

# 10 Common Points of CRM Failure

... and how you can protect your system investment

Construction Edition

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# CRM Failure

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# Introduction

CRM systems are a powerful tool for construction companies, but they can also be a source of frustration if not implemented correctly. Many companies struggle with user adoption, data quality, and process alignment, resulting in a poor return on investment.

This e-book explores the 10 most common points of CRM failure in construction, providing insights into why CRM projects fail and how to avoid those pitfalls.

By understanding these challenges and implementing effective solutions, construction companies can unlock the true potential of CRM and achieve significant improvements in efficiency, productivity, and profitability.



# Maintain Quality Data

Clean data is the foundation for accurate insights and informed decisions cemented in sound business process.



## Data Quality Issues



### Duplicate Entries

Multiple records for the same contact or project.



### Inaccurate Data

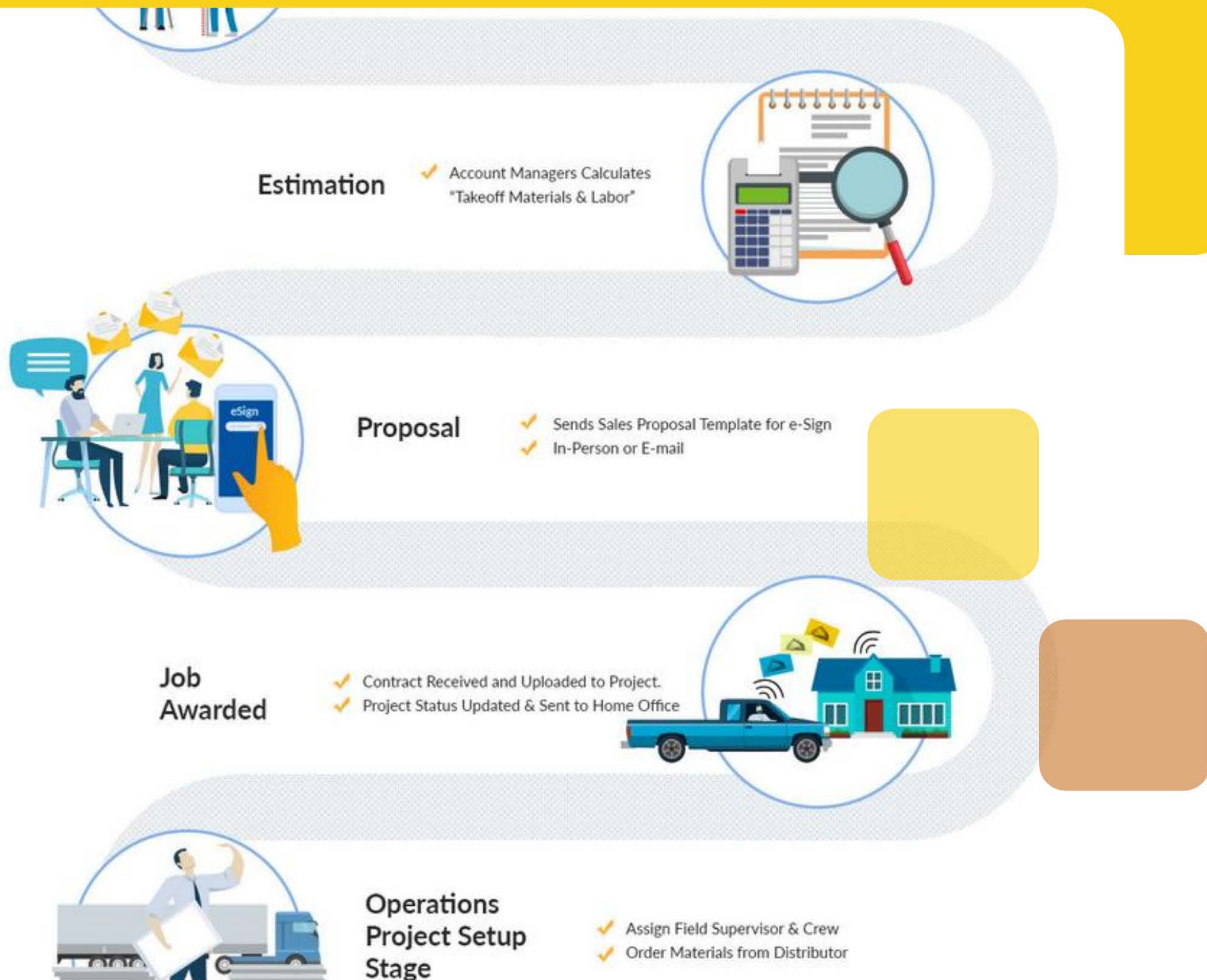
Incorrect or outdated information in the CRM.



