



II

The Memory.

NEVER LOSE A CONVERSATION AGAIN

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FIELD GUIDE

18 PAGES

FREE

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HOW TO USE THIS GUIDE

Read it through once. Then go to page 15 and copy the template into a tool you already use. The whole setup takes under thirty minutes. The first hundred records take you about a week.

I

*Why **memory** beats software.*

A "CRM" is not a magic system. It is a place where conversations live. The cheapest spreadsheet, used every day, beats the fanciest tool that nobody opens. The question is not "which CRM should I buy". The question is "what is the smallest thing I will actually keep up to date".

What you are trying to remember

For every person you talk to as a company (a lead, a customer, a partner, a vendor) you want to know five things at any moment:

1. Who they are.
2. How they found you.
3. Where they are in your process today.
4. The last time you talked, and what was said.
5. The next concrete thing you owe them.

If a system can answer those five questions in under ten seconds, it is good enough to start. You can always upgrade later.

The cost of forgetting

Customers do not get angry that you forgot them. They quietly disappear and tell their friends you "did not seem interested". The single biggest leak in a young company is not bad marketing. It is leads who said yes once, and were never followed up.

The customer you forget never comes back. They just stop replying.

What you do not need yet

- An enterprise CRM with a six-month implementation.
- Pipeline forecasting dashboards.
- Automation flows that send "personalised" emails to a thousand people.
- A sales operations hire.

You need five columns and discipline.

II

The five-column shape.

This shape works whether you have ten leads or ten thousand. The columns never change. What changes is the tool that holds them.

WHO	SOURCE	STAGE	LAST TOUCH	NEXT STEP
Name & contact, and one tag	Where they came from	Where they are in your process	The date, and a one-line summary	What you owe them, by when

Column by column

1. Who

Full name, email, phone if you have it, and one tag (industry, role, or city). One tag, not five. Tags only matter if you can sort by them later. More than one tag per person is usually noise.

2. Source

Where they came from. Six choices, no more: *referral, website, event, cold outreach, ads, partner*. If you cannot pick one, write "unknown" and move on. Knowing your dominant source is the most undervalued metric in a young company.

2.1 Why six options, not unlimited

If you let yourself add a new source every week, you will never be able to count them. Six is enough. If you really need a seventh later, add it then.

3. Stage

Where they are right now in your process. The simplest pipeline has four stages:

STAGE	DEFINITION
New	You have their contact details. You have not spoken yet.
Talking	You have had at least one real conversation.
Customer	They have paid you, even once.
Lost / Quiet	They said no, or they have been silent for 30+ days.

That is enough. Do not add seven sub-stages. You will not maintain them.

CHAPTER 02 (CONTINUED)

4. *Last touch*

The date of your last conversation, plus one line of plain English. Not a meeting recap. One sentence. "Sent quote, waiting on legal", "Not ready, asked us back in March", "Demo went well, kids interrupted, retry next week".

One line. If you cannot summarise the last conversation in one line, you do not yet know what happened.

5. *Next step*

One concrete action you owe them, plus a date. Not a goal. An action. "Send pricing PDF" not "follow up". "Reply to her email about the integration" not "stay in touch".

If a person in your memory has no next step, that means one of two things:

- They are a customer with nothing pending. Good. Mark stage = Customer, next step = blank, last touch updated.
- They are a lead you have abandoned. Bad. Either set a real next step, or move them to "Lost / Quiet".

The shape, full row

NAME	SOURCE	STAGE	LAST TOUCH	NEXT STEP
Maria Popescu	Referral	Talking	2026-04-12. Sent quote, waiting on her legal team.	2026-04-19. Reply to legal questions.
Jordan Tan	Website	New	2026-05-02. Filled form, downloaded handbook.	2026-05-09. Send intro email.
Anna Steele	Event	Lost	2026-03-01. Said budget gone for the year.	2026-09-01. Re-open conversation.

That is the entire system. Every row tells you who, where they came from, where they are, what just happened, and what you owe.

III

Pick the tool.

Three real options. Pick the one you will actually open every day. The "best" tool is the one that wins your morning.

Option A: a Google Sheet

Free. Five columns. Done in fifteen minutes. The right answer for the first 50 to 200 records.

- **Pros:** Free. Familiar. No setup. Anyone on your team can edit.
- **Cons:** No reminders for "next step" dates. No auto-link to email. No history of changes.

GOOGLE / FREE

HOW TO SHARE A GOOGLE SHEET

- [support.google.com / docs / share-files](https://support.google.com/docs/share-files)



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Option B: Notion

Free for individuals, cheap for small teams. A Notion database with the five columns gives you filtering, views, and a real "card" per person where you can paste call notes.

