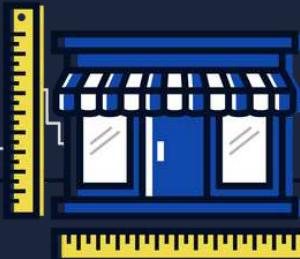


THE BUSINESS LEAD



WINTER 2025

OPEN FOR BUSINESS

IMPROVE CUSTOMER EXPERIENCE AND SATISFACTION

Your customers drive your business, which is why it's important to know how they interact with your brand. One way to gather customer interactions is using a Customer Relationship Management (CRM) software.

CRM software can provide a wealth of benefits for your small business including customer retention and increased sales by organizing contacts, providing consistent communication, and building relationships.

If you would like to increase customer satisfaction, grow sales, and become more efficient, CRM software may be a good fit. Read more about this tool on page 2.

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Using Customer Relationship Management (CRM) to Grow Your Small Business

Because CRM software provides such a breadth of benefits, many types of businesses and teams can benefit from it. Businesses of all sizes, from solo freelancers to enterprise-level corporations, can use CRM technology effectively. After all, the key functions of a CRM are organization, centralized task management, marketing automation, and communication, which are important to every business's success.

CRM is a type of software that helps businesses manage, track and organize their relationships with customers. A CRM can help you store customer data such as user behavior, how long a customer has been with your business, purchase records, and notes on sales interactions, which you can use to optimize your sales and marketing processes and improve customer service across your organization. Fortunately, there are plenty of free and inexpensive cloud-based programs. Here are six CRM tools that can help your business thrive.

Agile CRM: Good choice for solopreneurs

Agile CRM is free for up to 10 users and 1,000 contacts. Pricing starts at \$9.99 per user per month with annual prepayment and social monitoring and marketing automation. Solopreneurs, startups and small teams can appreciate that Agile CRM provides tools for lead scoring, email tracking and help desk ticketing. It also features built-in form and landing page builders and unlimited deals and tasks. But, the free version doesn't integrate with Shopify or Stripe and only supports one third-party integration.

Britix24: Free CRM: Communication and collaboration tools

Britix24 is an all-in-one platform with built-in customer relationship management, team collaboration, sales intelligence and project management tools. It's free for an unlimited number of users, and paid plans start at \$39 for five users with annual prepayment. Unlike other small business CRMs, Britix24 offers cloud or on-premise deployment options.

Freshsales: Excellent customer service options

Freshsales (formerly Freshworks CRM) is free for unlimited users, and paid plans start at \$15 per user per month with annual billing. Plus, it has a longer free trial (21 days) for paid plans than HubSpot or Agile CRM. The software helps you monitor deal progress with a visual sales pipeline and includes a built-in phone dialer.

Freshsales stands out for its customer service, as even the free plan offers 24/5 (24-hours, five days a week) phone, chat and email support. Other vendors limit customer service to email or only offer a knowledge base for businesses using the free version.



HubSpot: Unlimited users and a million contacts

HubSpot provides a free plan for unlimited users and up to one million contacts. Paid plans come with a 14-day free trial and plans start at \$45 per month with an annual prepayment. It's an excellent choice for companies with a large volume of customer records, as other free plans are typically limited to 5,000 or fewer records. In addition, HubSpot's free plan is packed with features for managing customers and sales.

Streak: Recommended for Gmail Users

Streak's free version includes essential CRM functions, such as private pipelines, email tracking and unlimited contacts. It integrates with Google, allowing access to CRM data in Gmail, Sheets, Chat, Drive and Calendar. Paid plans start at \$15 per user per month with annual billing.

Zoho CRM: Free workflow automation tools

Zoho CRM is free for up to three users, and paid plans start at \$14 per user per month with annual billing. It stores up to 5,000 records, supports workflow automation and offers team collaboration tools. Zoho CRM works well for small teams that want to centralize their leads, deals and contacts. It allows colleagues to message each other, leave status updates or share files from the browser-based program or mobile app.

source: uschamber.com and businessnewsdaily.com



USING INSTAGRAM TO PROMOTE YOUR PET-CARE BUSINESS

Instagram is a great social media platform for any business. With so many features, millions of users, and its highly visual nature, Instagram can really do wonders to promote your business. And the pet-care industry is no exception be it a veterinary care business, pet grooming service or a pet sitting business!