### Missing Data

Incomplete or missing information in the CRM.





## Drive Process Alignment

### CRM Integration

CRM systems can streamline workflows by streamlining process with existing software used in construction, like bidding / estimation tools to accounting software.

This integration allows data to flow seamlessly between systems and processes, reducing manual data entry and connecting people together.

By aligning processes and automating tasks, construction companies can improve efficiency and gain valuable insights from their data.

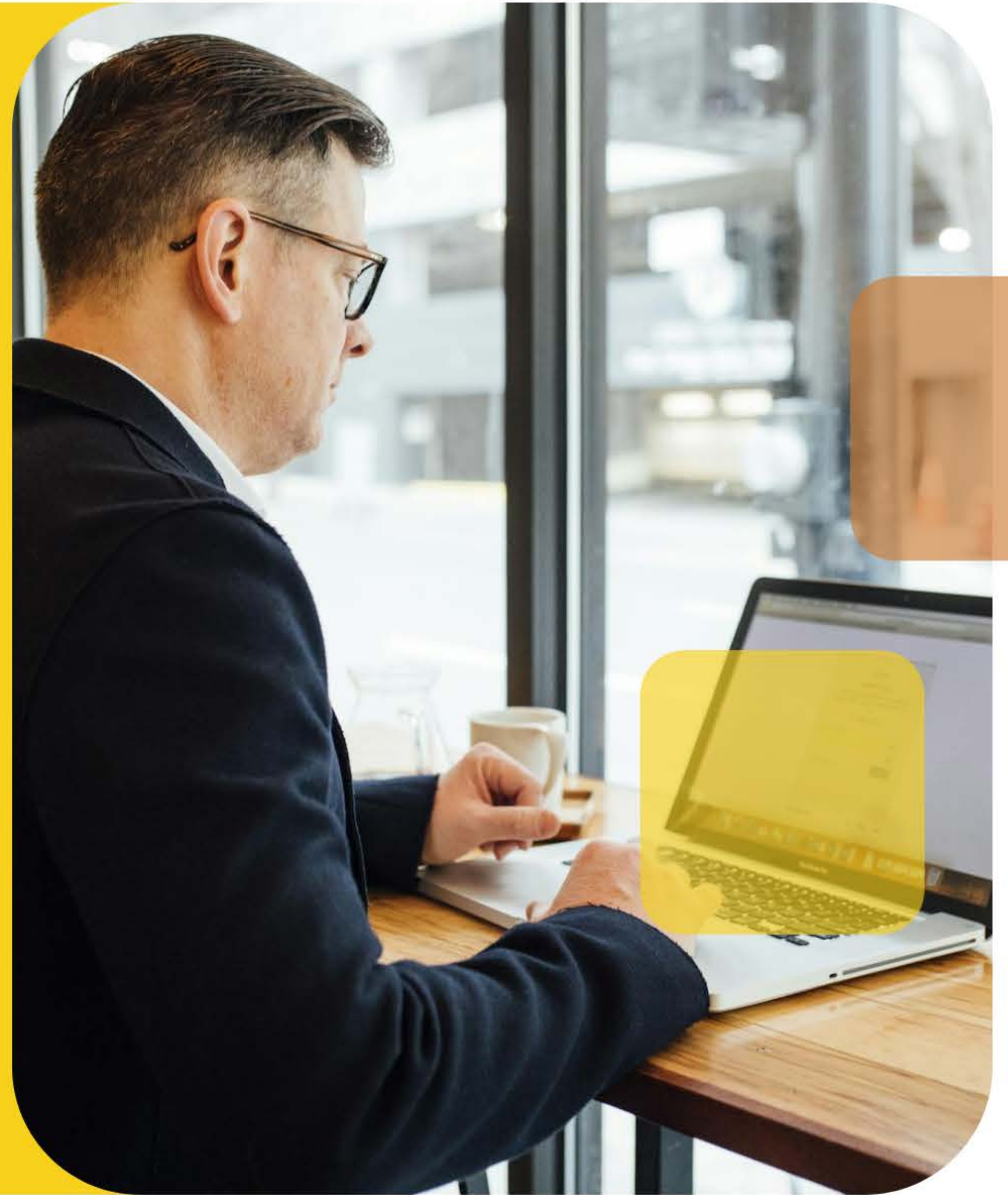
For example, an integrated process would prompt a user through workflow tasks to create a new job from a contract. An integrated system would automatically update project status in accounting. And synch important contact information.



