

Best CRM for Small to Mid-Size Water Damage Restoration Companies



Looking for a better way to manage and grow your small to mid-sized restoration marketing and sales? Customer relationship management (CRM) software can make a huge difference. There is no doubt that for customer-facing businesses, having CRM software is a must.

Unfortunately, it's easy to succumb to 'paralysis by analysis' when faced with so many options (there are literally hundreds of CRMs). With all the advantages CRM offers though, not choosing one is to be left behind.

From robust solutions, to simple ones designed for very small contractors or a free version, there's a CRM software choice for everyone. Over the years, the More Floods staff has researched and reviewed a large number of CRM software products and recently whittled it down to what we believe are the best for small and mid-sized restoration businesses.

Six things you MUST READ before you read on (or the rest will not make any sense!):

- 1. This is just our opinions – no endorsements here.** Before even deciding to write this article, we hesitated, because we know first-hand, and through many interactions with our own More Floods member companies, how difficult and sometimes even divisive, the 'CRM discussion' can be. Many, including us, have spent a lot of time, money and energy in trying to figure out which CRM is the 'right' CRM. *The bottom line is this – the 'right' CRM is the one that you will actually use. Period.* Our recommendation if you're in the market for a CRM system is to try a few out (most offer a free trial), see which one is most useful to you, and go with it.
- 2. This CRM analysis is geared only toward the small to mid-size restorer just getting started in CRM.** The vast majority of questions we receive about CRM come from small and mid-size restorers (fewer than 10-15 employees). We have talked with larger restorers about CRM, and while all of them indicated they had incorporated CRM in to their operations, their approach to CRM is a 'cradle-to-grave' one – meaning, they are using it to track everything, from the lead, to the job, to the invoicing, to the payment. This brings up an important point about our CRM analysis – our analysis is focused on how small to mid-size restorers can leverage CRM to optimize their marketing, not their project/job management and financial/accounting. While some of the CRMs we review and discuss are certainly capable of a 'cradle-to-grave' scenario, the fact is, the small-to-mid-size restorer cannot possibly spend the time, money and energy in their first foray in to CRM and 'eat the whole elephant'.
- 3. We are focusing on 'general' CRM systems, not industry-specific ones.** There are numerous industry-specific CRM's for the restoration industry. They tend to be a good fit for contractors who have larger teams, dedicated staff to use and manage them, and a desire to integrate project management in to their overall CRM. They also tend to be on the higher end price-wise. If you want to check some of them out, they include, [Restoration Manager](#), [ClientRunner](#), [ServiceMonster](#) and [JobNimbus](#) (to name a few). We also suggest you network with your peers to see if any of them are using these and what their experience is. You might also check out online forums that discuss these platforms, like [TruckMountForums](#) (just search 'CRM' on their forum), or if you're a More Floods Member, the [members-only Facebook forum](#).

4. **We are focused on 'lightweight' CRM systems.** CRM software has been helping sales people and teams manage their contacts and communication for three decades. However, most sales people use a fraction of the capabilities of their CRM and many still hate using it altogether. Additionally, with starting price points often north of \$50/user/month, affordability remains an issue particularly for small businesses.
5. **Cloud versus On-Premise.** This is the first criteria to decide on before moving on to deciding which CRM features and benefits are best for you. There are pros and cons to both. Check out this brief article before diving deeper - <http://crm-software-review.toptenreviews.com/cloud-vs-on-premise-crm-software-hosting.html>
6. **Social & CRM.** Social CRM is customer relationship management fostered by communication with customers through social networking sites, such as Twitter and Facebook. Many CRM software platforms incorporate functions and features designed to infuse social networking. That said, we did not make 'social CRM' part of our criteria – but – we strongly recommend you make 'social' part of your overall marketing mix, whether it's in your CRM software or not.

How We Chose The CRMs

The CRM software products we narrowed our list down to all have two things in common:



First, they all have offerings priced at less than \$25/user.



Second, they all place a very high priority on being easy to use so that people will actually use them.

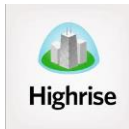
In total, we purposefully whittled our list down to 10 CRM software products. Most of them we have either used ourselves, or we have spoken with users and gathered their input.

Our Top 10 CRM List

Here is our list and a summary of what each company says they offer (taken from their own product descriptions).



[Base](#) — Base is all about using data to help your business make wiser, more informed sales decisions. It closely monitors your sales pipeline, sales rep activities, goals and quotas to make sure your team is productive and succeeding.



[Highrise](#) — Focuses on helping you manage three key areas of your business: contacts, tasks and communications. You can maintain and share contacts with your team, create tasks and set reminders, and keep track of emails, notes and other forms of correspondence.



[Insightly](#) — Insightly is a simple, scalable solution that grows with your business. It offers both basic and advanced capabilities, so you can start with a free or super-affordable standard plan, then upgrade as your business expands.



[Less Annoying CRM](#) - Focused on removing features that small businesses don't need, taking out buzzwords and just staying simple. For instance, all of a lead's information—from phone number to contact notes—can be found on one simple page.



[Nimble](#) —Automatically syncs all types of contact data across multiple channels, including social media. It uses "social listening" to filter contacts and prospects on sites like Twitter, Facebook, Google+ and LinkedIn to help you find and close high-value opportunities. The software also syncs emails, direct messages and @mentions.



[Pipedrive](#) —Simple and easy to use. It's also a highly visual platform, making it easy to quickly navigate the dashboard and get the data you need at a glance. There is also no training required, so you can get started right away.



[PipelineDeals](#) — What makes it stand out from other CRM software is that it goes the extra mile. For instance, it can send snapshots of your pipeline to your inbox every morning so you know exactly how your business is doing before you even open the software.



[Pipeliner](#) — Presents all your data in an intuitive, visual way, so you don't have to go through multiple steps to get the data you need. For instance, when you go to the Pipeline section of the software, you'll be greeted with charts showing you who is in which stage of your pipeline. Pipeliner also offers an all-inclusive pricing model, so you get all the features for just one monthly price. Note: This is the one exception on our short list as far as price goes – they are \$35/month per user.



[TeamWox](#) — A more advanced CRM software, more of an enterprise management system, TeamWox brings big business tools to small businesses. In addition to CRM, it also helps you manage teams, tasks, service desks and other areas of your business. But if you're looking for a ready-to-use, cloud-based solution, look elsewhere — you'll need to download TeamWox, then install it in your own systems. TeamWox is also on the pricy side. It's free for up to five users, but it will set you back several hundred dollars if you need more than that.



[Zoho CRM](#) — Packed with features, despite its free price tag. Unlike other free CRM software, Zoho CRM offers a ton of premium capabilities and lets you add up to 10 users at no extra cost.

Honorable Mention



[ACT!](#) - an 'old-timer' in CRM years. It excels mostly with small user groups. ACT! is primarily an on-premise application with cloud-based options. We use it at More Floods. It is not as easy to use as the others on our list, requiring more set-up time and ongoing maintenance, but it is the workhorse of the CRM world, so worth at least a look during your CRM search.

A Final Word

This is our best attempt to 'boil the ocean' of the hundreds of CRMs available and zero in on the ones we think best fit the small to mid-size restoration contractor. Again, affordability, ease-of-use and designed to improve sales and marketing are the criteria by which we judged. If none of these fit your needs, here's a place you can start and do your own research:

<http://www.capterra.com/customer-relationship-management-software/>

Best of luck in your CRM efforts, and most importantly, in growing your restoration business!

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