Develop Content-When developing a content strategy for your Instagram account, you want to consider when to post, how often to post, and what kind of content to post. With that in mind, choose whether you're posting pictures, videos, or graphics, etc. with the goal for each post, and how a post relates to your business and branding.

Create Video Content for Your Pet-Care Business

Video is on the rise! Social media users have a lot to digest when they open up their social media apps. Video content is a great way to deliver content in an easy-to-digest format.

Using Instagram Reels for Your Pet-Care Business

Instagram Reels were introduced in 2019 and were an almost immediate hit. These bite-size, viral-friendly videos are easy for social media users to binge-watch. You can pair your short video with music or audio and even add cool effects or text to further drive home your point.

Using Instagram Stories for Your Pet-Care Business

Instagram Stories are the perfect place to show behind-the-scenes or more in-the-moment content. These quick videos or photos expire after 24 hours on the app, so they become the place to go to see what a business is up to at any given moment.

For a pet business, Instagram Stories are a great place to showcase a day's visits or walks. Make sure to let your clients know to check out your Instagram Stories for behind-the-scenes snippets of their pets!

source: petsit.com

Old Buildings Renewed

110 E. Main Street is where the Murphy & Roverud, P.L.L.P. office is currently located.

The Sprague Bank building was built in 1902 after a fire in 1889 destroyed the first structure. It is located where the log cabin of Caledonia's founder Samuel McPail stood. Sprague Bank was the first bank in town and this building developed into a commercial center. A men's clothing store occupied the middle portion until 1952 and other occupants included a drug store, law firm, optometry, real estate agency, abstract office, photo studio and chiropractic office.

The second floor had a telephone company office, dental office, and Masonic Hall. A medicine company was in the basement along with a print shop. On the front of the building note the old burglar alarm box and the clock that told townspeople the time for many years. The Sprague National Bank moved to a new building on Kingston and Washington Streets in 1980. It is now Merchants Bank.

source: Houston County Historical Society



BUSINESS SPOTLIGHT

Blue Ribbon Grooming offers grooming, spa services, nail trims, and much more!

Located at 503 Old Highway Drive (at the Caledonia Veterinary Care location) certified dog groomer, Julia Crawford studied pet grooming at the International Animal Care College, along with studying Small Animal at Madison Area Technical College.

Julia specializes in sporting breed grooms, but all other types of cuts are offered as well. From puppyhood to senior dogs, Julia has the expertise and knowledge to care for your pet.

Get your pup ready for the holidays with a bath, nail trim, brush out or cut, and don't forget, regular grooming (including over the winter months) is essential to maintain a healthy coat.

All grooming services are by appointment. Call 507-725-3380 to schedule.



**Houston County Good Roads and
Automotive Owner Association
Photo including the Sprague
Bank Building
c.a. 1908-09**



TRANSITION PLANNING FOR YOUR MATURE BUSINESS

Selling Your Business:

Either by choice, opportunity or necessity, your business will eventually face an organizational change. Transferring your business is probably one of the biggest steps of your life. Yet many small business owners have no strategy for such a change. Here are some important things to include in a smart, successful organizational change management process and plan:

Transition is the time between when you make your decision to sell or merge, go public or retire. A key group of advisors including an accountant, attorney, financial advisor, and banker will be able to assist you with implementing a transition plan. The plan should include:

1. Identifying the scope and objective of the transition. Consider which employees, departments, products, services and resources will be affected.
2. Establishing a timeline that includes key milestone dates. If you're not sure how long a specific task will take, consult your employees or specialists to get an accurate guesstimate.
3. Detailing the transition governance. This section of your plan covers:
 - Roles and responsibilities
 - How you'll communicate during the process
 - The process for escalation
 - How you'll assess transition progress
 - When and how to conduct meetings
 - How you'll report on the status of changes.
 - Milestones you'll seek
 - How you'll manage your resources
 - The process for training employees

Establishing the Succession Team:

One of the keys to a successful transition is being sure that the people who take over for you are prepared to succeed.