## Automate Repetitive Processes

Automation frees up valuable time for strategic tasks and decision-making like updating spreadsheets and assembling bid proposals.

Consider the application of AI, workflow, and cloud technologies.



## Benefits of Automation



### Improved Efficiency

Reduced time spent on manual tasks.



### Reduced Errors

Minimized human error with automated tasks.



### Increased Productivity

More time available for higher-value tasks.





## Align Stakeholders

### Communication and Collaboration

A successful CRM implementation requires buy-in from all stakeholders, including management, project teams, and subcontractors.

Clear communication and training are crucial to ensure everyone understands the benefits and how to effectively use the system.

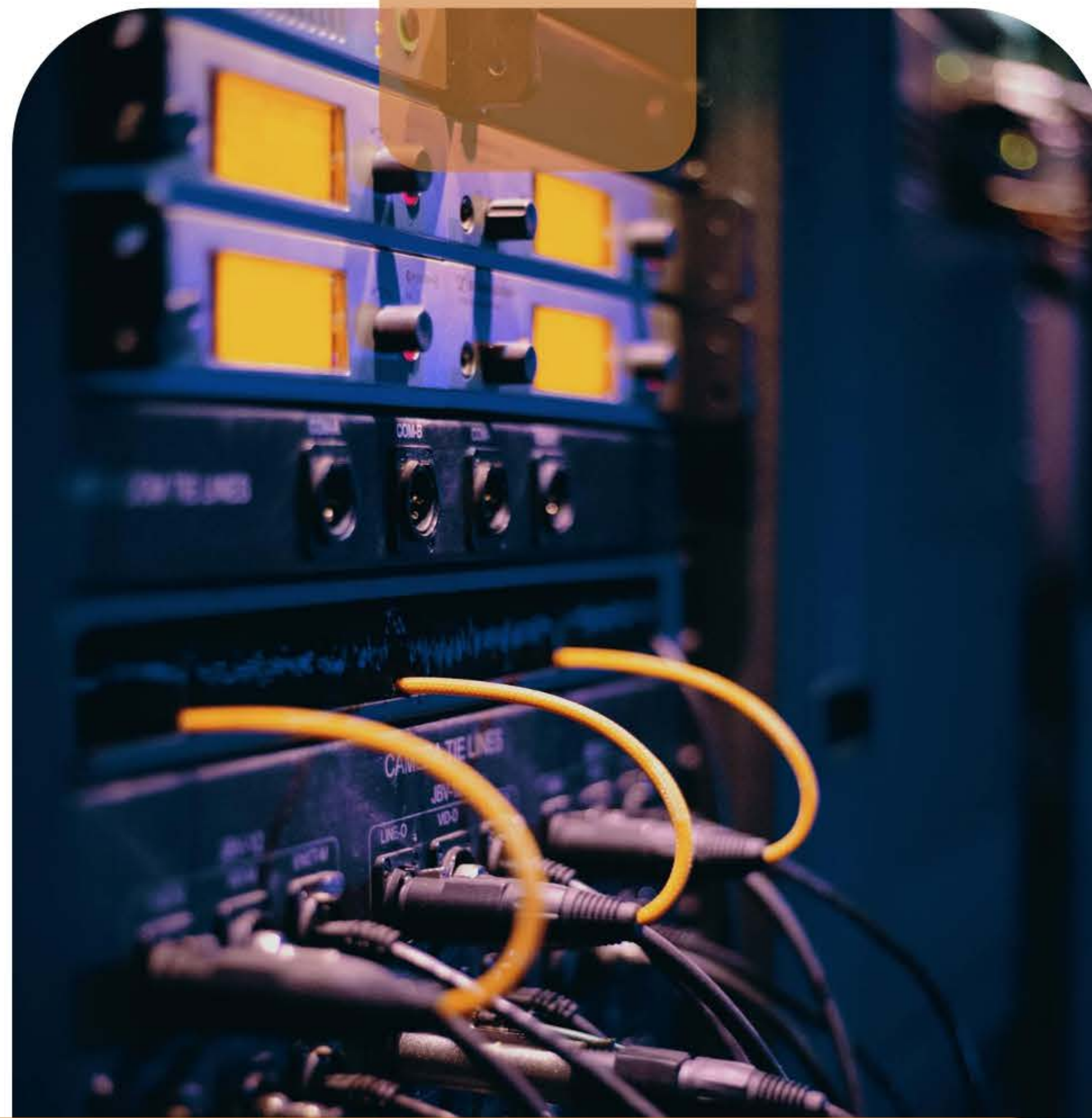
Collaboration features within the CRM can facilitate communication and knowledge sharing across teams.

