

A System For Selling

Step-by-step instructions for how to set up a CRM sales system using Gravity Forms, Zapier, and Trello.

By Brian Casel - Based on the article, [A System For Selling](#)

[*Tweet the original post!*](#)

Here are my exact steps for setting up a CRM sales system the same we we've done for our Productized Service business:

STEP 1: WordPress Website

Not really a step, but I just wanted to note that our site is built using WordPress.

STEP 2: Purchase & Install Gravity Forms

For our consultation form, where new leads enter their information, we use Gravity Forms.

Go to <http://gravityforms.com> to purchase a license for this premium forms plugin for WordPress. You'll need their "Developer" license (\$199 as of this writing) in order to take advantage of their Zapier add-on (see later step).

Once you own a Gravity Forms license, install and activate the plugin in your WordPress site.

STEP 3: Create Your Consultation Form

Create a Form using Gravity Forms to use as your consultation form. It can contain any fields you wish to collect. Here's what ours looks like for Restaurant Engine:

What do you do?

Where are you located?

I'd like to...

- Make it easy for new customers to find us
- Enable online ordering for takeout & delivery
- Promote our upcoming events, live music, etc.
- Easily manage my menu & specials
- Take reservations through my website
- Something else...

Any initial questions or comments?

Does your restaurant currently have a website?

- Yes
- No

First Name

Last Name

Email Address

Phone Number

Your phone number including area code, or your Skype ID

Request My Free Consultation

Once your form is created, embed the form on a page in WordPress. You'll probably want to give it its own page (called "Request a Consultation" or something), and point all your call-to-action buttons to it.

STEP 4: Activate the Zapier Add-on in Gravity Forms

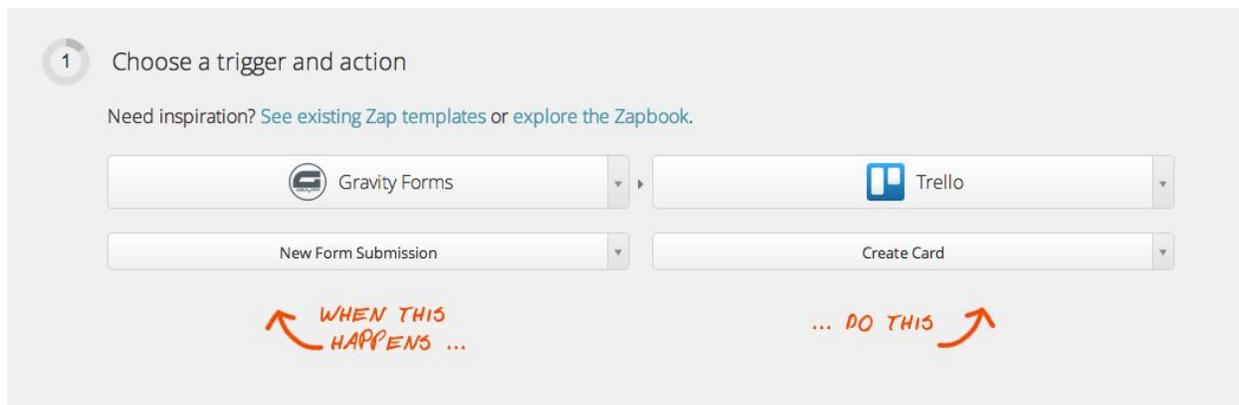
In WordPress, go to Forms > Add-ons > Activate the Zapier add-on.

STEP 5: Sign up for a Zapier Account

If you don't have one already, sign up for a Zapier account (approx \$15/month, depending on your needs).

STEP 6: Create a new Zap in Zapier

Select Gravity Forms as the "Trigger" app and select Trello as the "Action" app.



STEP 7: Connect Zapier to Your Gravity Form

In Zapier, copy the provided webhook URL:

2 Select a Gravity Forms account

Before you start: make sure you have the Gravity Forms plugin with the [Zapier add-on](#) installed.

Then just visit the **Form Settings > Zapier** settings of the form you'd like to trigger this zap with and add the below URL to your setup. Be sure to mark it as active and save it!

