CustomerFlows CRM

CRM Buyer's Guide for Contractors

15 questions to ask, feature comparisons, pricing traps to avoid, and honest recommendations

Choosing the wrong CRM costs more than the subscription. It costs months of wasted setup, abandoned data, frustrated team members, and leads that slip through the cracks.

This guide covers the 15 questions you should ask before signing up, a feature comparison of every major platform, a pricing breakdown with hidden costs exposed, and the red flags that mean a CRM was not built for contractors.

76%
of CRM features go unused by SMBs

20–70%
CRM implementation failure rate

51%
of SMBs still use spreadsheets as CRM

15 Questions to Ask Before Choosing a CRM

Your Business

■ How many leads do you get per month? (Under 20, 20–100, 100+)

■ How many people on your team need access?

■ Do you run different workflows for service calls vs. new installations?

■ Are you running Google or Meta ads right now?

■ What's your current lead follow-up process?

The Platform

■ Does it work on mobile? (Your team is in the field, not at desks)

- How long does setup take? (Minutes, days, or weeks?)
- Does it come with pipeline stages for your trade, or is it a blank canvas?
- Does it integrate with the tools you already use?
- Can you try it for free without talking to a salesperson?

The Deal-Breakers

- What happens to your price when you hit 1,000 contacts? 5,000? 10,000?
- Are there per-seat fees? What does it cost for your whole team?
- Is there a setup fee or mandatory training purchase?
- Can you export your data if you leave? In what format?
- Is there a contract, or is it month-to-month?

Scoring tip: If a platform can't clearly answer questions 11–15, that's a red flag. Transparent pricing and data portability are non-negotiable.

Feature Comparison: Every Major Contractor CRM

Feature	Customer-Flows	Jobber	Service-Titan	HubSpot	GoHigh-Level
Starting price	$49/mo	$49/mo	$200+/mo	Free (limited)	$97/mo
Unlimited contacts	Yes (all tiers)	No	No	No	Yes
Per-seat fees	No	No	Yes	Yes	No
Setup time	Under 10 min	Under 1 hour	4–6 weeks	1–2 weeks	2–4 weeks
Setup fees	None	None	$3K–$10K	None	None
Trade pipeline templates	Yes	Partial	Yes	No	Via snapshots
WhatsApp	Native	No	No	3rd party	No
AI chatbot	Built-in	No	Add-on	Add-on	$97/mo extra
Google Ads attribution	Yes	No	Call tracking	Yes (Pro tier)	Partial
Quoting / invoicing	No	Yes	Yes	No	Basic
Dispatch / scheduling	No	Yes	Yes	No	Basic
Best for	Lead capture	Quoting + scheduling	Large operations	Marketing teams	Agencies

What You'll Actually Pay (Hidden Costs Exposed)

Here's what each platform costs for a 5-person team with 2,000 contacts:

Platform	Base Price	5-Person Team	2,000 Contacts	Real Monthly Cost
CustomerFlows	$149/mo (Growth)	$149 total (no per-seat)	Included (unlimited)	$149/mo
Jobber	$129/mo (Grow)	$129 total (up to 7)	Included	$129/mo

Platform	Base Price	5-Person Team	2,000 Contacts	Real Monthly Cost
ServiceTitan	$200+/mo	$300–500 (per-seat)	Included	$300–500+/mo + setup fees
HubSpot	$45/mo (Starter)	$45 + $23 per seat	$45–$800 (contact tiers)	$135–800+/mo
GoHighLevel	$97/mo (Starter)	$97 total	Included	$200–400/mo (after usage)

The two biggest pricing traps:

1. **Per-contact pricing** — charges you more as your lead database grows, even for dormant contacts. HubSpot is the biggest offender.

2. **Hidden usage fees** — the base price looks affordable, but SMS, email, phone, and AI features are billed per-use. GoHighLevel's "$97/month" often becomes $200–400.

7 Red Flags That a CRM Wasn't Built for Contractors

Red Flag 1: No trade-specific templates

If you see a blank pipeline with "Lead → Opportunity → Closed Won," the platform was built for B2B SaaS sales teams, not contractors.

Red Flag 2: Per-contact pricing tiers

A growing lead database should be a sign of success, not a trigger for a higher bill.

Red Flag 3: Mandatory setup fees or training

If a platform charges $3,000–$10,000 for setup, the product can't be configured without expert help.

Red Flag 4: No mobile-first design

Your team works from trucks, not desks. If the mobile experience is an afterthought, your team won't use it.

Red Flag 5: "Contact sales" instead of pricing on the website

If they won't tell you the price, the price is high and variable.

Red Flag 6: No way to export your data

If you can't download your contacts and deals as a CSV at any time, you're locked in.

Red Flag 7: AI features as expensive add-ons

If AI chatbot costs $97/month extra per account, the platform is monetizing a feature that should be foundational.

Our Honest Recommendation

Most contractors need two tools. The lead capture layer and the operations layer are different problems:

Business Size	Lead Capture + Qualification	Operations + Scheduling	Total Cost
Solo / 1–3 employees	CustomerFlows Starter ($49/mo)	Jobber Core ($49/mo)	$98/mo
Growing / 4–10	CustomerFlows Growth ($149/mo)	Jobber Connect ($129/mo)	$278/mo
Large / 10+	CustomerFlows Scale ($349/mo)	ServiceTitan ($200+/mo)	$549+/mo

See how CustomerFlows handles the lead capture layer

Full Growth features for 14 days. Cancel anytime.

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See pricing | customerflows.com