- **Pros:** Each person gets their own page for notes. Views by stage, by source, by next-step date.
- **Cons:** Slow on very large databases (thousands of rows). Not built for sales pipelines specifically.

NOTION / FREE

HOW TO BUILD A NOTION DATABASE

- [notion.so / help / intro-to-databases](https://notion.so/help/intro-to-databases)
- [notion.so / help / views-filters-and-sorts](https://notion.so/help/views-filters-and-sorts)



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Option C: HubSpot CRM, free tier

Free forever for the basic CRM. The right answer when you cross 200 contacts, or when more than two people in your team need to update records.

- **Pros:** Built for this exact job. Automatic email logging. Reminders. Reports.
- **Cons:** More choices than you need at first. Easy to over-customise on day one.

HUBSPOT / FREE

HUBSPOT CRM, GETTING STARTED

- [knowledge.hubspot.com / get-started](https://knowledge.hubspot.com/get-started)
- [academy.hubspot.com / hubspot-crm-software](https://academy.hubspot.com/hubspot-crm-software)
- [knowledge.hubspot.com / contacts / import](https://knowledge.hubspot.com/contacts/import)



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CHAPTER 03 (CONTINUED)

Decision rule, in plain English

WHERE YOU ARE	USE THIS
Solo founder. Less than 50 contacts.	Google Sheet. Today. Twenty minutes.
Two to four people. Want call notes per person.	Notion database with the five columns.
200+ contacts, two people updating, want reminders.	HubSpot free CRM.
Already paying for Salesforce.	Use it. Do not switch tools just because this guide exists.

The rule for switching tools

Switch tools only when the current one is causing real pain. "I forgot to follow up because the sheet has no reminders" is real pain. "It would be nice to have automation" is not real pain. Stay on the cheap tool until it visibly hurts.

HONEST WARNING

Switching CRMs is the most over-rated activity in young companies. It feels productive and is usually a waste of two weeks. The act of choosing a tool will not make you better at memory. The act of opening it every morning will.

IV

The daily ritual.

Ten minutes a day. Same time every day. Treat it like brushing your teeth. The first cup of coffee, the memory, then the inbox.

The morning ten-minute pass

1. **Open the memory.** The sheet, the Notion database, or the HubSpot pipeline. Whatever you chose.
2. **Filter by "Next step date is today or earlier".** If your tool cannot do that, sort by the date column.
3. **For each row that is overdue:** do the next step now if it takes under three minutes. If it takes more, schedule it on your calendar today and update the row to a new date.
4. **Yesterday's conversations.** For every call, demo, or substantive email from yesterday, update the "last touch" line and set a new "next step".

That is it. If you do this every day, the system never goes stale. If you skip three days in a row, the system is dying.

The "five-second rule"

If updating a row takes more than five seconds, your system is too complicated. Cut a column. Cut a tag. Cut a stage. The system has to be lighter than the work it tracks.

What to do when you talk to someone

Every real conversation (call, in-person meeting, demo, video call) gets a five-second record. Right after the call, before the next thing.

- Open the row.
- Update "last touch" with today's date and one line.
- Set "next step" with one verb and a date.
- Close the row. Move on.

Do this in the five minutes after the call, not at the end of the day. By the end of the day you will have forgotten three of the five things that mattered.

A TRICK THAT WORKS

Block five minutes after every customer-facing meeting on your calendar. Call it "memory". Use those five minutes to write the row. If you do not block the time, the time will not exist.

What to do at the end of the day

One scan. Two minutes. Look down the "next step" column. If anything is empty, fill it or move the row to "Lost / Quiet". A row with no next step is a row that has stopped being a relationship.

Email integration, only if it is automatic

If you use HubSpot's free CRM, install the Gmail or Outlook extension. It logs replies for you. If you are on a sheet, do not try to log emails by hand. You will lose. Just keep the date and the one-line summary.

HUBSPOT / FREE

EMAIL AND OUTLOOK INTEGRATIONS

- [knowledge.hubspot.com / sales-extension-for-gmail](https://knowledge.hubspot.com/sales-extension-for-gmail)
- [knowledge.hubspot.com / sales-add-in-for-outlook](https://knowledge.hubspot.com/sales-add-in-for-outlook)



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EXERCISE / 10 MINUTES TODAY

SET UP YOUR MORNING SLOT

Open your calendar. Put a 10-minute recurring block at the start of every weekday. Title: "Memory". Move your phone to do-not-disturb during that block. This is the most important calendar block you will ever set.

