

CRM & LEAD MANAGEMENT GUIDE

How to choose, configure, and actually adopt the CRM that runs your business

WHO THIS IS FOR

Home service operators on their second or third CRM, the operators still running on a spreadsheet and a sticky note, and the operators paying for their field service software and using 10% of it.

WHAT YOU GET

A CRM selection framework by stage, a configuration audit so the numbers you see are the numbers that are real, a performance scorecard for every role in the business, a dispatcher operating model, and the four-stage adoption sequence that gets the team off "we do it this way" and into the system.

BASED ON

Field research across 200+ home service operators running CRM systems at scale.

WHAT THE CRM IS ACTUALLY FOR

Operators who have scaled past \$10M consistently call the CRM the largest catalyst of their business. One garage door operator running a 200+ employee operation says, on the record, that his company would not be half of what it is today without it. By the time he said that, they were on their fifth CRM. He is not selling you software. He is telling you what the move from spreadsheet to system is worth.

The function is plain. A CRM is the central data repository that tracks what ads are working, what content converts, what time of day ads perform best, and whether prospects are actually signing up or clicking to call. Without it, you are flying blind. With it, you can see the leak, name it, and fix it.

The financial frame makes it clearer: software is the best dollar-for-dollar investment available in operations and admin. A configured CRM replaces tasks that would otherwise need a \$5,000 to \$6,000 per month admin employee. That is your ROI math. You are not buying software. You are buying back the cost of an admin hire you were about to make.

THE FRAMEWORK FOR CHOOSING A CRM

The three-phase model: getting the work, doing the work, getting paid. Most operators believe they are lead-constrained and pour budget into ads. They are usually wrong. The leak is more often in "doing the work" and "getting paid," where the CRM does the heaviest lifting. Software is cheaper than headcount, and it does not call in sick.

The wrong way to build a CRM stack is to buy one tool per problem and try to integrate them. The live math makes this obvious: one field service platform at \$599, a separate email marketing tool for 10,000 contacts at \$435, and a job-site photo app at \$300. That is \$1,300+ per month for three subscriptions that still do not give you mass texting, dispatch depth, or video upsell capability. Compared to an all-in-one platform around \$500 per month, fragmentation is more expensive than consolidation.

Operators at scale describe the same problem repeatedly. One company ran about 45 software tools. Companies with 10 to 15 overlapping platforms create environments where information falls through the cracks, no single source of truth exists, and staff default to whichever tool they prefer. Manuals live in multiple places. Training collapses. The CRM cannot be the brain of the business if there are four other brains arguing with it.

PICKING BY STAGE

Stage 1 (under \$200K, owner is the labor). You probably do not need an enterprise-tier platform. Start with a tool that has a unified inbox, two-way SMS, online booking, and basic CRM. At this stage, pick something relatively inexpensive that integrates with Google Analytics, builds landing pages, includes a content tool, and offers free certification. You learn it as you grow into it.

Stage 2 (\$200K to \$800K, owner manages people). This is the consolidation stage. Move off whatever stack of three tools you assembled. Pick one platform that handles intake, dispatch, invoicing, two-way SMS, and post-job follow-up. Several mid-tier field service platforms fit here for many trades.

Stage 3 (\$800K+, owner architects systems). Enterprise-tier field service platforms become the benchmark for trades that fit (HVAC, plumbing, electrical, garage door, roofing). National operators covering 27 markets and 14 states run on them. So do most of the operators at scale who win the trade-press rankings. Enterprise platforms are expensive, and the curve is steep, but they are built on best practices from large operators. You do not bend them to your process. You bend your process to them.

THE "WE DO IT THIS WAY" OBJECTION

This is the most common reason CRM rollouts fail. The reframe is exact: "I ask why. Sometimes people are just afraid of change. But the software was designed by people who are using best practices in the industry."

The follow-up is the operator's test: "Is the process we want to put in place scalable for a thousand technicians? If it's not, what is it going to take to get there?" Apply this at 70 to 100 employees, before the cracks become fatal. The platform's defaults usually pass the thousand-tech test. Your legacy workflow usually does not.

