

Landscaping CRM Buyer's Checklist

HOW TO USE

Pick 2–3 CRMs you're considering. Work through each section and check off every feature or criterion the CRM meets.

1 Before You Start: Know What You Actually Need

Don't buy features you'll never use. Map your real problems before you look at a single demo.

- | | |
|--|---|
| <input type="checkbox"/> List your top 3 sales frustrations
<i>e.g. losing bids, missing follow-ups</i> | <input type="checkbox"/> List tools you already use
<i>e.g. QuickBooks, Gmail, scheduling apps</i> |
| <input type="checkbox"/> Know how many people will use the CRM | <input type="checkbox"/> Confirm if your team will adopt new software |
| <input type="checkbox"/> Set a monthly budget per user | <input type="checkbox"/> Research what features you need |
| <input type="checkbox"/> Decide if you need mobile CRM access in the field | <input type="checkbox"/> Ask your crew what slows them down most |

2 Must-Have Features for Landscaping Businesses

These are non-negotiables. If a CRM can't do these, cross it off your list.

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|---|---|
| <input type="checkbox"/> Lead capture and contact management | <input type="checkbox"/> Email integration
<i>Gmail or Outlook sync</i> |
| <input type="checkbox"/> Bid and estimate tracking per customer | <input type="checkbox"/> Invoicing or payment tracking |
| <input type="checkbox"/> Automated follow-up reminders
<i>So no lead goes cold after a quote</i> | <input type="checkbox"/> Full customer communication history
<i>Calls, emails, visits in one place</i> |
| <input type="checkbox"/> Job or project status tracking | <input type="checkbox"/> Won/lost bid reporting |
| <input type="checkbox"/> Mobile app that works without WiFi | <input type="checkbox"/> Easy import of your existing contacts |

3 Nice-to-Have Features

These aren't dealbreakers, but they'll save time and help you grow.

- GPS tracking and route planning
- Crew scheduling and dispatching
- E-signature for contracts
Close deals without printing
- Drag-and-drop job calendar
- Email drip campaigns
Automated nurture sequences
- QuickBooks or accounting integration
- Equipment maintenance tracking
- Customer self-service portal

4 Questions to Ask Every CRM Vendor

Ask these before you sign anything. The answers reveal how they'll treat you as a customer.

- How long does setup actually take?
Can we be running within a week?
- Is training included in the price?
- Can I migrate my existing CRM contacts for free?
- What happens to my data if I cancel?
- Do you have landscaping customers I can speak to?
- Is there a contract or month-to-month?
- What's your average support response time?
- Can I customize the pipeline stages?
- Does pricing change as I add users?
- Is there a Zapier or API integration?

5 Red Flags Walk Away If You See These

These are warning signs. If any come up during a trial or sales call, think twice.

- Unclear pricing or hidden fees appear later
- No free trial or hands-on demo available
- Setup takes months and needs a paid consultant
- Your data is locked, you can't export if you leave
- No mobile app, or the mobile app barely works
- Poor reviews specifically about customer support
- No customisation for how your business works
- Doesn't integrate with QuickBooks or your tools

6 During Your Free Trial: What to Actually Test

Don't just click around. Run these real tasks to find out if the CRM fits your workflow.

- | | |
|---|--|
| <input type="checkbox"/> Add a new lead from scratch | <input type="checkbox"/> Import a spreadsheet of your contacts |
| <input type="checkbox"/> Create and send a sample estimate | <input type="checkbox"/> Generate a report on your open bids |
| <input type="checkbox"/> Set up an automated follow-up reminder | <input type="checkbox"/> Walk a full deal from lead to closed won |
| <input type="checkbox"/> Pull up a customer's full history | <input type="checkbox"/> Contact support and time the response
<i>See how fast and helpful they are</i> |
| <input type="checkbox"/> Test the mobile app on a real job site | <input type="checkbox"/> See if your team can figure it out without help |

THE GUT CHECK

After your trial: would your crew use this without being forced to?

If the answer is no, keep looking.

Ready to see how Pipeline CRM stacks up?

Pipeline CRM is the Best Landscaping CRM Software for Landscapers
Free 14-day trial · No credit card needed.

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