PapiCreate

CRM FOR BUSINESSES THAT SELL SERVICES

A CRM that helps you sell — not just store clients

Clubs, clinics, salons, studios, schools — anywhere there is a client, a booking with a specialist and a return visit. Leads, calls, front desk and reports in one system built around your processes.

papicreate.com · Telegram @papicreate_bot

SOUND FAMILIAR?

Where a service business loses clients and money every day

Leads get lost

Website, Instagram, phone, messengers — each channel has its own “owner”, and the first reply comes hours later.

“I called” — but there was no call

Call results are written from memory, nobody knows why clients say no, nobody checks call quality.

Clients quietly don’t renew

Someone remembers the client only when the membership or course has already ended and they haven’t come for weeks.

The owner sees the numbers too late

Reports are compiled by hand at month end; discounts and cash “mistakes” are noticed when it’s too late.

WHAT IT IS

One system instead of spreadsheets, notebooks and five chats

Clients

Client profile: memberships and packages, visits, balance, calls, notes.

Front desk

Card scan, check-in and check-out, lockers, selling services on the spot.

Sales

Lead queue, renewal calendar, at-risk group, call maps.

Calls

IP telephony, recordings, transcription and scoring of every call.

Money

Cash desk, client balance, deposits, online payment, discount control.

Bookings

Group schedule, personal sessions, guest visits via a bot.

Reports

Money, sales, managers, churn — and every morning in Telegram.

Team

Roles, permissions, shifts, a staff app inside Telegram.

Works in the browser and on the phone, for one location or a network of branches. Nothing to install. Screens in this deck come from a live demo in Ukrainian.

WHO IT’S FOR

For any business that sells services

The logic is the same: client → booking with a specialist → visit → payment → return visit. Only the words and the rules change.

Sports clubs & fitness

Trainer · membership · renewal, group classes

Clinics & dentistry

Doctor · appointment, treatment course · follow-up, lab tests

Salons & barbershops

Stylist · booking · reminder about the next visit

SPA & massage

Therapist · session pack, gift card · sessions left

Schools & courses

Teacher · course, lesson · monthly payment, missed lessons

Dance, yoga, martial arts

Coach · class pass · group schedule

Veterinary clinics

Vet · appointment, vaccination · scheduled shots

Rehab & therapists

Specialist · sessions, program · next session

Also: kids’ centres, cosmetology, car service, coworkings, photo studios — anywhere clients come back.

HOW IT ADAPTS · CLINIC EXAMPLE

Same processes — different words

Sports club	Clinic
Trial workout request	Consultation request
Trainer and personal session booking	Doctor and appointment booking
Membership and renewal	Treatment course and follow-up visit
“Stopped coming” — a call	“Time for a check-up or tests” — reminder and call
Trainer leaves a note after the session	Doctor leaves recommendations in the patient profile

Reminders

A day before the appointment, when test results are ready, before the next check-up — in Telegram or SMS.

Feedback

Rating after the visit; a complaint becomes a task with an owner and a deadline.

Front-desk calls

An appointment call map, call scoring, missed calls in the queue.

PRINCIPLE

Every role starts the day on its own screen — and sees only what needs doing

Sales

Lead queue, call calendar, call map, personal plan.

Front desk

Card scan and a clear “let in or not”, who is expected today, payments.

Specialists

Trainer, doctor or stylist — their bookings, clients and stats in Telegram, no paper.