By fostering a culture of collaboration, construction companies can streamline workflows and improve project outcomes.



# Integrate Systems

Seamless data flow between systems improves efficiency and avoids duplication of efforts.



## Benefits of Integration



### Real-Time Visibility

Access to up-to-date information across all systems.



### Automated Workflows

Reduced manual data entry and process bottlenecks.



### Improved Decision-Making

Informed decisions based on consolidated data.





# Empower Users

## User-Friendly Interface

A CRM system should be user-friendly and accessible to all users, regardless of their technical expertise.

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Simple navigation, intuitive features, and customizable dashboards can enhance user experience and encourage adoption.

By providing users with the right tools and resources, construction companies can empower them to effectively manage their tasks and contribute to overall performance.

Training and support are essential to ensure users are comfortable and confident using the CRM system.



# Data Visibility

Visualizing data makes it easier to understand trends and patterns.



## Benefits of Data Visualization



### Enhanced Insights

Improved understanding of trends and patterns.

Ex. Hit Rates, Margin, Backlog, Forecast, Margin, Material Price Changes



### Improved Communication

Effective sharing of data with stakeholders.

So that you can collaborate, decide, and act

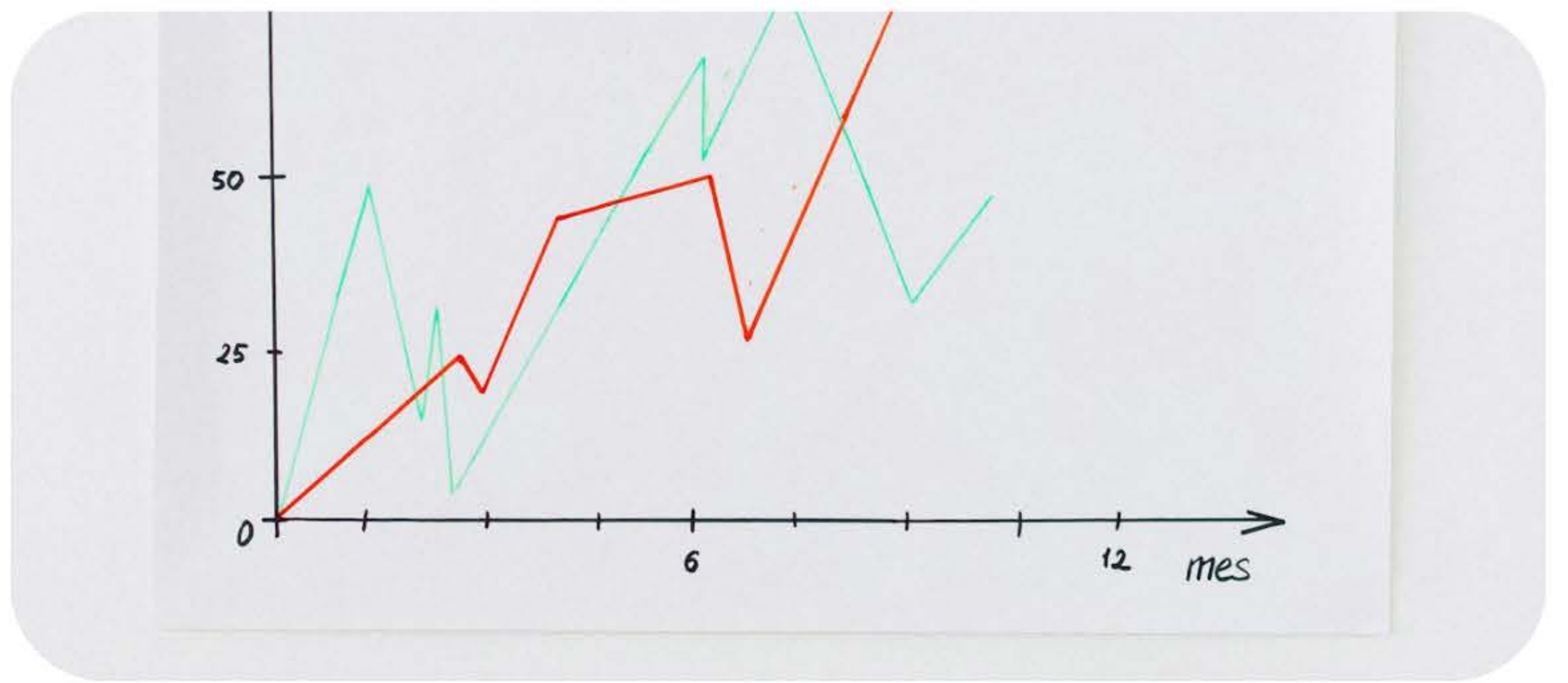


### Better Decision-Making

Informed decisions based on visual data patterns.

for when you need to negotiate contract pricing, hire staff, for example