[Click for more detailed instructions!](#)

Use this:

`https://zapier.com/hooks/catch/n/5e4z5/`

Copy to clipboard

Then log into WordPress, go to your Gravity Form and go to the Zapier settings, then paste your Zapier webhook URL there:

Zapier

ID: 31 Form Name: Consultation Request

[Form Editor](#) [Form Settings](#) [Entries](#) [Preview](#)

- Form Settings
- Confirmations
- Notifications
- Zapier**

Zap Name * [?](#)

Webhook URL * [?](#)

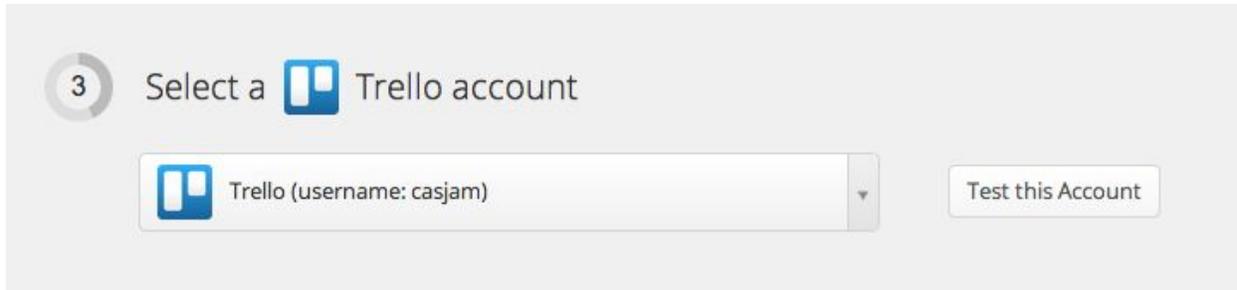
Active [?](#) Yes No

Conditional Logic [?](#) Enable

[Update Zapier Feed](#)

STEP 8: Connect Your Trello Account

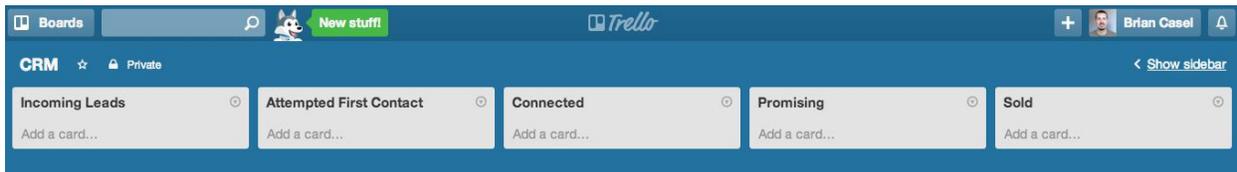
In Zapier, connect your Trello account



STEP 9: In Trello, Create a Board to use as your CRM

Call it “CRM” or “Leads” or whatever you want. Create multiple lists. Here are the ones we use in our business (change according to your preferences):

- Incoming leads (<-- new consultation form submissions will automatically create cards here)
- Attempted contact (called, but didn't pick up)
- Connected (spoke to them once or twice, but not sold yet)
- Promising (very interested, high-quality lead)
- Sold



STEP 10: Match Your Form to Your Trello Board (using Zapier)

In Zapier, select the Trello board you create (“CRM” or whatever you named it).

Then select the name of the first list in your board (“Incoming Leads” or whatever you named it).

This is what our's looks like:

5 Match up  Gravity Forms Form Submission to  Trello Card

Board *(required)*

Restaurant Engine Sales Conversations ▼

List *(required)*

New Leads To Call ▼

STEP 11: Map the Form Fields to the Trello Card Name & Description

In Zapier, map specific form fields however you see fit.

You can make use of Markdown to make the style/formatting of the description easy to read and scan.

Here's how ours is set up:

Name *(required)*

First Name - Last Name - What's The Name Of Your Restaurant?

HelpScout Conversation
(paste HelpScout Conversation URL here)

Insert  fields

Name

First Name Last Name

Restaurant Name

What's The Name Of Your Restaurant?