One operator's payroll number is the proof. After roughly a year of resistance, they stopped customizing their field service platform to their legacy workflows and started using it as designed. Payroll processing dropped from 15 to 20 hours per week to under one hour per bi-weekly cycle. That is not a feature. That is a year of admin labor unlocked.

CONFIGURE THE DATA BEFORE YOU TRUST THE DATA

You cannot improve a number you cannot trust. One call-center audit found a company whose CRM showed a 30% booking rate. After correcting the CRM setup, the actual rate was 65%. The owner had been making capacity and marketing decisions on data that was off by half.

AI call analysis finds a different version of the same problem in the other direction. Companies that self-report 90%+ booking rates are usually running at 68 to 72% in reality. CSRs in field service platforms can mark calls "out of service area" or "parts only" to keep their numbers up. The CRM accepts what the human enters. AI dispositioning every call is the only way to ground the metric.

The prescription: the starting point for any operator who wants to improve capture metrics is not hiring a trainer. It is first getting data you can trust. That means programming your CRM correctly so booking rate, cancellation rate, and conversion rate are accurate. You cannot guarantee a move from 70% to 85% if you do not know what 70% actually means.

THE FIVE-METRIC CONVERSION CYCLE FOR YOUR CRM

The framework operators at scale use to measure CRM performance:

1. Booking rate
2. Conversion rate (booked-to-completed)
3. Average ticket
4. Cost per lead
5. Cancellation rate

The warning: booking rate alone is misleading. The real lead-capture picture is booking rate minus cancellation rate minus abandonment rate. One operator discovered CSR-level cancellation rates ranging from 3% to 17% inside the same call center. That spread changes which CSRs are actually generating revenue. The one with the higher booking rate is not always the one who closes more jobs.

The reinforcement at scale: never use blended close-rate averages. Track close rate by service type (maintenance vs. install), by customer type (commercial vs. residential), and by city, zip, and lead source, layered with seasonality. A blended average leads to pricing decisions based on bad data.

The revenue math justifies the work. At \$10M in revenue, a 1% improvement in booking rate is \$100,000. At \$315M, 1% is \$3.15M. The formula is the same: current revenue times the percentage improvement. Use your own revenue number. The math will tell you what to invest in.

THE PERFORMANCE SCORECARD FOR EVERY ROLE

The operating logic: "We rate everybody. Every CSR, every single person in the company pretty much has a number." This is what enabled one 200+ employee operation to send the entire call center home during COVID and keep productivity intact. The monitoring and incentive structure already existed. Remote did not break it.

Without role-level scorecards, you cannot delegate. The diagnostic is straightforward: not having an org chart is not neutral. It is actively keeping the business small. A good person cannot take over a role if the responsibilities have not been defined. They get thrown to the wolves and fail, and the owner stays trapped.

Build a scorecard per seat. Each one connects directly to the CRM. Each one tracks 3 to 5 numbers the person can actually control.

CSR SCORECARD

- Booking rate (largest weight)
- Cancellation rate (per CSR, not company average)
- Quality / error rate
- Attendance
- Service agreement attach rate

Best practice is two-week one-on-ones using the CSR's own recorded calls, plus a weekly group meeting where the team practices real scenarios and receives on-the-spot recognition for target behaviors. Data without accountability is useless. The cadence is what moves the metric.

DISPATCHER SCORECARD

The dispatcher's primary accountability is maximizing billable hours. Not scheduling for convenience. Billable hours are the only real inventory a service company has.

The dispatch rule at scale: the dispatcher sends highest-priority jobs (P1: broken springs, garage stuck open, car trapped) to the technicians with the lowest performance ranking number, meaning the best converter and customer-service score gets the highest-value lead. "You don't leave Tom Brady on the bench in the Super Bowl." Dispatch as the conversion lever, not the proximity calculator.

