

About the CBM CRM

Welcome to the Cleveland Business Mentors CRM. This guide is your starting point. It doesn't assume you've used a system like this before, and it won't ask you to do anything yet — its job is to help you understand what the system is, find your way around it, and read the information it holds. Once you're comfortable with the basics here, a separate guide for your specific role will walk you through the tasks you'll actually perform.

What a CRM is. CRM stands for "customer relationship management," but at CBM it's easiest to think of it as the organization's shared memory: a single, organized place that keeps track of the people CBM works with and the work CBM does with them, so that information lives in one trusted location instead of being scattered across email, spreadsheets, and individual notebooks. CBM's CRM runs on a platform called **EspoCRM**. You don't need to know anything about the platform itself to use it well — this guide explains everything in CBM's own terms.

Why CBM uses one. CBM's work depends on relationships that often involve several people over a long stretch of time — a business owner, the mentor helping them, the coordinator who made the match, and sometimes a referring partner or a supporting donor. The CRM keeps everyone working from the same up-to-date picture. When information lives in the system rather than in one person's head, nothing is lost when someone is away, a mentoring relationship can be picked up smoothly by whoever needs to step in, and CBM can see the larger picture of who it serves and how well.

What the system keeps track of. At a high level, the CRM holds two kinds of things: the people and organizations CBM works with — business owners and their companies, mentors, partner organizations, and donors — and the mentoring work itself — the relationships between mentors and the people they help, and the individual meetings within those relationships. You'll meet each of these by name in Section 4. For now, the key idea is that everything in the system connects back to a person, an organization, or the work being done.

How to use this guide. Read it once from start to finish before you begin working in the system; it's short by design. You can return to any section later as a refresher. Whenever a term appears in **bold**, it's a piece of CBM CRM vocabulary worth remembering. At the end, you'll be pointed to the guide for your role, which covers the day-to-day tasks that are yours to do.

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