Website

Website Address

Where are you located?

Where Are You Located?

Phone Number

Phone Number

Email Address

Email Address

What do they do?

What Do You Do? What Do You Do (other)?

What are their goals?

Easily Manage My Menu & Specials
Enable Online Ordering For Takeout & Delivery
Make It Easy For New Customers To Find Us
Promote Our Upcoming Events, Live Music, Etc.
Take Reservations Through My Website
I'd Like To...

Their initial questions or comments:

Any Initial Questions Or Comments?

Tracking

Form: Consultation Request

Source: Source

Medium: Medium

Term: Term

Content: Content

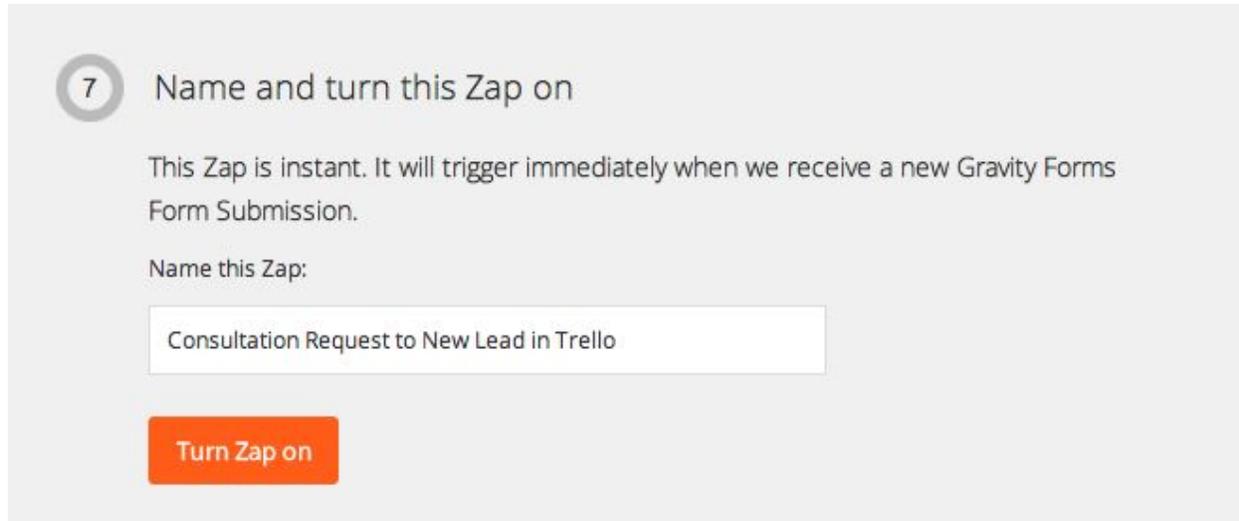
Campaign: Campaign

Segment: Segment

Link Clicked: Link

Last Viewed Page: Referring Page

STEP 12: Turn the Zap On



7 Name and turn this Zap on

This Zap is instant. It will trigger immediately when we receive a new Gravity Forms Form Submission.

Name this Zap:

[Turn Zap on](#)

STEP 13: Test Your Form

Submit your consultation form. Within a couple of minutes, it should automatically create a card in Trello in your incoming list. That card should be populated with all of the submitted information.

Here's what one of our lead cards looks like:



Ben Rosen - Rocky Mountain slices in list Attempted 1st Contact



Due Date

Sep 25 at 1:00 AM (past due)

Description [Edit](#)

HelpScout Conversation

<https://secure.helpscout.net/conversation/46493665/1779/>

Name

Ben Rosen

Restaurant Name

Rocky Mountain Slices

Website

Where are you located?

Denver CO

Phone Number

6150100005

Email Address

ben.rosen@gmail.com

What do they do?

I own a food truck

What are their goals?

Make it easy for new customers to find us

Their initial questions or comments:

Add

Members

Labels

Checklist

Due date

Attachment

Actions

Move

Copy

Subscribe

Archive

[Share and more...](#)

Now Sell!

By Brian Casel - Based on the article, [A System For Selling](#)

[Tweet the original post!](#)