The principle: dispatch quality is "the best person for the best opportunity," not the nearest available technician. Top operators are codifying dispatch best practices into a Learning Management System inside their CRM so dispatch skill is no longer locked inside individual dispatchers' heads.

Dispatcher metrics:

- Billable hours per technician per day (the binding constraint)
- Tech-to-job match score (P1/P2/P3 routed correctly)
- On-time arrival rate
- Warehouse load time (one operator cut this from 1 hour 33 minutes to 23 minutes, returning over an hour of billable field time per tech per day)

TECHNICIAN SCORECARD

- Close rate
- Average ticket
- Five-star reviews per pay period
- Callback rate (low is good)
- Service agreement attach rate
- Referrals booked (top operators pay techs \$50 per referral booked through their personal business card)

OWNER / GM SCORECARD

The manual-depth principle: the thinnest manual belongs at the top of the org chart, because the manager's job is to keep everyone else performing. The owner scorecard is sparser: revenue, profit margin, cash on hand, employee retention, customer NPS. Five numbers, reported weekly.

THE CSR-DISPATCHER-TECH TRIANGLE

The inbound-to-completed-job loop is a triangle, not a chain. Three vertices, each one feeding the others. Break any one and the loop breaks.

The CSR sets expectations with the customer. The tech is coming. Here is what to expect. Here is what the price range looks like. The CSR's job is to set up the technician, build trust before the tech arrives so the tech can close at a higher rate and face less price resistance. This is explicitly the structural role of the CSR.

The dispatcher maximizes billable hours and relays all job context to the tech. Not just the address. The customer's name. The problem in the customer's own words. The age of the equipment. The age of the home. Anything the CSR pulled out of discovery. The tech walks in already briefed.

The technician closes the call back through the dispatcher. This is the step that breaks most often. If the tech promises a return visit and two weeks pass without follow-through, the customer is lost and the failure becomes a one-star review on every platform. One real example: an Arizona A/C visit where the promised callback never came. The dispatcher owns the close-the-call confirmation. It does not get to fall through the gaps.

The CRM is the surface this triangle runs on. Job notes, customer notes, tech-to-dispatcher messages, photo uploads, the warranty record. All of it in one place. Visible to every vertex of the triangle.

THE DISPATCHER LMS: CAPTURE THE SKILL BEFORE IT LEAVES

Top operators are building a Learning Management System inside their CRM that documents dispatch SOPs in video and written form. The purpose is not training new dispatchers. The purpose is removing single-point-of-failure dependence on the one experienced dispatcher who knows what nobody else does.

The diagnostic for this exact risk: in the \$800K to \$2M revenue band, businesses often have one key person who handles scheduling, customer service, and operations. When that person leaves, and they do, revenue drops 30 to 50% with no systems to catch the institutional knowledge. This is the single-point-of-failure trap.

Build the LMS now. Record the experienced dispatcher walking through:

- The intake-to-dispatch handoff (what they look for in the job notes)
- The tech-to-job match decision (why a particular tech got a particular call)
- The schedule reshuffle when an emergency hits
- The close-the-call protocol after the tech reports back
- The cancellation recovery path

The 80/20 rule for operations manuals: document the 80% of situations that happen day after day. Skip the rare 20%. Bloat is the enemy of usable manuals. The tech in a 120-degree attic has no business searching a tablet for what he should already know.

AUTOMATE THE POST-JOB TEXT AND THE REST FOLLOWS

The single highest-ROI automation in any home service CRM is the post-job text. One operator services 67,000 customers in a single year. The review volume is automated, not manual. The standard is non-negotiable: every completed job triggers a post-job text within an hour of completion.

Top operators layer the automation with a review management platform for review requests, automated handwritten cards (CNC machine, not human) for quote follow-up, yearly tune-up reminders, and "welcome to your new home" mailers triggered by pulling new home purchase data into the CRM. The CRM is the trigger engine. The customer journey runs on top of it.

