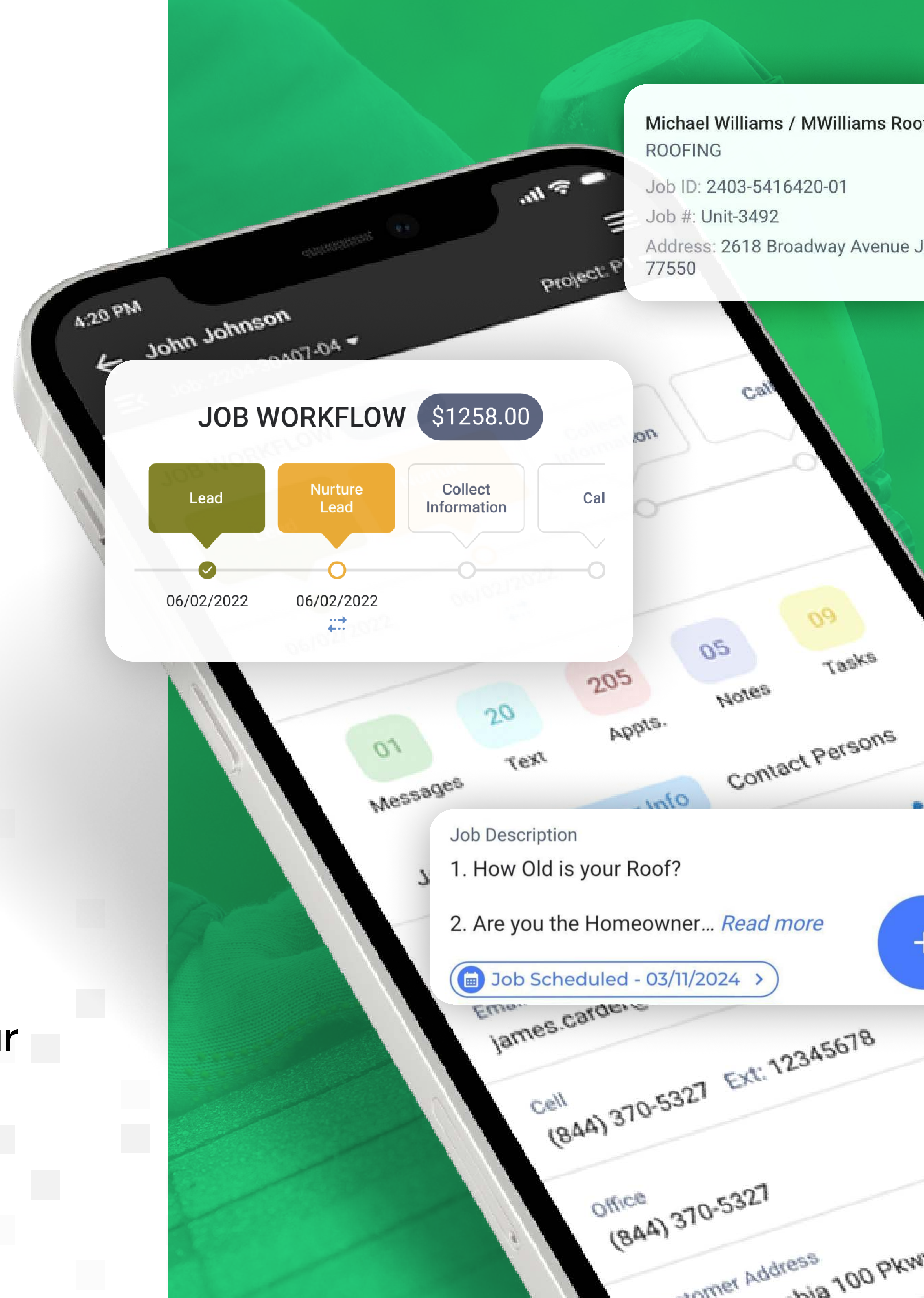




How to Choose the Best Roofing CRM For You

Tips to Pick the Best CRM for Your Roofing Business on the First Try





Navigating the lineup of roofing CRM solutions feels a bit like going into the football playoffs.

Everywhere you look, passionate CRM fans throw on their team colors and chant for their favorite platform, while booing the competitors. Each CRM, the market cries, has a unique indispensable feature quarterbacking their business, while others lack critical integrations.

With so much noise from the stands, it can be hard to pick the best CRM for your business the first time around.

That's why we wrote this playbook – to help you tune out the cheers and jeers from the stands and find the right CRM for your team to take your roofing business to the championships.