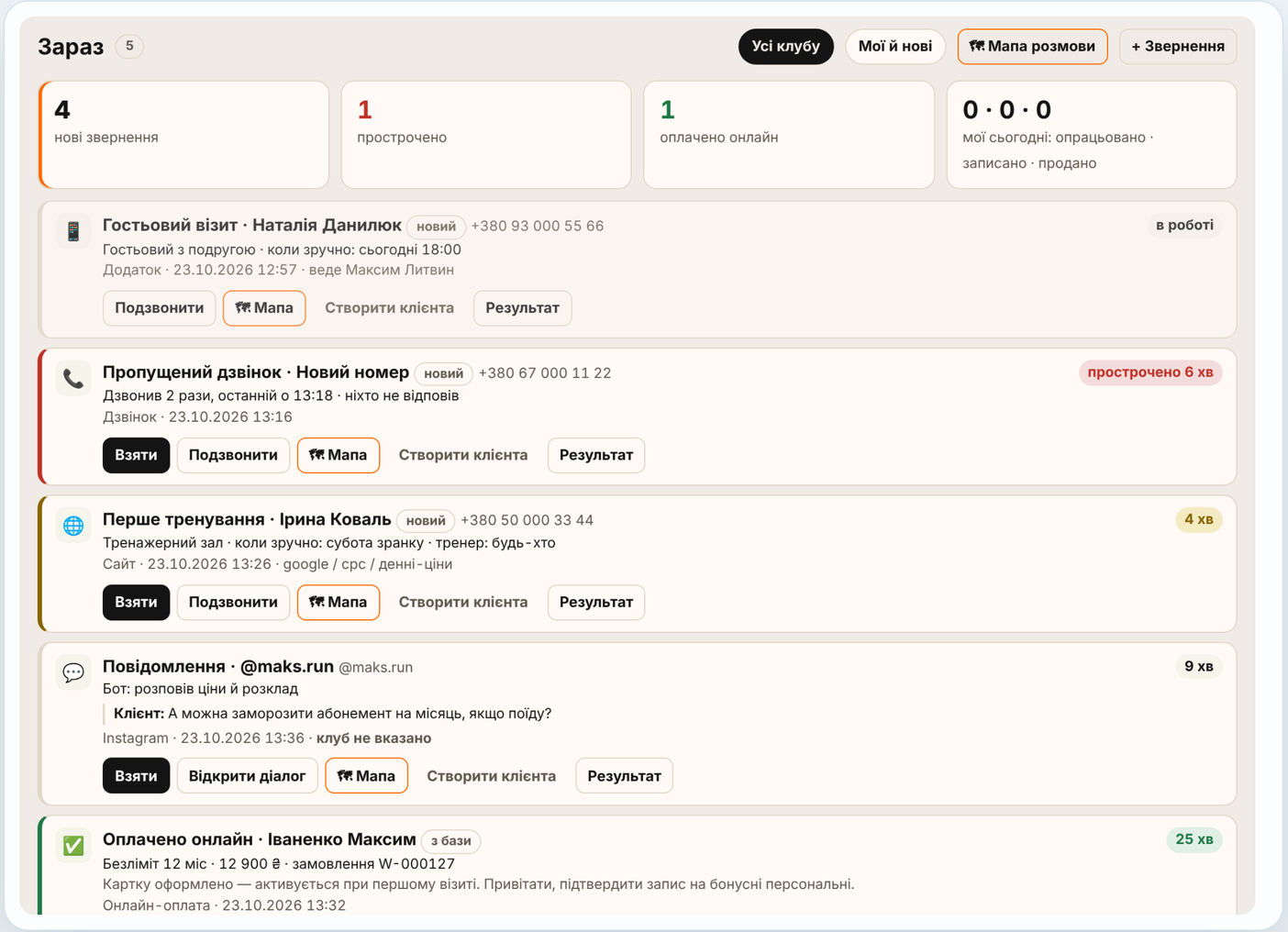
Owner

Morning report in Telegram, discount and cash control, access rights for everyone.

MANAGER'S SCREEN

“Now”: everything that needs a reaction

1. **All channels in one queue:** website, app, Instagram, missed calls, online payments.
2. **Response timer:** amber — time is running out, red — overdue, the manager’s head already knows.
3. **“Take”:** the lead is assigned to a manager, so two people never call the same client.
4. **Where it came from:** channel, ad and campaign — you see which ads bring people in.



