

Choosing a CRM That Supports Growth: WHAT TO LOOK FOR

Your business's customer relationship management (CRM) system can be an effective way to organize lead and customer contact info — or it can be the tool that redefines your processes to generate more leads, close more sales and bring in more money to support your business goals. It all depends on which CRM you choose.

SO WHERE DO YOU START?

Run through the checklist below to see how your current CRM stacks up; you might be surprised by just how much more you can get done with an option better suited to your needs.



MARKETING & SALES

Does your CRM help you WIN MORE JOBS?

The tool you choose should:

- ☐ Automatically capture every lead from your website, Facebook and Google Ads so nothing falls through the cracks
- ☐ Instantly show you the ROI on your marketing dollars, telling you exactly which campaigns are generating leads
- ☐ Empower your team to send professional, signable proposals with photos
- ☐ Automatically follow up with unsold estimates to help you win more bids without lifting a finger
- ☐ Help you build a 5-star reputation by automatically requesting reviews from your happiest customers
- ☐ Allow your outside sales reps to quote, sell and collect payment entirely from their mobile device — even when they're offline



OPERATIONS & SERVICE

Does your CRM MAKE YOUR DAY-TO-DAY EASIER?

Your whole team wins when your CRM can:

- ☐ Automatically optimize your daily routes, cutting down on drive time and fuel costs for every technician
- ☐ Give you a live GPS map of your technicians' locations to quickly respond to emergency calls and provide accurate ETAs
- ☐ Send automated appointment reminders to customers via text and email to eliminate no-shows and manual effort
- ☐ Give your technicians all the information they need — service histories, notes, materials used, recommendations from last time — on a mobile app that works offline
- ☐ Allow you to drag-and-drop your schedule to easily accommodate last-minute changes without creating chaos



BILLING & PAYMENTS

Does your CRM help you GET PAID FASTER?

The right CRM keeps your cash flowing by:

- ☐ Allowing customers to pay their bill online with one click, right from the invoice email
- ☐ Automatically charging customers on recurring service plans via autopay to make your cash flow more predictable
- ☐ Enabling your technicians to securely collect payments in the field the moment a job is finished
- ☐ Allowing for easy export of general ledger data for accounting software (like QuickBooks) to eliminate hours of double entry and associated errors



BUSINESS MANAGEMENT & INSIGHT

Does your CRM give you the visibility you need to GROW YOUR BUSINESS?

Your CRM should deliver on easy-to-access, easy-to-understand data, including:

- ☐ A single dashboard where you can see the real-time health of your sales, operations and finances
- ☐ Which of your services are the most profitable, and which technicians are your top performers
- ☐ Key performance indicators (KPIs), like revenue per technician and customer acquisition cost, without the need to build complex spreadsheets
- ☐ Ownership of your customer data, ensuring you can easily take it with you and continue servicing customers smoothly if you switch platforms

If your CRM doesn't check the right boxes to support your team — both in the office and in the field — and help them drive sales and build lasting customer relationships, the bottom line is that it's not working hard enough for your business.

Ready to find a better fit to drive your business to the next level? The list above is more than just a list of ways the right CRM will help your business grow; it's also a list of all the CRM features you'll find in PestPac by WorkWave.

and see how PestPac's customer management tools give you a leg up on your competitors.