Opening Play: Understanding the CRM

Think of **Customer Relationship Management (CRM) software** as your roofing businesses quarterback. Of course, your CRM doesn't throw footballs. Instead, your CRM helps you coordinate the plays by keeping all your contacts, sales, projects and customers in one playbook. It's the star player that organizes everything, keeps track of what's going on in your business, and keeps your team on the same page.

But, if your CRM isn't a good fit, things can get messy quickly, and you may find yourself dropping the ball in more ways than one.



Game Plan: Why Your Roofing Team Needs a Tech Upgrade

Many teams still stick to old-school strategies in roofing, swearing by their paper contracts and Excel spreadsheets. But here's the play: drafting the right CRM software into your squad sets you up for a Lombardi-worthy advantage.

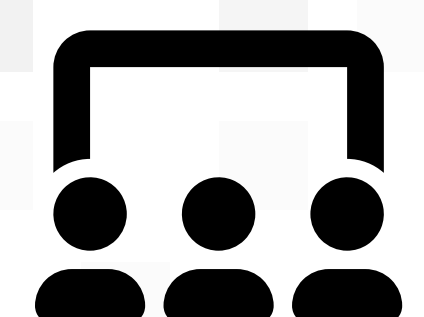
A great CRM will help you:



Quickly Follow Up on Leads



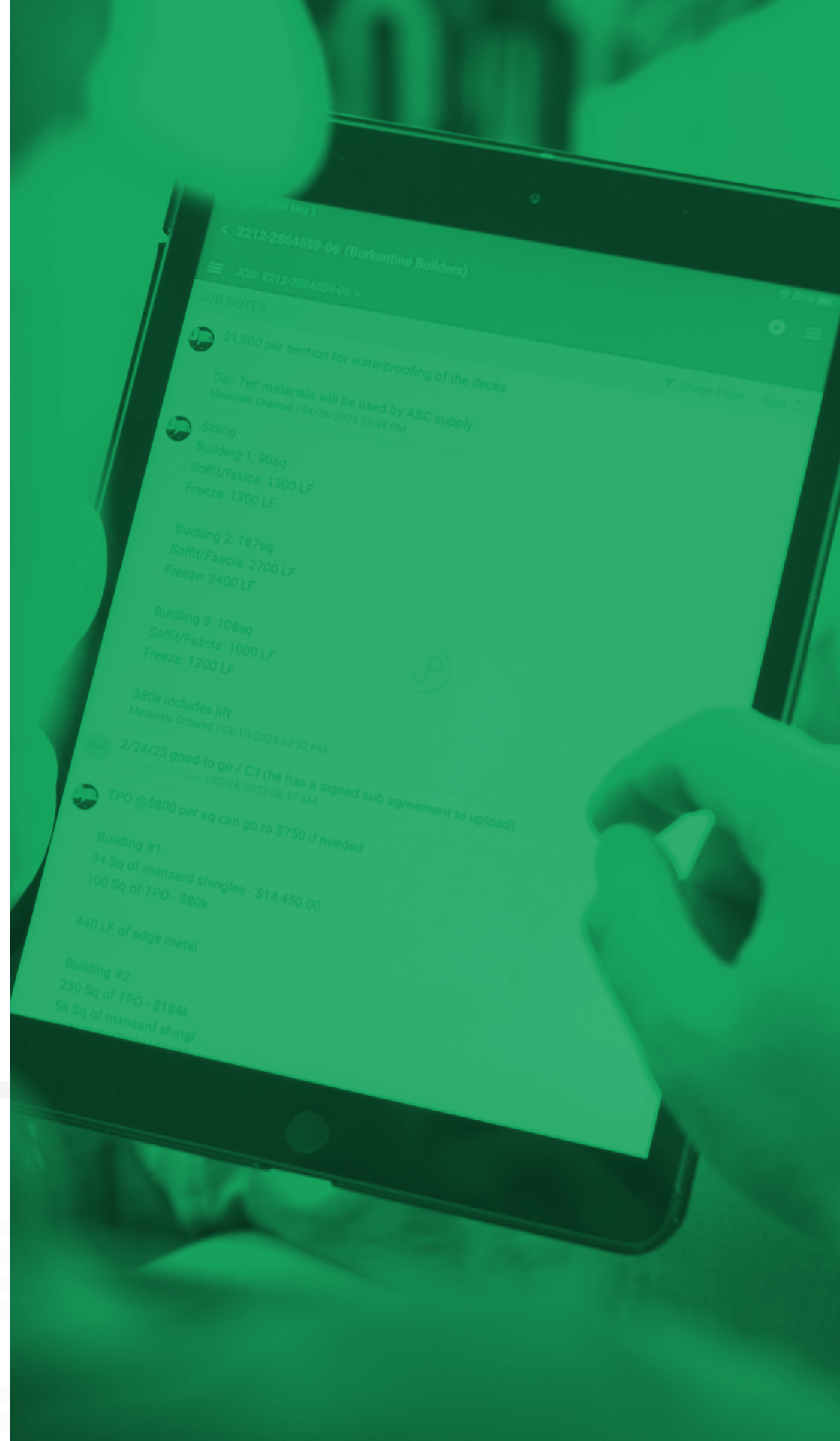
Create Digital Estimates & Contracts



Manage Field & Office Employees



Maintain Communication with Customers





Where Are You in Your Business?

