Case studies · Lukas Teissl CRM

Less on your mind. More under control.

CRM, reminders and tailored automation

Deadlines, payments, domains and everyday obligations take up mental space. My own daily work led me to build a CRM that helps me keep an overview and reminds me about outstanding payments.

My own development, used in everyday life.



A calm starting point for a busy day. · Image date 12 Nov 2026

Lukas Günther Teissl

Project	Lukas Teissl CRM
Project context	Business organisation and personal routines
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CRM · Automation · Deadlines and routines · Custom software

A personal solution for a busy working day.

This story began with my own lists. I wanted to stop carrying deadlines, ongoing obligations and recurring tasks around in my head. So I developed a workspace that fits the way I work.

Your mind is for ideas. Your system is for keeping track.

From lists that need attention to a clear overview.

Excel helped me record information. As the number of different due dates grew, repeatedly checking and keeping track became a burden. The lists existed, but I still had to reconstruct the overview myself.

Before: repeatedly checking

I recorded many details in Excel. Which payment is coming up, which domain needs attention, which deadline must stay in view? Keeping track meant constant mental effort for me.

Now: a focused view of open items

I bring these matters together in the CRM. Recurring obligations have a place, and payments have defined reminders. I can see what is still open and decide on the next step.

Six areas I no longer keep only in my head.

These are six areas I now organise in my CRM. They show how my own use connects business obligations with everyday personal life.

Recurring expenses

More than 60 expense items with monthly or annual due dates come together in my overview. I can review upcoming payments and ongoing costs deliberately.

Domains

More than 60 domains come with different renewal and payment dates. The CRM helps me keep those dates together and plan the next steps.

SIM cards and phone numbers

Several SIM cards, phone numbers and balances need to stay active. Validity dates, necessary top-ups and associated tasks have a clear place.

Bookkeeping client deadlines

My bookkeeping clients' deadlines and recurring obligations become visible in context. I can review open items and prioritise their handling.

Personal to-dos

My weekly personal tasks belong in the overview too. They stay in view, even when several things are happening at work.

Recurring routines

Regular tasks and checks are recorded in an organised way. That helps me fit them into my day and deliberately keep track of their completion.

Reminders until the payment is confirmed.

My email reminders for payments follow a fixed sequence. I deliberately record a payment as paid; that confirmation ends the reminder sequence for that payment.

01 **3 days before the due date**

The first reminder gives me time to plan the upcoming payment.

02 **1 day before the due date**

The next reminder brings the approaching date back to my attention.

03 **On the due date**

Another reminder brings any still outstanding payment to my attention that day.

04 **Daily afterwards**

Open payments stay in view: I receive a reminder every day from the due date.

Your daily work shapes the system.

My solution grew out of my own processes. For your business, we start with your recurring tasks, responsibilities and exceptions.

We look at what your existing system already handles well, which information is missing and where a tailored addition would help. Fields, reminders, approvals and possible integrations are agreed to suit the project. You do not have to adopt my way of working.

Developed from firsthand experience.

I am the developer and a daily user of this CRM. The story describes my own requirements, my implementation and my personal experience of using it.

My contribution – Lukas Teissl

I designed and developed the CRM around my own requirements. Its work areas and reminder rules reflect my daily work. Using the system myself shows me directly which structure helps in everyday practice.

The main difference: less on my mind.

I have more room to think again. I can see more clearly what is still open, review ongoing costs and set priorities, instead of mentally going over the same items repeatedly.

For me, that leaves more attention for clients, new ideas and my personal life. This calmer overview is the most important benefit I experience in my own use.

What could become easier for you?

In an initial conversation, we look at one concrete recurring process and what is taking up unnecessary attention today.

In client projects, my target is to automate 80% of suitable routine tasks. This is a planning goal, not a measured success rate for this CRM or a guarantee for your project. We assess what is realistic and useful based on your processes.

You keep oversight of decisions, exceptions and the confirmations that need your attention.

What keeps repeating?

Which task demands your attention again every week?

What needs to stay in view?

Which deadlines or outstanding matters do you want to keep track of reliably?

What needs your decision?

Where should the system remind you, and where do you want to check or confirm deliberately?

Four questions before we talk.

01 **Where should we start?**

With one process that regularly needs your attention: a deadline, a recurring task or a list you keep checking. Together, we turn it into a clear starting point.

02 **Can I use my existing Excel lists?**

Your lists are a useful starting point. We review their structure, data quality and the information you will need in future. That gives us a basis for planning a suitable data migration.

03 **How would this fit my existing software?**

We first look at what your current tools already do well. Then we identify useful additions, integrations or custom functions, and which routine tasks are suitable for them.

04

What happens in the initial conversation?

You briefly describe your day-to-day work and what takes up unnecessary attention. We discuss the overview you want, the people involved and a useful next step. A short description in the enquiry form is enough to begin.

Images for the story

A quiet visual perspective on the themes of this story.



Connections beyond separate lists. · Image date 12 Nov 2026



Space for thoughts and new ideas. · Image date 12 Nov 2026

Sources and context

This account describes my own use. The public product page adds technical context.

Lukas Teissl CRM: public product description

The public product page describes the CRM’s work areas; source page in German. The quantities, reminder rules and personal account of the benefits come from my own use, as of 12 November 2026.

Which routine could become easier?

Tell me what you still piece together with lists or keep in your head. We can identify a useful starting point for your daily work.

Request an initial conversation

A short description in the enquiry form is enough to begin.

Visit the company website

Explore the technical implementation

The technical reference complements this personal account with the CRM’s work areas and implementation.