PROCESS

A lead’s path: from a website click to a visit

01

Request

Website form, Instagram, app or a missed call

02

Queue

Branch managers see it instantly and get a push in Telegram

03

Conversation

A manager takes the lead and calls using the call map

04

Result

“Booked for 6 pm”, “call back Monday” or a refusal with a reason

05

Front desk

Sees the person in “Expected today” and greets them by name

06

Sale

Visit, membership — and all of it in the owner’s morning report

Response rules live in the system, not in people’s heads

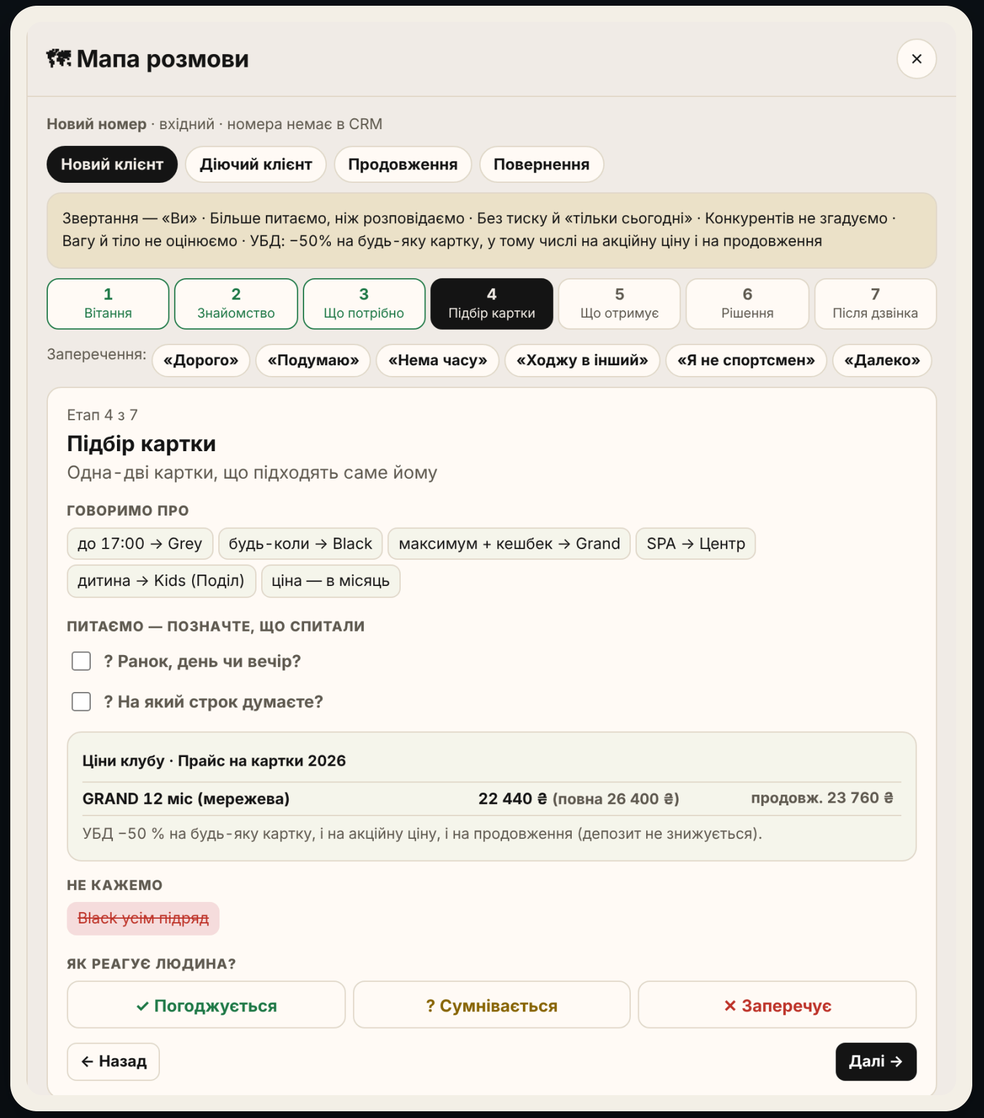
Message — 10 min · request and missed call — 15 min · online payment — 30 min, during sales hours. Another 15 min overdue — the manager’s head is notified. Called back and talked — the missed call closes by itself.

CALL MAP

A script that isn’t stuck in a drawer — it opens during the call

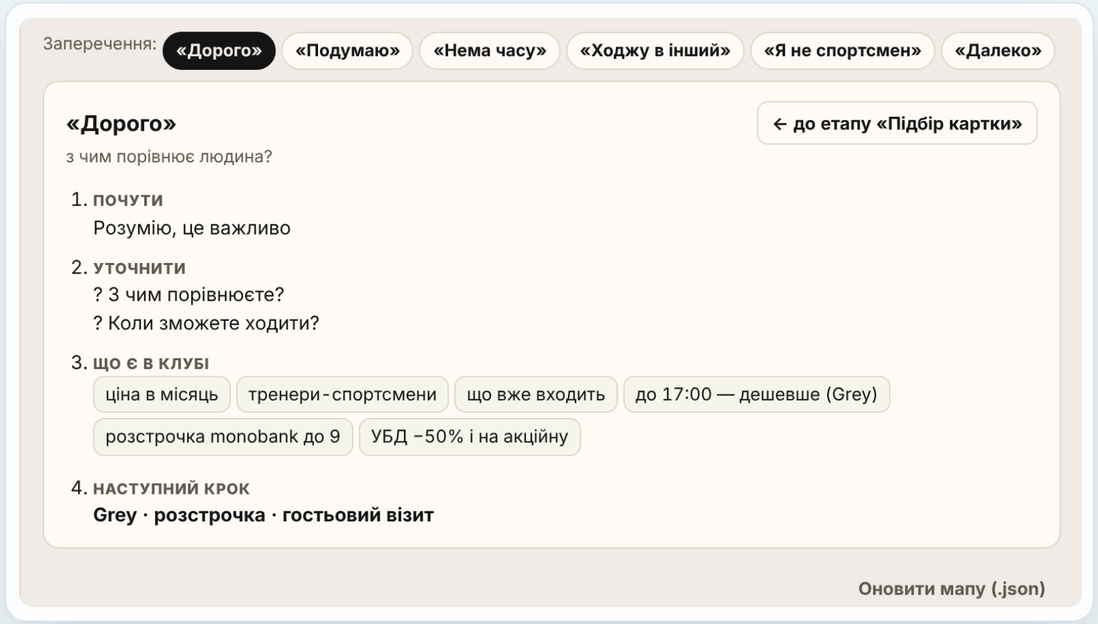
1. **Call stages** — from greeting to booking a visit. Completed ones turn green.
2. **What to ask** — with checkboxes; **what not to say** — crossed out in red.
3. **Current prices** of the branch come from the price list — no mix-ups with promotions.
4. **Client’s reaction**: agrees — next; doubts or objects — a ready answer.