Are you just starting to gain traction or are you looking to expand into new markets?

A one-to-two person team has very different needs than an established business with company divisions. The smaller contractor may just need a simple tool to help them organize jobs and manage leads, whereas the large business would need deeper support for sales, marketing, IT, and their home office.



What Goals Do You Have?

Some common goals contractors often have when looking to implement a CRM are:

- Improving the customer experience
- Increase speed-to-lead
- Create or improve project management workflow
- Close more deals
- Widen margins and increase revenue
- Retain talent and recruit strong employees



What's Your Overall Budget?

Taking price into consideration is a huge aspect and should not be overlooked.

The price of a CRM can range from free to thousands of dollars a month – often meaning you get what you pay for. When thinking about how much you can afford to invest in a CRM, keep the wise words of Leap's CEO Patrick Fingles in mind: "Software should be free," because you're getting so much value and business growth out of it, it pays for itself.

Drawing Up Your **Playbook**

Before you start thinking about purchasing CRM software, sit down and answer a few questions about your business and your goals.



Scouting Report:

What the **Right CRM** Should Bring to the Table

Before you go all-in on the draft, it pays to understand what potential CRMs can do for your business, and understand how they play. Here's a list of qualities to help you identify potential picks.

User Friendliness

The CRM shouldn't be too complicated for your team members to understand and use. Make sure it's intuitive, has a clean and simple UX, and easy-to-find shortcuts.

Lead Management

A good CRM will help you manage and track your leads, so your business pipeline is always running smoothly.

Scheduling

Balls get dropped when team members aren't sure where they're supposed to be. Make sure your CRM has intuitive scheduling for your team, from first appointments to jobs.

Customer Management

Keeping your customers updated and informed takes a lot of work, and the right CRM will make updating customers progress, and communications via text and email a breeze.

Mobile Compatability

A lot of the work in roofing teams happens in the field. Your CRM should be easy to access, use and update from mobile as well as desktop.

Customization

Each roofing business has its own workflows, and potential side projects or services that require customization. If your CRM is non-customizable and forces you to use its workflow, it's not a fit.

Pricing

Before you sign a contract, make sure you understand what the pricing structure of your CRM is, both now, and in a few years. This will help you understand if the CRM fits into your budget and growth rate in the long term.



Make Sure to Ask Around

Ask trusted colleagues which platform (and features) they prefer to use.

Pro tip: Friends who have recently purchased a platform are great resources because they've already done the work for you and it's fresh in their mind. If you don't know of anyone personally, use online forums like Facebook Groups or Reddit communities to look for recent conversations about CRMs.



Who Do Others Use?

Identifying which software is industry leading is important and should not be overlooked.

Analyzing who your competition uses is a great way to create a short list of CRMs relevant to your industry. If you can't tell if they're using a CRM by looking at their website, you can use a tool like BuiltWith.com to see what technology they have connected. BuiltWith will provide you with a list of software they use on their website, often including their CRM provider.



Which Integrations?

Being able to work with other software is important and can save you time and money.

If you already have some technology in place, make sure to check their list of integration partners to see who they recommend. For example, top integrations such as RoofHub, BeaconPro+ and AngiLeads recommend Leap to their customers. You don't want to select a CRM only to have it not work with any of your other tools.

Draft Pick: Start the Selection Process

Do some research and start to narrow down your prospective CRMs.