For Stage 1 and Stage 2 operators, the first automation to build is the simplest:

- Post-job text fires within one hour
- Quote-not-accepted reminder fires at 48 hours
- Seasonal upsell text fires to the right segment at the right calendar trigger
- Lapsed-customer reactivation text fires at 30, 60, and 90 days

The GM rule, applied as a sequencing principle for your CRM: no GM is permitted to spend one dollar on paid marketing until every existing customer in the database has been contacted by text and email. The database converts at dramatically higher rates than cold traffic and costs nothing to reach.

The proof: one mass text to an existing customer database generated 52 to 53 estimates, 18 accepted one-time jobs, and 3 recurring jobs accepted within 24 hours, at zero cost. One lawn care operator eliminated \$3,000 to \$5,000 per month in Google and Facebook ad spend after deploying mass texting through their CRM. The CRM became the lead engine. The ad budget went to a different problem.

The channel rationale: text messages have a 98 to 99% open rate compared to 30 to 40% for email. New-customer estimate links sent by email frequently land in spam. The prospect never sees the quote.

CALL TRACKING, ATTRIBUTION, AND THE DATA THAT PAYS FOR ITSELF

One large operator runs about 4,000 unique call tracking numbers. One per marketing zone. Every print piece, digital ad, and zip-code zone gets its own local number. This enables revenue attribution down to the individual zone and ad unit. Marketing decisions stop being opinions.

For smaller operators, the starting infrastructure is much simpler:

- One tracking number per major lead source (Google Ads, Yelp, the major lead aggregators, organic search, print)
- Call recordings on by default
- Monthly review of recordings (transcription services at under \$1 per minute surface the exact natural language customers use to describe their problems; that language goes into ad copy and content)

The principle: track 5 to 10 KPIs and master them before expanding the dashboard. Tracking more creates noise without action. The short list that matters: booking percentage, average job size, repeat purchase frequency. All surfaced through the CRM.

THE LEAD-AGGREGATION MOVE

One large operator was losing leads from non-phone channels: Yelp, the major lead aggregators, Facebook, chat boxes. Their fix was a second CRM layered alongside their field service platform that aggregates all inboxes into one master queue, then auto-dials any lead with a phone number via VoIP so a CSR can press one key to connect immediately. Response time collapsed from "hours" to inside one minute.

You probably do not need two CRMs. But the principle is portable. A unified inbox is non-negotiable. The CSR should not be checking five different aggregator apps. Every lead should land in one queue. Every lead should have an auto-dial path if a phone number is present. Speed-to-lead is a structural problem, not a willpower problem.

THE FOUR-STAGE ADOPTION SEQUENCE

The delegation model that maps cleanly to CRM rollout:

1. Owner directs every CRM action
2. Employee suggests, owner decides
3. Employee decides and reports back

4. Full delegation, owner reviews only on outcomes

Most operators try to start at stage 3 or 4 and the rollout collapses. The team has not earned the trust. The system has not earned the team's trust. You have to march through the stages with one role at a time.

The sequencing for the whole infrastructure: org chart first, manuals second, training center and trainer development third. Automation without underlying structure is not a net positive. Software automates whatever process is already in place, good or broken. The right sequence is: build the process first, document it, then automate it.

The objection that derails this is the time objection. The reframe: "Tell me where you'll find the time to fix all the mistakes." Every hour not spent on ride-alongs and training generates a compounding backlog of mistakes that consume far more time to fix.

The same trap shows up as: "I could probably figure out a better way to do this, but I don't have the time to figure out a way to save time." That is the broken mentality every operator has to overcome before building operational infrastructure. The CRM rollout is the work that creates the time it requires.

THE "30 TO 60 DAYS AWAY" TEST

The standard for a truly systematized business: "If I walked away for 30 to 60 days and couldn't make a phone call or return an email, the business runs just fine."

If your CRM, scorecards, and dispatch model would pass that test, you own a business. If they would not, you own a job. The rollout is what closes the gap.