We write the maps together with the head of sales from real calls and update them with one file — printed and on-screen versions never drift apart.



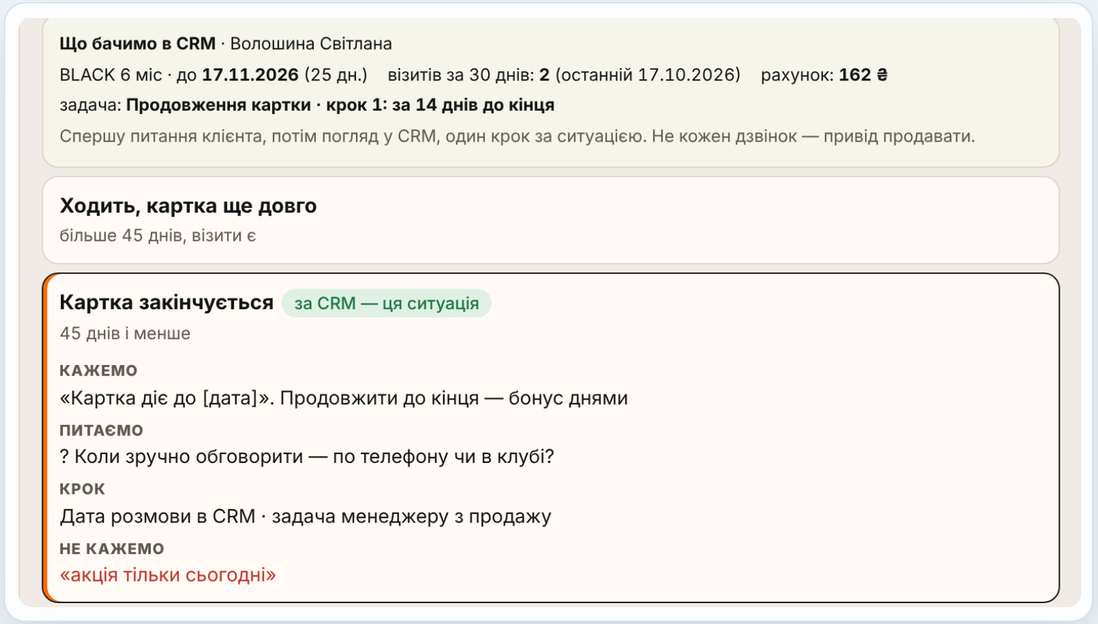
CALL MAP

Prompts for this person and this objection



“Too expensive”, “I’ll think about it”, “No time” — in one click

Four steps: hear → clarify → what we offer → next step. No arguing, no pressure.



A regular client calls — the system already knows the situation

Membership, visits, account balance, open task — and a ready next step: “card ending”, “disappeared”, “money will expire”.

TELEPHONY + AI

Every call — transcribed and scored

69

calls in one day transcribed and scored against a checklist — without listening to anything by hand

3.8/10

average score of renewal calls — now you see at which step managers “let the client go”

An honest picture

“There was a call — no result logged”, “marked as called — but no call”, missed inbound calls → tasks. Recording — one click.

Every morning the head of sales gets conclusions and recommendations on yesterday’s calls — with refusal reasons and risks.

Figures from a real deployment in a network of three clubs, without names or personal data.

