

# 8

## Unique Features You Should Find in a Construction CRM.

Here is a complete guide to finding  
the best construction CRM.



## Feature One

# Job Information

This was an easy first feature. Unlike mainstream CRMs, construction CRMs need to track different information and use different terminology.

It's true, you can rebuild a mainstream CRM to be more functional for construction. However, this process typically takes months of customizations and training to make it effective. Not to mention, this commonly leads to more expenses for you and your company.

At a minimum, a construction CRM should track critical job information out of the box, such as:

- Job Scope & Job Specifications
- Bid Due Date/Time
- Bid Submitted Date/Time
- Job Site Location
- Project Documents (Photos, Designs, & Estimates)
- Job Start & End Dates
- Customer Details & Customer Location
- Building Owner
- Property Management Company
- Labor Requirements
- Assigned Project Manager & Estimator



## Feature Two

# Bid Tracking

Bid tracking is our second feature highlight. There are a lot of moving pieces during the bidding process. Without the proper tools, it's easy for communication errors to occur.

By using bid tracking tools, your sales teams, project managers, and estimators can collaborate on bid opportunities coming into the company. Additionally, these tools give your management team the ability to stay up-to-date on these bids and monitor bid activity.

Now when a bid opportunity comes into your company, your sales teams, estimators, and project managers receive an automatic alert. Additionally, they'll receive alerts when the bids are due and when critical tasks are completed, like an on-site inspection.

### **Are you a specialty contractor or subcontractor?**

Specialty contractors and subcontractors often submit multiple bids for the same job, but don't have a way to track all of the bids together under a single job. A good construction CRM allows specialty contractors to capture, track, and report against jobs with multiple bids to different GCs.

This is critical to understanding which jobs and bids are in the pipeline, why bids are being won, and why bids are being lost. This information should help you and your management team properly forecast sales and labor requirements.



## Feature Three

# Bid Scoring

As a contractor, you receive a lot of bid requests. Choosing which bids are likely to be awarded and which are most likely to be profitable can be a challenge.

A proper construction CRM will help you prioritize and score your bid opportunities. This is done by reviewing multiple variables, such as:

- Customer & Job History
- Available Labor
- Estimator or Project Manager Performance
- Customer Payment & Credit History



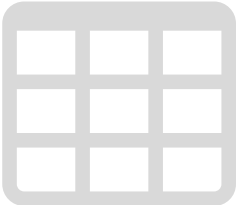
## Feature Four

# Job Communication

Being able to plan jobs and coordinate job resources is crucial for proper communication and collaboration for any construction company.

A construction CRM should allow you to forecast job resources for both active and proposed jobs. This immediately gives you the ability to plan both job and bid activity for your company.

Additionally, a construction CRM should secure your sales, customers, quotes, and job information in the cloud. This gives your team the ability to access this information from anywhere with any internet-friendly device. Additionally, your team can then update information instantly and keep communication and collaboration at an all-time high.



## Feature Five

# Quoting

Without the proper tools, job quoting and proposal building is time consuming. Not to mention, it can leave you and your team open to mistakes.

A construction CRM should streamline the quoting process by helping you select the items you need, specify the quality, adjust the costs, and adjust the pricing.

This functionality alone has the ability to save you hours each week. Additionally, it can help reduce any quoting errors from occurring in the first place.



## Feature Six

# Analytics & Reports

Okay, analytics and reports aren't specific to just construction CRMs. However, a construction CRM's analytics and reports should provide information and tools unique to contractors.

For example, a construction CRM should:

- Help you understand your bid and sales performance.
- Help you identify areas of improvement in bid and sales activity.
- Help you find hidden sales opportunities within existing customers.

Again, analytics and reports aren't unique to construction, but the information provided to you should be designed for your specific needs.



## Feature Seven

# Email Marketing

When taken at face value, email marketing isn't unique to a construction CRM. However, construction CRMs do include additional functionality to enhance workflows and automation.

For example, a construction company can grow their service division by tracking and following-up with building owners/property managers before, during, and after jobs are completed. The majority of this work is done using automated follow-up emails and alerts on your behalf.

Additionally, while using unique customer and job information stored in a construction CRM, you can send more targeted emails to effectively promote your company. For example, you may email all building owners and property managers to inform them you've added new services to your construction company.





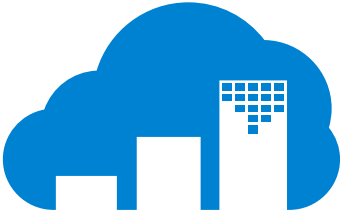
## Feature Eight

# Integrations

This is our last feature highlight, but certainly not the least important. A construction CRM will have unique integrations with other solutions in your industry.

For example, a construction CRM will synchronize job, customer, contact, and operational data with construction specific ERP or Job Cost accounting systems.

These integrations are crucial to saving time and minimizing data entry mistakes from your team. Additionally, it gives you an incredible ability to use customer and job history information to analyze future sales bid opportunities.



Good Job!

## Final Comments

A good construction CRM is built specifically for you. Designed and developed from the ground up to make your life easier.

As the construction industry continues to grow, utilizing the correct CRM will help you stay one step ahead of your competition. If you're a construction company not using a construction specific CRM, yes, the grass really is greener on the other side.

If you have any additional questions or need any additional explanations, please contact our team for assistance, we're here to help!

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