Calendar block date locked: _____

V *The weekly review.*

Once a week. Thirty minutes. Same day, same time. Friday afternoon is the right time for most founders. Monday is too late.

The five questions to ask

1. **Who is silent?** Anyone in "Talking" stage with no contact in 14+ days. Decide: re-open or move to "Lost / Quiet".
2. **Who is overdue?** Any "Next step" date older than today. Either do it now or pick a new date you will actually keep.
3. **Where did this week's leads come from?** Count the new rows by source. Three from referrals, one from website, zero from ads. That is data.
4. **Where did money come from?** Of the customers who paid this month, what was their original source?
5. **What is the longest-lived row?** The oldest "Talking" row. Three months old? Six? It is probably dead. Decide.

Write the answers down

Keep a single document or page called "Weekly memory review". Add the five answers each Friday. Five lines, dated. After ten weeks, you will see your real growth pattern.

What changes after three months

If you have done the daily ritual and the weekly review for twelve straight weeks, three things will be true:

- You can name your top source of paying customers from memory.
- You will have re-opened at least one conversation that would have stayed silent.
- You will need fewer "what's the status of X?" meetings, because the answer is in the row.

VI

*Tagging without losing your **mind**.*

Tags are the temptation that ruins memory systems. The first day, you have ten tags. By month two, you have eighty, and you cannot find anyone. Discipline.

The two-tag rule

Pick exactly two tag categories. Two. Not three.

- **Category A: industry or role.** Pick whichever defines your customer best. "Bookkeeping firm", "freelance designer", "small clinic". Keep the list under ten options.
- **Category B: deal size or priority.** Three options total. "Big", "medium", "small". Or "high", "medium", "low".

Two columns. Each with a small fixed list. That is all.

What not to tag

- **Personality.** Notes about how nice they are belong in the "last touch" line, not a tag.
- **Every product they showed interest in.** Pick one primary interest, or none.
- **Every event you met them at.** The event is the source, not a tag.

Why tag discipline matters

The whole point of tags is to filter. "Show me all big bookkeeping firms in Talking stage." If your tags are messy, that filter returns garbage. If they are tight, it returns a usable list you can act on.

A SIX-MONTH RULE

If a tag has been used fewer than five times in the last six months, delete it. Tags decay like food. Old tags poison the system.

HubSpot specific: properties, lists, segments

If you are on HubSpot, the equivalent of "tags" is contact properties (the columns) and lists (the saved filters). Lists are where the daily ritual lives. Build three saved lists:

1. "My next steps today" (Next step date is today or earlier, and stage is not Lost).
2. "Going quiet" (Stage = Talking, Last touch older than 14 days).
3. "This week's new" (Created in last 7 days).

HUBSPOT / FREE

HOW LISTS WORK IN HUBSPOT

- [knowledge.hubspot.com / lists / create](https://knowledge.hubspot.com/lists/create)



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VII

When to upgrade.

A real CRM is right when the cheap one starts to lose data, drop reminders, or block your team. Not before. The signs are specific.

Five honest signals

1. **Two or more people are editing rows at the same time** and overwriting each other.
2. **You missed a paying customer's renewal** because nobody had a reminder.
3. **You cannot answer "where do paying customers come from"** in under thirty seconds.
4. **The sheet is over five hundred rows** and the "next step" column has lost meaning.
5. **A salesperson asks for "pipeline reports"** and you actually need them, not just want them.

Until at least two of these are true, stay on the cheap tool.

Where to migrate, if you must

- **HubSpot CRM (free tier).** The right next step for almost every small company. Free forever for the core CRM. Easy import from a spreadsheet.
- **Pipedrive.** A simpler paid alternative. Cleaner pipeline view. Less marketing power than HubSpot.
- **Salesforce.** Only if a paying customer or investor is forcing you to use it. It is overkill for almost everyone reading this guide.

HUBSPOT / OFFICIAL IMPORT GUIDE

IMPORT A SPREADSHEET OF CONTACTS INTO HUBSPOT

- [knowledge.hubspot.com / contacts / import-contacts](https://knowledge.hubspot.com/contacts/import-contacts)
- [knowledge.hubspot.com / format-files-for-importing](https://knowledge.hubspot.com/format-files-for-importing)



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Migration rules

- **Do not migrate everything.** Migrate "Talking" and "Customer" stages. Archive the rest as a CSV.
- **Map the five columns first.** Name, source, stage, last touch, next step. Anything else is a bonus.
- **Keep the daily ritual unchanged.** The tool is new. The ritual is the same.

VIII

Starter template.