CLIENT RETENTION

Renewal is decided a month before the last day, not on it

8%

renew among those who didn’t come once in the last 30 days of their membership

70%

renew among those who came 10 or more times

27%

of those who left buy again later — they are worth working with

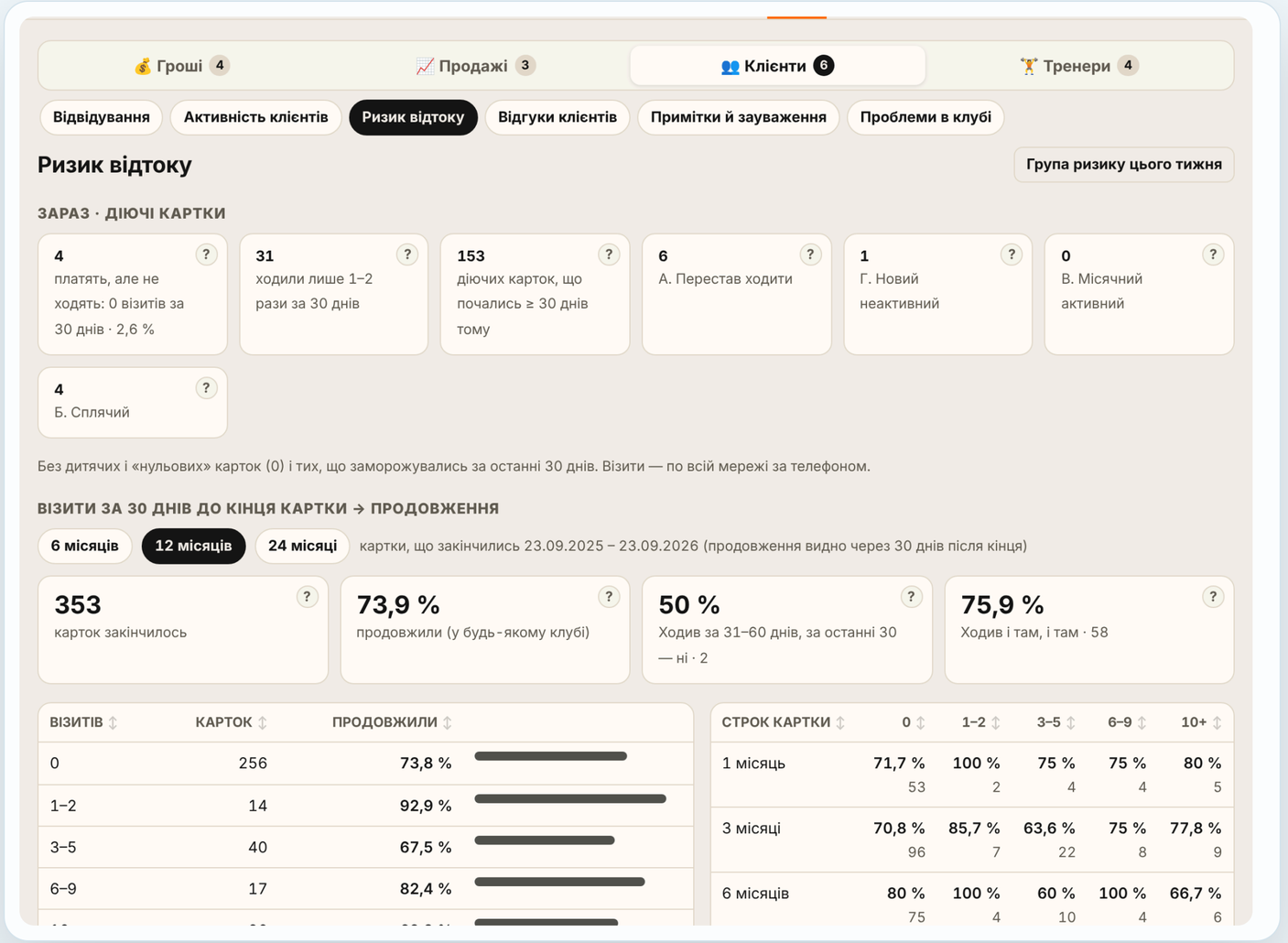
So the system schedules a call as soon as a person disappears: at-risk group, renewal calendar, win-back after 30 and 90 days.

Client’s legacy system data: memberships from spring 2024 to September 2026.

