-to-call, SMS and WhatsApp links fail silently on a large share of your records.	Convert everything to +27 82 555 1234 format. Strip leading zeros, spaces and brackets first.
Free-text values that do not match your dropdowns	Unmatched values import as blank. You lose the data entirely, without a warning.	Map every existing value to one of your new dropdown options before importing.
No owner column	Unowned records are invisible in every list and every report. They are never followed up.	Add an owner column and fill every row. Decide who owns the leftovers rather than leaving them blank.

Import ten rows first. Always.

Import ten records, then open all ten in the CRM and compare every field against the source spreadsheet, cell by cell. It takes fifteen minutes. It is the only reliable way to catch a silently unmapped column before it blanks that field across four thousand records — which you would otherwise discover in month two, with no way back.

Keep the original untouched

Before you edit anything, save an unmodified copy of every source file somewhere outside the CRM. If the import goes wrong — and sometimes it does — this is your only route back. It costs nothing and it has saved more rollouts than any other single habit.

SECTION 7

POPIA and your contact data

You are about to centralise personal information about real people. Here is what that generally requires of a small South African business.

Not legal advice

This section describes commonly accepted good practice under the Protection of Personal Information Act. It is general information, not legal advice, and it does not cover every situation — direct marketing, special personal information and children's data all carry additional requirements. If you process personal information at scale or in a regulated sector, have a qualified attorney review your position.

What POPIA broadly expects

Principle	What it means for your CRM
A lawful basis for processing	You need a reason you are allowed to hold someone's information — consent, a contract, a legal obligation, or a legitimate interest. Record which one applies, per record.
Purpose limitation	Collect information for a stated purpose and use it for that purpose. A CRM built for selling is not automatically a mailing list.
Minimality	Do not collect fields you do not need. This aligns neatly with the advice in Section 4 for entirely separate reasons.
Accuracy	Keep records current and correct them when asked. Duplicate and stale records are a compliance issue as well as a sales one.
Retention limits	Do not keep personal information indefinitely without a reason. Decide a retention period and diarise a review.
Security safeguards	Reasonable technical and organisational measures. Two-factor authentication, restricted permissions and controlled exports are the practical minimum.
Data subject rights	People may ask what you hold, ask you to correct it, and object to processing. You need to be able to find and act on their record quickly.

What to do in the CRM

1. **Add the two consent fields** from the Field Setup tab: lawful basis, and the date consent was captured. Fill them honestly on import, including "Not established" where that is the truth.
2. **Restrict who can export.** Bulk export is where most data leaks originate. In a small team, only the two admins should have it.
3. **Turn on two-factor authentication for every user.** Your CRM holds every customer contact detail you have. Treat it like banking.
4. **Honour opt-outs at record level.** Use the marketing opt-out field, and make sure no automation can override it.
5. **Write down your retention period** and diarise an annual review. Even a short, honest policy is far better than none.

6. **Know who your Information Officer is.** For most small businesses this is the owner or managing director by default, and the role carries specific registration and reporting obligations worth confirming.

SECTION 8

Automation and reporting

Three automations and four reports. There is a strong argument for stopping there in the first month.

The only three automations you need at first

Automation	Trigger	Action	Why it earns its place
Lead assignment	New lead created	Assign to an owner and notify them	Unassigned leads sitting for a day are usually lost. This one automation probably pays for the CRM.
Proposal follow-up	Deal enters Proposal Sent	Create a task to call in two days	Books the follow-up call that sellers most reliably forget to book.
Stale deal reminder	No activity for ten days	Notify the deal owner only	The safety net. Notify the owner, never the whole team — public shaming kills adoption.

Why to stop at three

Automation built before you understand your own process automates the wrong thing, at scale, silently. Every rule you add is also a rule someone must debug at six on a Friday. Run the CRM for a month with three automations, notice which manual step everyone actually resents, and automate that fourth thing deliberately.

The four reports worth building

Report	What it shows	The decision it drives
Pipeline dashboard	Weighted forecast, deals by stage, stalled deals	What to commit to this month, and which deals to work today.
Activity report	Calls, meetings and emails per person per week	Whether the problem is effort or effectiveness. Coach with it; do not police with it.
Lead source report	Deals and revenue by source, not just enquiry volume	Where to spend marketing money. The answer is usually a surprise.
Loss reason report	Why deals were lost, grouped	Pricing, product and positioning. The cheapest market research available to you.

