GuardenerAI

PLAYBOOK FOR 2027

Get more from your CRM in 2027

Most small businesses use a fraction of the CRM they pay for. This playbook turns it into the system that wins, keeps and gets paid by customers: principles you can apply one at a time, each with the steps, a check that tells you it is done, and worksheets to fill in with your team.

How to use this playbook

1. **Score yourself first.** The scorecard on the next page takes ten minutes and shows where to start.
2. **Pick your three lowest scores.** Work on those for the next month, not on everything at once.
3. **Follow the steps, then tick the check.** Every principle ends with a plain test you can see in your CRM.
4. **Use the worksheets.** Fields, stages, the weekly review and a follow-up sequence are ready to fill in.
5. **Score again in 90 days.** The plan at the back keeps the order sensible.

Written for owners and small teams on any CRM. Where a step maps to something specific in GuardenerAI, a short note says how; everything else works the same anywhere.

Score your CRM today

0 = no · 1 = partly · 2 = yes

Answer for how things are on a normal week, not on your best one. Be strict: if you have to think about it, it is a 1.

	PRINCIPLE	YOU SCORE A 2 WHEN	SCORE
01	**One record per customer**	A search for any customer returns one record, not two or three.	0 · 1 · 2
02	**Every field earns its place**	Each field you ask people to fill is used in a view, a report or a message.	0 · 1 · 2
03	**Stages describe what the buyer did**	Two people put the same deal in the same stage without discussing it.	0 · 1 · 2
04	**Every lead has an owner and a next step**	No open lead lacks a named person and a dated task.	0 · 1 · 2
05	**New enquiries are answered by routine**	Someone checks new enquiries at set times every working day.	0 · 1 · 2
06	**Conversations live on the record**	Anyone can open a customer and see the last email, call and meeting.	0 · 1 · 2
07	**The weekly review runs from the CRM**	Your pipeline meeting uses the CRM screen, not a spreadsheet copy.	0 · 1 · 2
08	**Follow-up is a sequence, not a memory**	Quotes and enquiries get written follow-ups on a set schedule.	0 · 1 · 2
09	**AI looks things up; people decide**	The team asks the CRM's AI for history and drafts, and checks what it says.	0 · 1 · 2
10	**Your best prompts are team commands**	Good prompts are saved where the whole team can run them.	0 · 1 · 2
11	**Automate the routine, approve the risky**	Anything sent to customers by automation passes a person first, or has earned the right not to.	0 · 1 · 2
12	**Your data is ready for AI**	Source, status and consent are filled in on most records.	0 · 1 · 2
13	**Past customers come back**	You can list lapsed good customers in one click and have a plan for them.	0 · 1 · 2
14	**Close and get paid in one place**	Signatures and invoices sit on the same records as the deal.	0 · 1 · 2

Total _____
out of the maximum

Lowest three
_____

Score again on
_____

PART 1

Build records worth trusting

Principles 01 to 04

Everything else in this playbook depends on the records. If the team does not trust what the CRM says, they keep their own notes, and the CRM becomes a place where data goes to be ignored.

- [ ]

Principle 01

One record per customer

Duplicates split a customer's history in two, so one person follows up while another has already closed the deal.

1. Search for your ten best customers by name and by email. Note every duplicate you find.
2. Merge them, keeping the most recent email and phone, and the oldest created date.
3. Decide your matching rule: same email, or same company name plus phone.
4. Turn that rule on so new duplicates are flagged before they pile up.

> IN GUARDENERAI
> Duplicate rules flag likely matches into a review queue. Imported files are checked by a nightly scan rather than on the way in, so review the queue the day after an import.

Done when a search for any of your ten best customers returns one record.

- [ ]

Principle 02

Every field earns its place

Each extra field is a small tax on everyone who saves a record. Fields nobody reads get filled with guesses, and guesses make every report wrong.