CHURN RISK

See who will leave — before they leave

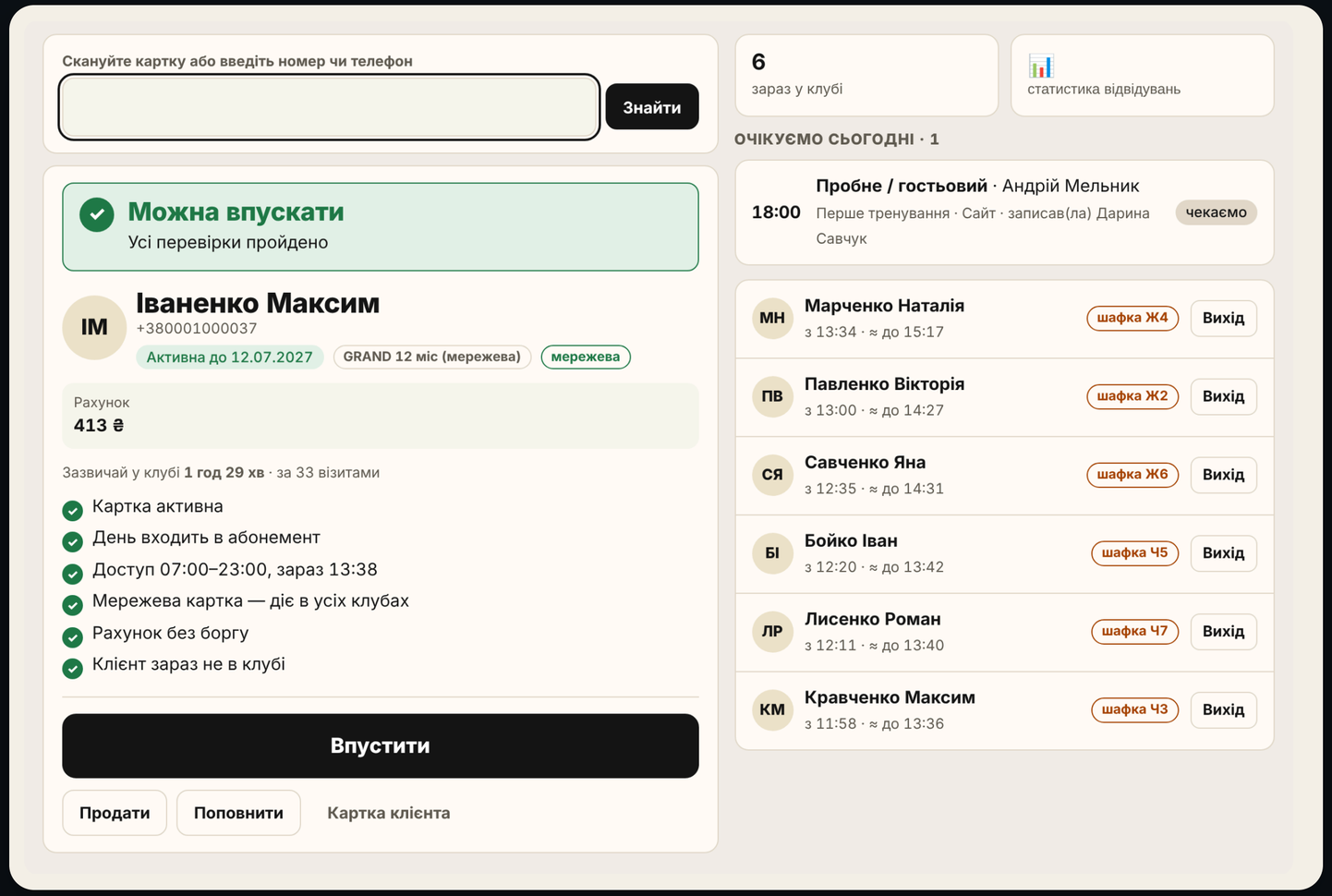
1. **Segments:** stopped coming, “sleeping”, a newcomer rarely coming, a monthly card — time to offer a longer one.
2. **Visits → renewal:** the table shows how attendance drives the decision to renew.
3. **In one click** — calls to the at-risk group go to managers’ calendars, with a hint on what to say.