Copy this exactly. You can change it later. Today, just start.

Sheet header row

Eleven columns, left to right. Make these the headers of row 1.

#	COLUMN HEADER
1	Name
2	Email
3	Phone
4	Tag (industry)
5	Tag (size)
6	Source
7	Stage
8	Last touch (date)
9	Last touch (one line)
10	Next step
11	Next step date

The fixed dropdown values

- **Source:** referral, website, event, cold outreach, ads, partner
- **Stage:** New, Talking, Customer, Lost / Quiet
- **Tag (size):** big, medium, small

The three saved views (or filters)

1. **"Today"**: Next step date <= today AND Stage != "Lost / Quiet"
2. **"Going quiet"**: Stage = "Talking" AND Last touch date < today minus 14 days
3. **"New this week"**: Created >= today minus 7 days

Notion-specific setup

Create a database. Add the eleven columns above. For "Stage" use a select column. For "Source" use a select column. For "Last touch (date)" and "Next step date" use date columns. Save three filtered views.

NOTION / OFFICIAL

HOW TO CREATE DATABASE PROPERTIES AND VIEWS

- [notion.so / help / database-properties](https://notion.so/help/database-properties)
- [notion.so / help / views-filters-and-sorts](https://notion.so/help/views-filters-and-sorts)



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EXERCISE / 30 MINUTES

SET UP TODAY

Pick the tool. Create the columns. Add five real people from this week. Save the three views. Block the morning calendar slot. Done.

Tool chosen: _____

Date set up: _____

IX

Common *mistakes*.

1. *Picking the tool before agreeing on the columns*

The columns are the system. The tool just holds them. Agree on the five columns first, then pick the cheapest tool that fits.

2. *Importing every email contact you have ever had*

You will end up with two thousand rows you cannot maintain. Start with the people you have actually talked to in the last six months.

3. *Using "Pending", "Hot", "Warm", "Cold"*

Those words mean different things to different people on the team. "Talking" is a fact. "Warm" is a feeling. Use facts.

4. *Letting "Last touch" become a wall of text*

One line. If you need more, that is what the dedicated person-page or call-notes section is for. The grid view stays scannable.

5. *Setting "Next step" to "follow up"*

Useless. "Send pricing PDF", "reply to integration question", "ping after Q2 budgets". Verbs, not vibes.

6. *Trying to automate before doing it by hand for two months*

Automation amplifies your process. If your process is bad, automation makes it bad faster. Run it manually first. Then automate the boring bits.

7. *Sharing access with the whole team on day one*

Two people on day one. The founder and one other. Add more people only after the system is two months old and stable.

8. *Skipping the weekly review*

This is the most common reason memory systems die. The daily ritual keeps it alive. The weekly review keeps it useful. Both, or neither.

X

Official resources.

HUBSPOT ACADEMY / FREE

HUBSPOT CRM SOFTWARE COURSE

Covers contacts, deals, pipelines, lists, and reports. Two to three hours total.

- [academy.hubspot.com / hubspot-crm-software](https://academy.hubspot.com/hubspot-crm-software)



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HUBSPOT KNOWLEDGE BASE

GET STARTED, IMPORT, LISTS, PROPERTIES

- [knowledge.hubspot.com / get-started](https://knowledge.hubspot.com/get-started)
- [knowledge.hubspot.com / contacts / import](https://knowledge.hubspot.com/contacts/import)
- [knowledge.hubspot.com / lists / create](https://knowledge.hubspot.com/lists/create)
- [knowledge.hubspot.com / properties](https://knowledge.hubspot.com/properties)



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NOTION HELP CENTER

DATABASES, VIEWS, PROPERTIES

- [notion.so / help / intro-to-databases](https://notion.so/help/intro-to-databases)
- [notion.so / help / database-properties](https://notion.so/help/database-properties)
- [notion.so / help / views-filters-and-sorts](https://notion.so/help/views-filters-and-sorts)



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GOOGLE WORKSPACE LEARNING CENTER

GOOGLE SHEETS OFFICIAL TRAINING

- [support.google.com / Google Sheets training](https://support.google.com/Google%20Sheets/training)
- [support.google.com / data validation in Sheets](https://support.google.com/data-validation-in-sheets)



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*Memory is a **habit**.*

The tool will not save you. The columns will not save you. The ten-minute morning slot will. Block it on your calendar. Open the memory before email. Close the loop on yesterday before opening today.

Do this every workday for sixty days. After sixty days, the system runs you. Before sixty days, you run the system.

NEXT / HANDBOOK 03 / THE INSTRUMENTS

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