The Championship Playoffs

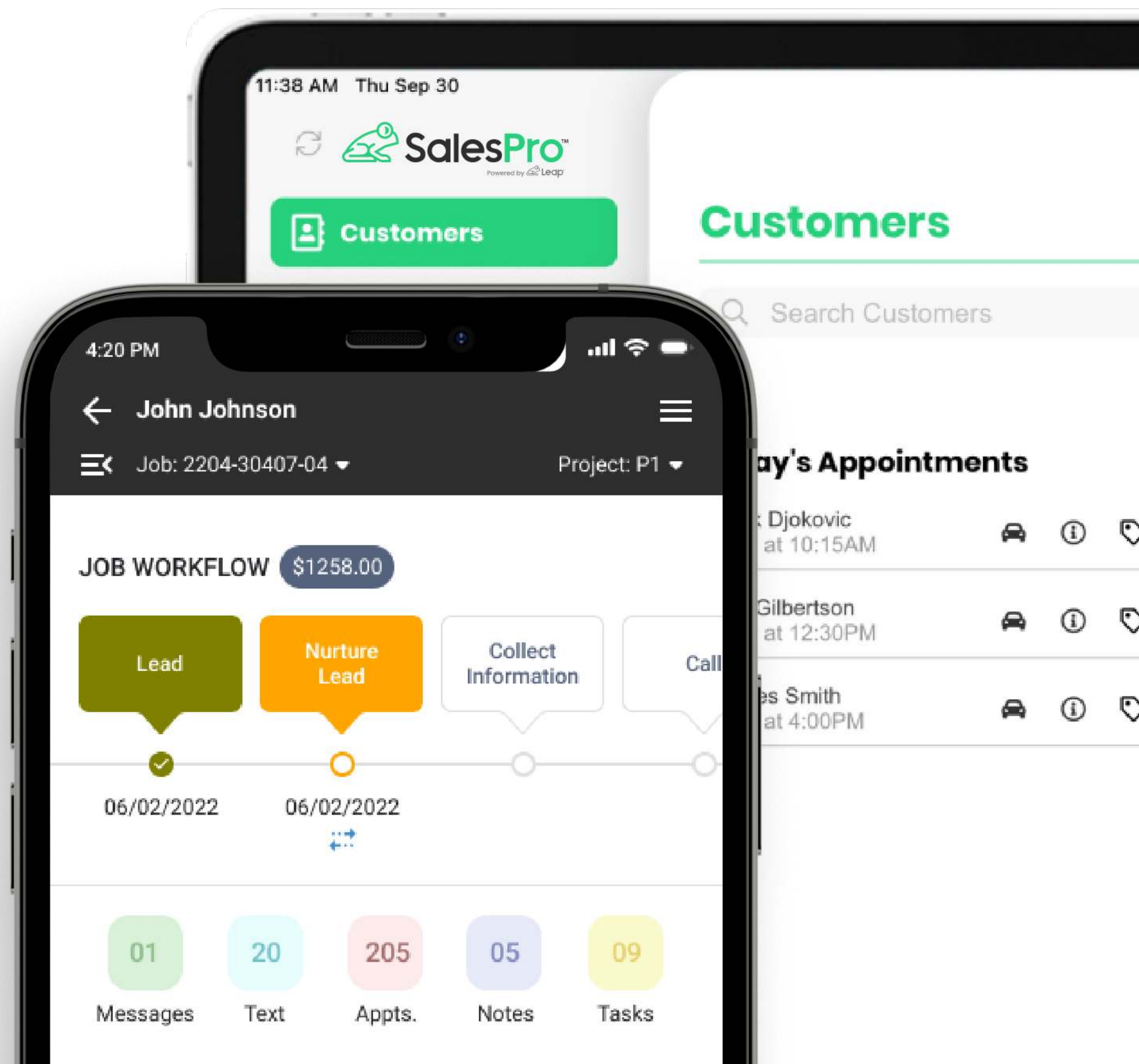
Curious to see how the Top CRM contenders face off against each other without spending hours researching? Here's a comparison chart of the most important features your roofing CRM can provide your team.

	Leap™	ACCULYNX	JobNimbus	BUILDERPrime	Buildertrend
Lead Management	Yes	Yes	Yes	Yes	Yes
Automated Follow-Up	Yes	Limited	Yes	Limited	Yes
Lead Workflows	Yes	Yes	Yes	Yes	Yes
Appointment Scheduling	Yes	Yes	Yes	Yes	Limited
Mobile App	Yes	Limited	Yes	No	Yes
Customer Portal	Yes	Additional Charge	No	Yes	Yes
Transparent Pricing	Yes, \$249/mo	No	No	Yes, \$79/mo	Yes, \$399/mo
Integrations	Yes	Limited	Limited	Limited	Very Limited
Customization	Yes	No	Yes	Yes	Yes



Jump in With the Leap Platform

Now that you know how to evaluate a CRM for your needs, you can take the “leap” into implementing a software. Leap provides CRM capabilities to help companies large and small grow and reach their goals.



Digital Estimates



Digital Documents



Ordering Integrations



Team & Production Calendar



Subcontractor Portal



Remote Payment Processing



In-App Signatures



Office & Location Management