FRONT DESK

Card scan — an answer in a second

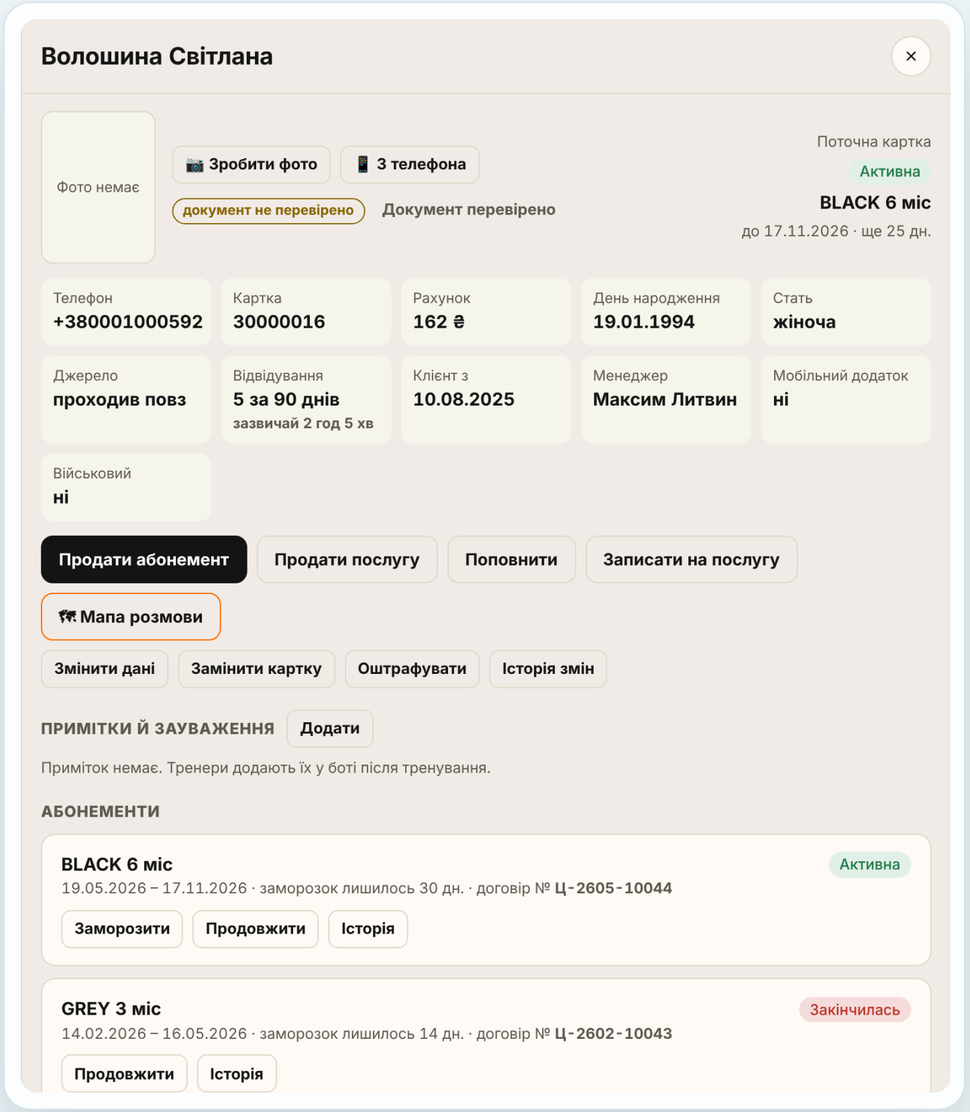
1. **“Let in” or “not”** — in large type, with the reason: membership, access hours, debt.
2. **Client’s habit:** “usually stays 1 h 29 min” — a forgotten locker is easy to spot.
3. **“Expected today”** — who is booked for a trial, guest visit or personal session.
4. **Who is in the club now**, which locker, when they’ll leave — and “Check-out” in one click.



CLIENT PROFILE

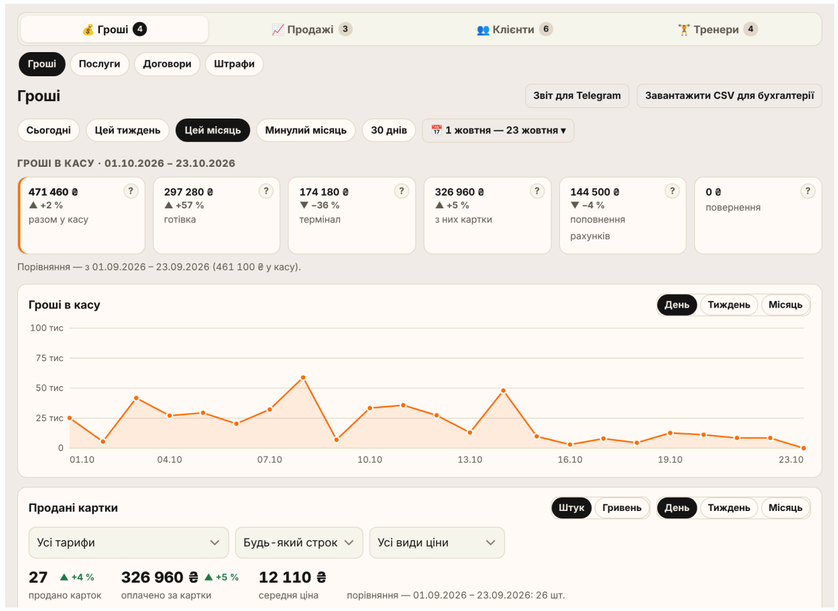
A person’s whole history on one screen

1. **Who it is:** phone, where they came from, their manager, photo and verified ID.
2. **Money and visits:** balance, how often they come, all memberships with contracts and change history.
3. **Actions in one row:** sell, top up, book, freeze — and the call map.
4. **Team notes**: the trainer wrote after a session — the manager sees it before calling.



