

8 Questions to Ask When Choosing a CRM Provider

Simplify quoting, scheduling, and service with a CRM designed to deliver everything you need—nothing you don't.



Roofing is a rewarding job, but the work isn't always simple. You've got a whole lot on your plate—crews, timelines, inspections, and customer calls. A few hand-scribbled notes and your memory might not be enough to stay on top of it all. A customer relationship management (CRM) platform can organize your workflow. It can empower your team to deliver higher-quality, more personalized service too. But it can only give you these benefits if the features align with how you run your business.

When researching CRMs, ask these eight questions. That way, you can find a provider that supports the way you quote, schedule, and deliver work.

1. Will the roofing CRM grow with your business?

Your CRM should support your business at every stage, whether you're a two-person team or scaling fast. You shouldn't have to switch tools just to add users or manage more jobs. Changing mid-growth can cost you time, data, and momentum.

Look for a CRM that supports multiple users, evolving workflows, and bigger pipelines without hidden fees or complexity. As your crew takes on more work, your tools should make scaling smoother, not harder.

2. Does the CRM integrate with your existing tools?

Integration means your CRM connects to other systems you already use. This includes things like accounting software, calendars, and email. Without those connections, you'll end up entering the same data more than once. **Find out which systems the CRM integrates with out of the box.** Some providers rely on third-party connectors, which can break or cause delays. You want fast, reliable connections that don't require extra steps.

3. Does the platform enable self-service?

Self-service portals allow your customers to access their job information on their own. They don't need to call your office. They can revisit estimates, approve work, and track job progress all on their own time. Today's customers expect this level of transparency and control. They demand a level of responsiveness that may not be realistic for teams on the smaller side. **With self-service, your customers are happy, and your team isn't held back.**

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4. Is the CRM accessible on mobile?

Roofers spend their days out and about, not at a desk. You and your team need easy access to your CRM while on the go. Otherwise, you could miss important updates, which leads to mistakes, unhappy customers, and bad reviews. **With a mobile-friendly CRM, you can read records and upload photos and log updates. You can leverage past customer information and preferences to personalize your service approach.** So, ask how the platform functions on mobile and whether there's a dedicated app.

5. Will my customer data be stored securely?

A CRM is filled with private data. It stores things like customer addresses and contracts. If that data is exposed, your business's integrity is at risk. Ask the CRM provider how they protect sensitive information. **Features to look for include encryption and robust user permissions.** These protect you and your reputation from internal errors and malicious external attacks.

6. What kind of reporting does the CRM offer?

Reliable reporting supports daily decisions. You can track estimates and approvals, compare lead sources, or flag missed follow-ups before they cost you a job. But not all reports are useful. Raw data isn't enough if you need to scan five spreadsheets to piece together the puzzle. **Look for reports that connect to your real workflow, like response times and close rates. Ask how reports are structured, too, and how often they update.** If you can filter by location or team member, you'll find patterns sooner and can adjust before issues get worse.

7. What type of training and support is included?

Your CRM only works if your team uses it. If they don't know how to log job notes or update a record, you'll miss out on features you've already paid for. Find out about the support options that come with your plan. **Some promising signs include: live sessions, email or chat support with real people, step-by-step video tutorials, access to role-based guides.** Quality training makes new hires faster to onboard. Ongoing support keeps your team moving when they run into trouble or need to learn a new feature.

8. Is this CRM trusted by roofing pros?

Roofing work isn't built around desks. Crews move from job to job, and conditions change by the hour. A CRM made for office teams or general contractors often misses those realities. You end up with tools you don't need and gaps where you need support.

Ask whether roofing contractors use the platform now. Look for examples from companies like yours—small to mid-size teams working residential or insurance-driven jobs. Pay close attention to feedback about job tracking, estimate follow-ups, and mobile use. What others say about everyday use will tell you how well the CRM supports fieldwork.

RoofSnap + CRM Integrations

RoofSnap integrates with leading CRMs to keep your jobs, leads, and customer data in sync. Learn more about how RoofSnap connects with CRM providers and give your team the tools they need to close more jobs faster.

Explore CRM Integrations