## Drive Accountability

### Performance Tracking

CRM systems can track project progress and performance metrics, providing insights into team efficiency and areas for improvement.

By establishing clear goals and tracking performance, construction companies can hold teams accountable for meeting deadlines and exceeding expectations.

Data-driven performance reports can be used to identify bottlenecks, address challenges, and recognize successful initiatives.

This focus on accountability drives continuous improvement and ensures staff capture, close, and deliver projects on time and within budget.



# Incremental Improvements

Small, consistent changes can lead to significant improvements over time.



## Benefits of Incremental Improvements



### Reduced Resistance

Gradual changes are easier to accept and adapt to.



### Increased Efficiency

Improved workflows and reduced inefficiencies.



### Continuous Learning

Regular feedback and adaptation to optimize processes.



A collage of business charts and documents on a desk with a laptop keyboard. The charts include Morris Charts (Line, Area, Bar, Donut), Sparkline Charts, Easy Pie Charts, and a line chart comparing Sales and Orders. The documents are a spiral-bound notebook and a printed sheet with various charts and progress indicators (25%, 50%, 75%, 100%).

# Calculate ROI

## Measuring Success

It's crucial to measure the return on investment (ROI) of a CRM system to demonstrate its value to the business.

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Track key metrics like improved efficiency, reduced costs, and increased revenue to quantify the impact of the CRM.

Compare pre- and post-implementation data to assess the improvements and demonstrate the financial benefits.

