# 10 Questions to Ask When Choosing a Contractor Sales Quoting Software

You no longer see roofing contractors using hammers and nails when installing a new roof. They found ways to automate their work, in this case, the pneumatic nail gun.

Of course, you can still use hammers and nails, but it'll take 5 times longer. And while bragging about driving a nail in one hit is sometimes how you get through a day, roofing contractors would never stay competitive if they didn't use nail guns.

Same thing with a sales tool. Paper estimates worked in the past. Excel as well. But if you want to save time, scale your business, and get ahead of competitors, you need a sales enablement tool that integrates with the rest of your tech stack, scales with your business, and allows you and your team to run your sales process smoother than a nail leaves a nail gun.

**Here are 10 Questions to Ask When Choosing Contractor Sales Quoting Software.**

## 1. How versatile is your software, and how does it fit into my sales process?

When looking for a sales quoting platform, you want to look for a company that allows you to scale your business without having to piecemeal several tools together to make an effective sales tech stack.

That's why contractors who are using Excel for their estimates can't grow their businesses at a higher level. They spend most of their time managing 5-6 different tools vs. selling and growing their business.

Today's clients demand a higher level of service, which includes clearly defined proposals, professional presentations, electronic signatures, and payment processing on demand. Look for a platform that allows you to do everything in one place.

## 2. Can you do in-person & remote measurements through the platform?

Look for a company with a built-in measurement tool that can accurately measure siding, doors, windows, roofs, fences, etc. It should be able to handle any project you're selling. If not, make sure that your sales software integrates with industry-leading measurement providers such as RoofSnap.

## 3. How robust is the estimating feature?

You want a sales platform that allows you to itemize individual components of a project. Materials, labor, overhead & profit should all be clearly defined. For example, if your client asks for an itemized quote, you should be able to provide that within the platform easily.

Look for software with a strong backend that allows you to manage different locations with different pricing (for example, if you're selling in different regions).

## 4. How steep is the learning curve?

There are many sales enablement solutions out there, but you want to look for one that doesn't take months to onboard and learn. You want to be able to train your team on it easily and to be able to train new hires without a huge learning curve.

We recommend looking for a company that provides training through the onboarding process and sets you up with an account manager after onboarding to support you and your team if anything comes up.

The software should have a user-friendly interface that's easy to learn by everyone on your team, even those who are not tech-savvy. PS: our partners at One Click Contractor do an awesome job of providing support during and after the onboarding process. We recommend them when it comes to this question. They don't ghost you once they get the check!

## 5. Is it preloaded with pricing? How do I get my prices loaded?

Look for a solution that loads your own pricing instead of using a national average cost database.

Loading your pricing makes your proposals unique to you and helps you remain competitive and profitable. It also allows your sales platform to function much faster and save you a lot of time.

Look for a software that allows you to easily update your price list, add discounts, and keep your pricing up-to-date.

## 6. Does it integrate with my CRM, lead provider, and other business tools?

Look for a platform that integrates with your lead providers (ex: EverConnect, Angi, & Houzz), your CRM (ex: MarketSharp), and other business & sales tools (ex: CompanyCam, Ingage, RoofSnap, CardConnect). It will eliminate double entry of information and keep you from spending too much time managing a huge tech stack.

## 7. Does it offer payment processing?

Your sales enablement software should be able to process credit cards, ACH, or offer financing without leaving the platform. Having the ability to create good, better, best options within the sales process helps to give the homeowner more choices and a better experience.

Look for a platform that has a built-in payment feature that allows you to streamline payment processing.

Make sure it also allows you to email & text payment links to your customers.

## 8. Do I need to have internet access, or does it work offline?

A sales software that requires a connection to the internet can be problematic in areas with poor cell coverage. Having the ability to capture scope, create estimates, and sign contracts without an internet connection is critical to your sales success.

Look for a tool that provides an offline capability.

## 9. Is there a mobile app available?

You want to empower your sales team to work anywhere and on any device. Look for a company that provides both web and mobile apps that you can use interchangeably. The software should have a mobile app or be mobile-friendly, allowing you to access it on the go.

Look for a tool that allows you and your team to take measurements, prepare & send quotes, accept payments, & offer financing, all on an iPad or a tablet.

## 10. Is it built by home remodeling professionals?

Look for a tool that's built by people who understand your business. Ask about the founders' experience in your industry. Make sure to pick a company that understands your pains and has a track record of helping companies like yours grow.

Look for a contractor sales software built by contractors.

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It's simplified my life so much. Seriously. What took a day now takes me about half an hour. And then, if I'm with a customer, I can be right there in their home, and they can sign right there. That's so nice. I can't say enough good things about One Click. I mean, it's helped me and my team be organized and saved me days on creating estimates.

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**— SARAH R. CO-OWNER, DEEP WATER DESIGNS**

**MarketSharp + ONECLICK Contractor**

MarketSharp partners with today's top sales quoting and estimating tools, like One Click Contractor, to allow you to streamline your sales process and automatically import projects into the MarketSharp CRM. Learn more about how MarketSharp integrates with One Click and other estimating tools to fuel your business.

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