1. List every field on your lead and customer forms in the field audit worksheet.
2. For each one, write where it is used: a view, a report, a message or a decision.
3. Hide or delete the fields with no answer.
4. Make the few that matter required, and say why in the error message.

> IN GUARDENERAI
> Validation rules stop a save until a required detail is present, and show the message you write, such as "Add an email or a phone number before saving this lead."

Done when every field on the form has a written use.

Principle 03

Stages describe what the buyer did

"Proposal" can mean you are writing one or they have read one. A stage defined by a buyer action is a fact; a stage defined by hope is a forecast nobody believes.

1. Write each stage as something the buyer did: "Agreed a call", "Received a quote", "Said yes in writing".
2. Add an exit test for each stage in the stage worksheet.
3. Walk every open deal through the new definitions once, together.
4. Keep the list short: if two stages always move together, merge them.

> IN GUARDENERAI
> Opportunities move across a board of the stages you set, so the definitions you write here become the columns the team works from.

Done when two people place the same deal in the same stage without talking.

Principle 04

Every lead has an owner and a next step

A lead that belongs to everyone belongs to no one. The single most common reason enquiries go cold is that nobody was sure it was theirs.

1. Decide who owns new leads by default, and who covers when they are away.
2. Filter for open leads with no owner, and assign them today.
3. Filter for open leads with no open task, and give each a dated next step.
4. Save both filters as views and check them in the weekly review.

> IN GUARDENERAI
> Leads can wait in a shared queue where a teammate chooses Accept or Release. There is no automatic round robin, so name the person who works the queue each day.

Done when both saved views are empty.

PART 2

Make the daily rhythm automatic

Principles 05 to 08

A CRM pays for itself in the small habits: the reply that goes out in the morning, the note that is on the record when a colleague picks up the phone, the follow-up that happens on day three instead of never.

Principle 05

New enquiries are answered by routine

The first business to reply well usually gets the conversation. Speed comes from a routine, not from heroics.

1. Send every enquiry channel (forms, shared inbox, messages) into one place in the CRM.
2. Set check times, for example 9:00, 12:00 and 16:00, and put them in someone's calendar.
3. Write a first reply for your most common enquiry and save it as a template.
4. Track the time to first reply in the weekly review.

> IN GUARDENERAI
> Website enquiries arrive as Leads without an owner or an alert, which is exactly why the check times matter. Email templates are applied from the Email section of the record.

Done when the check times are in a calendar and the template is saved.

Principle 06

Conversations live on the record

If the last email lives in one person's inbox, the customer has to repeat themselves whenever someone else answers.

1. Connect each person's mailbox to the CRM.
2. Agree that customer email is sent from the record, not from a personal inbox.
3. Log calls and meetings as tasks with an outcome, the same day.
4. Spot-check five records a week: can you tell what happened last?

> IN GUARDENERAI
> Gmail, Outlook and IMAP mailboxes connect, and mail with existing contacts is logged to the record. Compose on a Lead, Person or Company sends from your mailbox and logs it there. Calls are logged as tasks with an outcome such as Connected or Voicemail.

Done when all five spot-checked records show the last contact.

Principle 07

The weekly review runs from the CRM

The moment someone exports to a spreadsheet for the meeting, the spreadsheet becomes the truth and the CRM falls behind.

1. Book thirty minutes, same day and time every week.
2. Run the agenda on the weekly review worksheet, from the CRM screen.
3. Update stages and next steps in the meeting, not after it.
4. End with three actions, each with an owner.

> IN GUARDENERAI
> Insights, Dashboard shows revenue won, pipeline added, new leads and tasks completed for the period, beside the Opportunities board.

Done when four reviews in a row ran without a spreadsheet.

Principle 08

Follow-up is a sequence, not a memory

Most deals are lost to silence, not to a competitor. A written sequence makes the second, third and fourth touch happen without anyone remembering.

1. Pick one moment that always needs follow-up, such as a quote sent.
2. Write the messages with the sequence worksheet: what each one adds, not "just checking in".
3. Set the waits between them, and a clear last message.
4. Agree who takes people out when they reply.