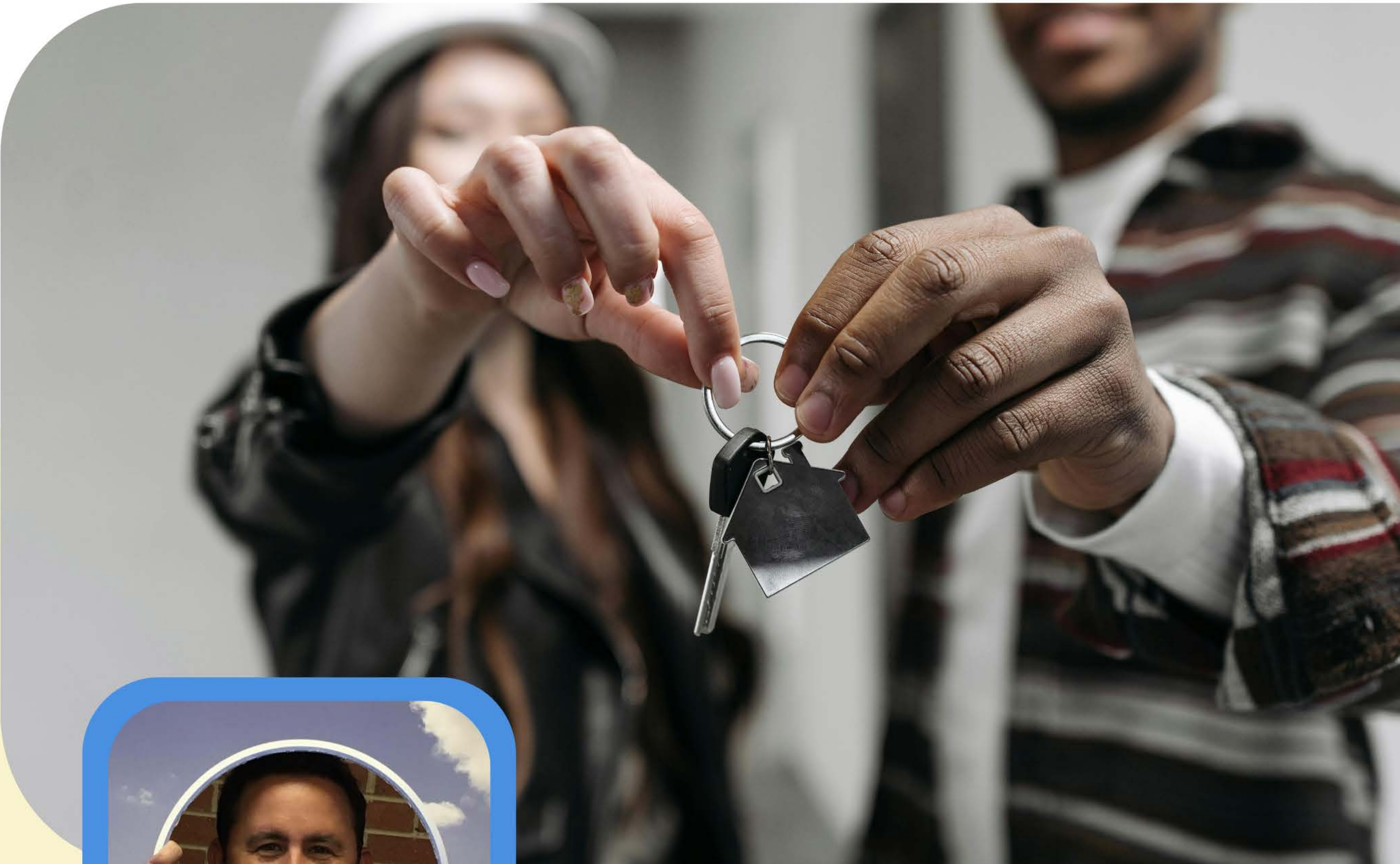
By highlighting the ROI, construction companies can justify the investment and ensure the CRM system delivers sustainable value.



# Summary

CRM systems are a powerful tool for construction companies, but their success depends on a comprehensive approach that addresses data quality, process alignment, stakeholder engagement, and user adoption.

By focusing on these key areas and embracing a culture of continuous improvement, construction companies can overcome common CRM challenges and maximize the benefits of their technology investments.



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