The 70% clone principle quantifies the gain. One owner at full output equals 1.0. One hundred employees performing at 70% of the owner's standard equals 70x the output. The power of systems is not making each person perfect. It is multiplying a repeatable standard across enough people. That requires manuals and scorecards, not heroic individuals.

IMPLEMENTATION CHECKLIST

CRM selection

- ☐ Current stack consolidated to one platform where possible (Stage 2 and up)
- ☐ CRM choice matches stage (basic CRM at Stage 1, all-in-one at Stage 2, enterprise platform at Stage 3 for trades that fit)
- ☐ "We do it this way" objection answered with the thousand-tech scalability test

Configuration and data integrity

- ☐ Booking rate calculation audited against a sample of real calls
- ☐ Cancellation rate tracked per CSR
- ☐ Close rate segmented by service type, customer type, lead source, and zip
- ☐ AI call analysis implemented or manual call sampling scheduled monthly

Scorecards

- ☐ Every seat has a 3 to 5 metric scorecard tied to CRM data
- ☐ CSR scorecard: booking rate, cancellation rate, quality, attendance, service agreement attach
- ☐ Dispatcher scorecard: billable hours, tech-to-job match, on-time, warehouse load time
- ☐ Tech scorecard: close rate, average ticket, reviews, callbacks, referrals
- ☐ Owner scorecard: revenue, margin, cash, retention, NPS

Dispatch

- ☐ Dispatch model is "best tech for best opportunity," not nearest available
- ☐ P1/P2/P3 priority taxonomy documented
- ☐ Dispatcher LMS or video SOP library started (5 core scenarios first)
- ☐ Dispatcher reports to service manager, separate from CSRs (structural best practice)

Automation

- ☐ Post-job text fires within one hour of every completed job
- ☐ Automated review request sequence active (use a review management platform or in-platform tools)
- ☐ Quote follow-up sequence active at 48 hours
- ☐ Seasonal upsell texts scheduled per service segment
- ☐ Lapsed customer reactivation sequence at 30/60/90 days

Lead aggregation

- ☐ Single unified inbox for all non-phone leads
- ☐ Auto-dial path for any lead with a phone number
- ☐ Call tracking numbers in place for major lead sources
- ☐ Call recordings on by default; monthly review scheduled

Adoption

- ☐ Org chart documented, every seat has an owner
 - ☐ One role rolled out fully before moving to the next
 - ☐ Time objection answered ("tell me where you'll find the time to fix all the mistakes")
 - ☐ "30 to 60 days away" test run quarterly
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WHAT THIS SYSTEM PRODUCES

One GM-run lawn care location runs at \$844,767 in revenue and \$130,446 in net profit. The owner has never visited the current shop or met the technicians. That is what the CRM, scorecards, and adoption sequence make possible. Not a \$1B operation. A profitable, transferable, absentee-ownable business at a scale most operators can actually reach.

A 67,000-customer year, 95% top-CSR booking rate, COVID-proof remote call center, and 200+ employee scale all run on the same machinery: CRM as the single source of truth, scorecards per role, dispatch as a conversion lever, and adoption as a deliberate four-stage move.

Start where the leak is largest. For most operators that is data integrity. You cannot manage what you cannot measure, and you cannot measure if your CRM is configured to lie to you. Fix the data first. The scorecards build on top of that. The automation builds on top of the scorecards. The "30 to 60 days away" business builds on top of all three.

The Lead Response Playbook covers what happens in the first five minutes. The Customer Journey SOP covers what happens before, during, and after the job. This guide is the system architecture that makes both of those possible. Build the brain. Then everything else has somewhere to run.

All tactics in this guide are sourced from operators who use them at scale. Every benchmark, configuration rule, scorecard component, and adoption sequence comes from named operators running these systems across organizations ranging from single-location shops to 200+ employee national operations. Full source index available in the BurksUP Field Intelligence Library.

• WHAT'S NEXT •

READY TO *INSTALL* THIS?

BurksUP builds the marketing systems that make home service operators findable, bookable, and referable. This guide is the playbook. We're the team that installs it.

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