> IN GUARDENERAI
> Journeys send a sequence to People or Leads you add by hand or who join a segment, with waits from an hour to thirty days. A journey does not stop by itself when someone replies, so step four matters.

Done when one sequence is live and someone owns step four.

PART 3

Put AI to work, safely

Principles 09 to 12

In 2027 the CRM is also where your AI works. It is only as good as the records it reads and the limits you give it, so this part is half about AI and half about the data underneath it.

Principle 09

AI looks things up; people decide

The best early use of AI in a CRM is the lookup nobody has time for: what happened with this customer, what did we promise, what should the next email say.

1. Before every call this week, ask the AI to summarise the customer's history.
2. Ask it to draft the follow-up, then edit before sending.
3. Check one fact in each answer against the record.
4. Note what it got wrong, and fix the record if the record was the cause.

> IN GUARDENERAI
> The assistant in chat finds and reads records and writes drafts as text in the chat. It does not add up totals across your whole database, so use the Dashboard for numbers.

Done when the team uses it before calls without being reminded.

Principle 10

Your best prompts are team commands

One person usually discovers the prompt that works. Saving it means the whole team gets the same quality, not the same blank box.

1. Collect the three prompts people use most.
2. Rewrite each so it works for any record: "Summarise this customer's last three months and suggest a next step."
3. Save them as named commands.
4. Review them each quarter and retire the ones nobody runs.

> IN GUARDENERAI
> Admins save prompts under Settings, Commands, and anyone runs them by typing / in the chat.

Done when three commands are saved and used.

Principle 11

Automate the routine, approve the risky

Automation that sends to customers can go wrong at scale. Start with a person approving every message, and loosen it only where the drafts are consistently right.

1. List what you would like automated, and mark each item internal or customer-facing.
2. Automate the internal items first.
3. For customer-facing items, require approval for the first weeks.
4. Relax approval only for messages that went out unedited for a month.

> IN GUARDENERAI
> A journey step can have AI write the message, and those drafts can be set to wait on the Approvals page until a person approves them.

Done when every customer-facing automation has an approval rule written down.

Principle 12

Your data is ready for AI

AI answers from what is on the record. Missing sources, stale statuses and unknown consent turn into confident wrong answers and messages you should not have sent.

1. Make lead source and status required from today.
2. Record marketing consent and where it came from on every new contact.
3. Close or archive deals that have not moved in six months.
4. Fix the ten most-used records by hand; they are the ones AI reads most.

> IN GUARDENERAI
> Each record's Activity tab keeps the history of field changes, so you can see when a status changed and from what.

Done when source and status are filled on every record created this month.

PART 4

Grow from the customers you have

Principles 13 and 14

The cheapest revenue is from people who already know you. The last two principles make sure the CRM brings them back and that money is collected from the same place the deal was won.

☐ Principle 13

Past customers come back

A customer who bought twice and then went quiet is the best lead you have. Most businesses never ask them back, because nobody can see who they are.

1. Define "lapsed": a good customer with no purchase in, say, twice their usual gap.
2. Build that list as a saved segment.
3. Write a short sequence that gives a reason to return, not a discount by default.
4. Review who came back after a month, and adjust the wording.

> IN GUARDENERAI
> Segments can group people by recency, frequency and value (RFM), and a journey can start when someone joins the segment.

Done when the lapsed segment exists and one message has gone out.

☐ Principle 14

Close and get paid in one place

When the contract, the invoice and the payment live in three tools, nobody sees the whole customer, and chasing money becomes a separate job.

1. List every tool a deal touches after "yes": documents, signature, invoice, payment.
2. Move the steps your CRM can do into it, one at a time.
3. Keep the signed document and the invoice on the customer's record.
4. Add "paid" to the weekly review, not just "won".

> IN GUARDENERAI
> Documents go out for e-signature from the record, and invoices are issued from the Company with an optional payment link. Accounting and payment links are switched on per workspace.