Set the pipeline dashboard as everyone's default home screen, and schedule a weekly email of it to the owner. What people see on login is what they act on, and a dashboard nobody opens changes nothing.

SECTION 9

Go live and the first 30 days

Configuration is the easy half. Adoption is where rollouts actually fail, and it fails quietly.

Go-live week

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|--------------------------|---|
| ☐ | Run a 60-minute training session. Teach the daily workflow only — log a call, move a stage, set a next action. Nobody needs to know what the CRM can do, only what they must do. |
| ☐ | Hand out a one-page rule sheet. Five non-negotiables, printed, on the wall. Longer documents are not read. |
| ☐ | Switch the old system to read-only. Two systems means no system. A soft cutover always becomes a permanent split. |
| ☐ | Sit with each rep while they log one real deal. Twenty minutes each. Catches misunderstandings before they harden into habits. |
| ☐ | Run the first weekly pipeline review off the CRM. Not off a spreadsheet. The moment you review from anywhere else, the CRM becomes optional. |

The five non-negotiables

1. Every deal lives in the CRM. If it is not in the CRM, it does not exist.
2. Every deal has an owner.
3. Every open deal has a next action with a date on it.
4. Stage changes follow the exit criteria, not how the deal feels.
5. Last contact is updated the same day you speak to someone.

The week-two conversation that saves the rollout

In week two, ask each person individually what is annoying them about the CRM. The friction they name then is precisely what will kill adoption by month three. Fix the top two complaints immediately and visibly, and tell the team you did. Nothing builds buy-in faster than a complaint that was actually acted on.

Weeks two to four

The 30-Day Plan tab in the workbook sets out the full schedule with dates that calculate from your go-live day. The shape of it: week two is data quality and friction removal, week three is the first automation and showing the team their own dashboard, week four is the remaining automations and the 30-day health check. Four consecutive weekly pipeline reviews is the point at which the habit holds on its own.

SECTION 10

Health check and troubleshooting

Run the twelve-point check at day 30, day 90, and every quarter after that. Score it honestly.

The Health Check tab scores each item 0, 1 or 2 — not happening, happening inconsistently, happening reliably — for a total out of 24. A flattering score fixes nothing; the whole point is to find problems while they are still cheap.

Score	Verdict	What to do next
20–24	Healthy	Keep the weekly rhythm. Now you can safely add automation and reporting depth.
14–19	Workable, drifting	Pick the two lowest-scoring checks and fix only those. Add nothing new until they score 2.
8–13	At risk	Adoption is failing, not the software. Stop configuring, retrain, reinstate the weekly review.
0–7	Not in use	Usually the process was designed for a bigger company than yours. Cut the scope by half and restart from Phase 0.

Common failures and what actually causes them

Symptom	The usual cause	The fix
Reps stopped updating deals	The CRM takes from them and gives nothing back. They enter data; someone else gets the report.	Show them their own numbers weekly. Cut required fields to the minimum. Make email and calendar sync work so records fill themselves.
The forecast is always wrong	Stages are being changed on optimism rather than evidence, and close dates are aspirational.	Enforce exit criteria for a month. Require a close date at Proposal stage. Recalculate stage probabilities from your own closed deals.
Data is full of duplicates	Import was rushed, and there is no naming rule for company names.	Run the duplicate tool monthly. Apply the company naming rule to every record. Make email a required field on contacts.
Nobody looks at the dashboard	It is not the default screen and it is not attached to a meeting.	Set it as the home screen, schedule the weekly email, and open the weekly review with it every single time.
Half of everything says "Other"	The dropdown options do not match how the business actually works.	Ask the team what the missing options are. Fix the list rather than the people.
It is slower than the old spreadsheet	Too many required fields, or a form nobody has reordered.	Cut required fields to the eleven in Section 4. Reorder the record layout by what is used most.

BEFORE YOU START

If you only remember three things

1. **Decide before you configure.** Phase 0 on paper is worth more than any feature comparison.
2. **Build the smallest version that answers your five questions.** Everything else can be added when you can name the decision it improves.
3. **The weekly review is the product.** The CRM is just where the data for it lives. Skip the review for a month and the system decays regardless of how well it was configured.

This guide accompanies the CRM Setup Tracker workbook. Menu paths reflect HubSpot and Pipedrive layouts as at September 2026; both vendors move settings from time to time, so search the setting name in the product's own search bar if a path has changed. Section 7 is general information about POPIA and is not legal advice.