If you're selling or merging the company, you may have a limited amount of time to identify a succession team (which may come from your company and the purchasing or merging one). But if you're retiring or simply disengaging yourself from the company's operations, planning your succession team can and should begin years before.

One reason an advance succession plan is critical in small companies is because your talent pool is more limited than in larger organizations. Also, if you begin the process early, you can establish a career path and a leadership development and management training program for superior performers whom you believe can be possible successors.

source: thehartford.com



If you've decided to sell your business, you'll need to prepare a Sales Agreement defining everything in the business that you intend to sell. Be sure to address all purchase terms and components, including:

- Seller, buyer, and business names
- Background information
- Purchase price, assets being sold (including a complete list of inventory), and how those assets will be allocated
- Financial statements (usually as attachments)
- Non-compete covenant
- Terms of agreement and payment terms
- Seller and buyer representation and warranties
- Access to business information
- Date of closing, and how the business will be run in advance of that date
- Contingencies
- Fees (including broker fees)

3 Things Buyers Look For

Current Market Situation: Buyers looking to purchase an existing business want to know ahead of time if they'll be participating in a hand-off or a recovery mission. Having a consistent customer base is appealing to potential buyers. It's worth noting that when you're looking to sell a business, customers who are loyal to your business, product, or service are extremely valuable.

Profitability: The promise of profitability needs to be a concrete one, that's supported by proper documentation. For instance, organizing your annual income in terms of seasonality can provide potential sellers with a snapshot of typical profitability against industry trends.

Growth Potential: Determining whether your business is structured for maintenance or growth will depend on your current situation. Begin by assessing the scalability of your business. Is the organization structured for growth or maintenance? Can the organization's current space accommodate growth, or is space already maximized? Similarly, is there appropriate real estate to promote growth or expansion?

source: twoworldminnesota.com

Upcoming Events

Caledonia Forward Consultation Services: *FREE consultation services for businesses looking to expand their skill sets relevant to their business goals. Meet Caledonia Forward's E Navigator Dave Carlson at the Wired Rooster Coffee Shop from 8:30am to 10:30am on the following dates: 12/10, 12/17.*

Caledonia Forward Build Your Own Business Workshop Series: *Sessions #2 and #3 will be held on Wednesday, December 10 from 5:00pm-7:30pm at Mainspring 404 E. Main Street. The event is free but registration is required by calling 608-235-3312.*

Caledonia Winter Parade: *Friday, December 5 beginning at 7:00pm. Route includes Grant Street to Pine Street then following Main Street to Kingston ending at Merchant's Bank. Sponsored by Caledonia Founders Day.*

Christmas Home Tour: *Saturday, December 13 4:00-6:00pm. Join us as we explore three historic and festive homes decorated for the holiday season! Tickets sell for \$20 for one admission and are available at The Wired Rooster Coffee Shop or at City Hall. Deadline to purchase a ticket is December 12. The event is a fundraiser for the Caledonia Chamber Tourism Group.*

BUSINESS DEVELOPMENT



Caledonia Convenient Care located at 405 S. Hwy 44/76 (in the Smooth Toe/Lifestyle Fitness building) and owned and operated by Amanda Middendorf, Nurse Practitioner opened in early October. The business provides comprehensive healthcare options for local residents. Care includes general care, vaccinations, and non-urgent issues (ear and throat pain, rashes, minor burns, cold/flu symptoms, sprains/strains etc.).

Rural Entrepreneurial Venture (REV) is a proven entrepreneurial development program designed to advance small town economies through a targeted business approach. REV provides coaching, resources and connections throughout the visioning and implementation process as each community explores what economic development means for their town.

REV partner program Caledonia Forward is excited for their third year as a REV program and has some sensational events planned for the new year including some inspirational workshops, informative pod-casts, and special events promoting entrepreneurship in Caledonia. Check our Facebook page often for future events and activities.

<https://www.facebook.com/CaledoniaForward/>