Customer Relationship Management

Best Practices Guide for Landscaping Businesses

Centralize All Customer Data

Keep all customer information—contact details, service history, preferences, quotes, invoices—in one CRM platform. This eliminates duplicate records, reduces errors, and allows your team to see the full customer picture at a glance.

Checklist

- ◯ Full name, phone, and email
- ◯ Property address and service zones
- ◯ Preferred services and frequency
- ◯ Notes on past issues or preferences
- ◯ Quotes, invoices, and payment status

Standardize Communication Workflows

Create templates and schedules for follow-ups, service reminders, and post-service check-ins. Use your CRM to automate email or SMS communication wherever possible to reduce manual tasks.

Examples of Useful Automations:

- Service confirmation text the day before a scheduled visit
- Seasonal reminders (e.g., spring cleanup, fall aeration)
- Satisfaction survey 24 hours after service

Segment Your Customers

Not all customers are the same. Use tags or segments in your CRM to categorize customers based on:

- Property size
- Service frequency (one-time vs recurring)
- Residential vs commercial
- High-value vs low-margin

Tailor marketing, upsells, and service offers accordingly.

Track Leads & Conversions

Your CRM should log every lead, where it came from (website, referral, flyer, etc.), and what actions have been taken. This makes it easier to follow up consistently and improve your marketing ROI.

Lead Management Best Practices:

- Assign follow-up tasks with deadlines
- Send quotes through the CRM and track opens/responses
- Mark stages (New Lead → Quoted → Closed Won/Lost)

Use Scheduling and Job Tracking

Integrate job scheduling with your CRM or use a CRM that supports route planning and job status updates. Field crews should be able to check their schedules and mark jobs as complete through a mobile app.

Must-Haves:

- Daily crew schedules
- Time tracking
- Job completion notes or photos
- Real-time updates to the office team

Maintain a Service History Log

Every visit should leave a record—what was done, who did it, how long it took, and any issues. This protects your business and helps with future upselling or troubleshooting.

Collect and Respond to Feedback

Use your CRM to automatically request feedback after jobs. Analyze recurring issues and make sure someone is responsible for follow-up. Address negative reviews promptly and professionally.

Measure Customer Retention and Lifetime Value

Use CRM reporting tools to understand how long customers stay with your business and how much they spend over time. Identify trends that signal loyalty—or churn.

Empower Staff With CRM Access

Give your team the tools and training to use the CRM properly. If your crews or office staff don't update notes or follow the workflow, the CRM loses value fast.

Training Areas:

- Entering job notes
- Tagging customers accurately
- Following task reminders
- Using mobile CRM features in the field

Keep It Clean and Updated

Set regular intervals to audit your CRM—remove inactive leads, merge duplicates, update outdated contact info. A cluttered CRM causes confusion and mistakes.