Done when the last five won deals have their signature and invoice on the record.

If you only do three things this quarter

- **Principle 04:** every lead has an owner and a next step.
- **Principle 07:** the weekly review runs from the CRM.
- **Principle 08:** one follow-up sequence, live.

They cost almost nothing and they move revenue fastest, because they stop leads going cold.

WORKSHEETS

Field audit

Principle 02

One row per field on your lead or customer form. If the "Used for" column is empty, the field goes.

FIELD	WHO FILLS IT	USED FOR	REQUIRED	KEEP
Lead source	*Whoever creates the lead*	*Monthly report: which channel brings customers*	*Yes*	*Yes*
Fax number	*Nobody*		*No*	*No*
			☐	☐
			☐	☐
			☐	☐
			☐	☐
			☐	☐
			☐	☐
			☐	☐

Stage definitions

Principle 03

STAGE NAME	THE BUYER HAS	EXIT TEST: MOVE ON WHEN
Call agreed	*Accepted a time to talk*	*The call happened and they asked for a price*
Quote received	*Opened or acknowledged the quote*	*They said yes in writing, or asked for changes*

WORKSHEETS

The thirty-minute weekly review

Principle 07

TIME	WHAT	FROM WHICH SCREEN
0 to 5 min	**Last week's three actions.** Done, or carried over with a reason.	Your notes from last week
5 to 10 min	**The numbers.** New leads, pipeline added, won, paid. Better or worse than last week, and why.	Dashboard
10 to 15 min	**Leads with no owner or no next step.** Assign each one in the meeting.	The two saved views from principle 04
15 to 25 min	**Deals that did not move.** Each owner says what the buyer is waiting for. Update the stage or the next step now.	Opportunities board
25 to 30 min	**Three actions for next week**, each with one owner.	Write them below

ACTION	OWNER	BY

A follow-up sequence after a quote

Principle 08

Each message adds something. Replace the bracketed parts; keep them short.

SAME DAY: THE QUOTE

Hi [first name], here is the quote for [what they asked for]. The short version: [one line on price and what is included]. If anything is unclear, reply here and I will sort it.

DAY 3: THE ANSWER TO THE USUAL QUESTION

Hi [first name], most people at this point ask [the question you hear most]. The answer is [your answer]. Happy to go through it on a short call if useful.

DAY 7: PROOF

Hi [first name], in case it helps, here is how [a similar customer, with permission] used [what you sell] to [the result]. Is there anything stopping you going ahead?

DAY 14: THE CLEAR LAST MESSAGE

Hi [first name], I will not keep chasing. If the timing is wrong, just say and I will check back in [month]. If it is a yes, reply and we will get started.

YOUR 90-DAY PLAN

Do it in order, a little each week

Trying all fourteen principles at once is how CRM projects stall. This order puts the habits that protect revenue first and the AI work after the records can support it.

WHEN	FOCUS	PRINCIPLES	DONE
Week 1	**Score yourself** and agree the three lowest with the team.	Scorecard	☐
Weeks 1 to 2	**Owners, next steps and the enquiry routine.** Nothing goes cold while you fix the rest.	04, 05	☐
Weeks 2 to 4	**Records worth trusting:** duplicates, fields, stage definitions.	01, 02, 03	☐
Weeks 3 to 6	**The rhythm:** conversations on the record, the weekly review, one sequence.	06, 07, 08	☐
Weeks 6 to 10	**AI at work:** lookups, team commands, approval rules, AI-ready data.	09 to 12	☐
Weeks 10 to 13	**Growth:** the lapsed-customer segment, then closing and payment in one place.	13, 14	☐
Week 13	**Score again** and pick the next three.	Scorecard	☐

Want to see it on your own data?

A walkthrough shows each principle in GuardenerAI on a workspace set up for a business like yours.

Starting from scratch?

GuardenerAI has a free plan with the CRM, AI assistant, marketing, meetings and e-signatures in one workspace.