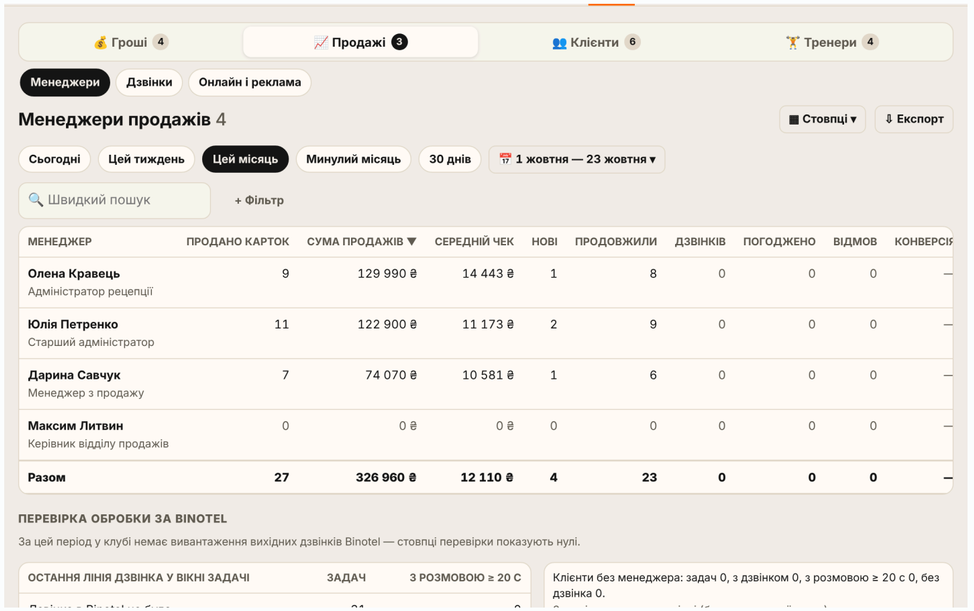
REPORTS

Numbers every day, not at month end



Money and sales

Cash with comparison, daily chart, cards sold by plan; CSV for accounting.



Managers

Sales, ticket, renewals, calls — and a check against telephony: “marked, but there was no call”.

More reports: visits, client activity, churn risk, feedback, trainers and personal sessions, online sales and ads. Next to every number — a “?” explaining how it’s calculated.

FOR THE OWNER

Your business in Telegram every morning at 8:00

- Sales, visits, leads and managers’ response time — for every branch
- A discount above the limit — instant alert with the reason and who approved it
- Suspicious sales and payment errors — the system finds them itself
- A log of every action and access rights for each employee
- Reports on managers, specialists and churn — with an explanation for every number

Morning report · example

Branch 1 · Fri, 23.10

💳 Sales: 7 memberships · ₴84,200

🚪 Visits: 412

📥 Leads: 18 · response 6 min

🏋️ Personal sessions: 31

⚠️ Risk: 12 clients haven’t come for 14+ days

Figures in the example are fictional

FRONT DESK AND SERVICE

Fast at the door, paperless inside

Scan — and an answer

“Let in” or “not” with the reason, client photo, debt, freeze — in a second.

Expected today

Who is booked for a trial, guest visit, personal session; whose online-paid card to hand over.

Specialists in Telegram

A trainer, doctor or stylist gets the booking and confirms the service on the phone — no paper.

Online payment

Website, app or bot: pay for a membership or a service pack — it’s ready and starts on the first visit.

Client bot

Guest booking via QR, “my account”: membership, balance, reminders.

Feedback and notes

Rating after a call; a client’s complaint → a task with an owner and a deadline.

FIRST DEPLOYMENT

What already works in a three-branch network

3

branches in one system; the old program syncs nightly — migration without stopping work

65%

of renewal refusals were logged without a reason — now a call can’t be closed without one

90+

updates based on feedback from the owner and the team — the system grows with your processes

500+

automated checks before every update — money and memberships are calculated without errors

A network of sports clubs, 2026. No names or personal data.

HOW WE WORK

Processes first, then code

01

Audit

Interviews and surveys with the team, analysis of calls and legacy data.

02

First version

Built for your roles, prices and rules; data moves over without stopping work.

03

Daily improvements

Team feedback today — an update within days, with a “What’s new” note.

04

Decisions from data

Reports and analytics that show where the business loses money and what to do about it.

We connect what you already have:

IP telephony · online payment · Telegram bots · website and mobile app · Instagram · legacy accounting software

PapiCreate

Tell us about your business — we'll find what to improve

We'll show where your business loses clients and money, and what is worth automating first.

Live demo

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