# How to Choose the Best Plumbing CRM Software

In our experience, many plumbing businesses manage sales and customer interactions using a patchwork of tools — Excel spreadsheets, paper estimates and invoices, filing cabinets, Google Drive folders, and more. For small shops, this approach can work well enough for a while. Many have operated profitably for years without a centralized system for tracking customers, jobs, and payments.

But as a business grows, this setup often starts to show cracks. Details get lost. Jobs slip through the cracks. Staff waste time chasing down information across multiple systems. The result? Slower operations, frustrated customers, and missed opportunities for growth.

That's where a customer relationship management (CRM) system comes in. For plumbing contractors, a purpose-built CRM can centralize everything in one place, streamline workflows, and help your team deliver better service while improving profitability.

**In this article, we'll explain:**

- What a plumbing CRM is
- The pain of not having one
- General-purpose CRMs vs. Trade-specific solutions
- An in-depth look at ServiceTitan's plumbing CRM and field service management solution

- [5 alternative plumbing CRMs to consider](#)

*If you'd like to learn more about how ServiceTitan can help your plumbing business become more efficient and grow revenue through improved customer relationships, [schedule a call today](#).*

# What Is a Plumbing CRM?

A **plumbing CRM** (customer relationship management) system helps contractors manage every interaction with leads and customers in one centralized place. Instead of juggling spreadsheets, sticky notes, and multiple apps, a CRM gives you a **single source of truth** for customer data—making it easier to track jobs, manage communications, and deliver excellent service at every stage of the customer lifecycle.

A comprehensive plumbing CRM goes beyond simple contact management. The best platforms **automate time-consuming tasks** like [scheduling](#), sending appointment reminders, generating invoices, and even following up on unpaid bills. By streamlining these processes, CRMs save plumbing businesses valuable time while improving the customer experience.

However, if you've never used a CRM before, it's not always obvious what this looks like in day-to-day operations. To put things into perspective, let's start by looking at how plumbing contractors typically manage customer relationships *without* a CRM—and why that often leads to missed opportunities and inefficiencies.

## The Pain of Not Having a CRM

Here's what it typically looks like when plumbing contractors don't have a modern CRM in place:

- **Residential Chaos:** Customer info is scribbled on paper, typed into Excel, or scattered across multiple systems. Follow-ups are manual. Scheduling is error-prone. Techs and office staff are constantly playing catch-up—and opportunities to upsell or cross-sell often go unnoticed.
- **Commercial Disorganization:** Large service or install opportunities are tracked in spreadsheets or siloed tools. Sales managers rely on gut feel or fragmented reports to gauge pipeline health. Without a unified system, it's hard to see who's working on what, where deals are stuck, or whether leads are actually converting.

**The consequences?**

- Missed or delayed follow-ups
- Poor coordination between sales, office staff, field techs, and service managers
- Inconsistent customer communication
- Lack of visibility into sales rep performance
- Revenue left on the table due to lost or mishandled opportunities

Whether you're a residential or commercial plumbing company, it all boils down to the same thing: a broken customer and [sales experience](#) that costs your business time and limits profitability.

## General-Purpose CRMs vs. Trade-Specific CRMs and Field Service Management Solutions

Within the broad category of CRM software, there are two main approaches:

- **General-purpose CRMs** like Salesforce, HubSpot, and Pipedrive serve a wide range of industries and business models.
- **Trade-specific platforms** that combine CRM capabilities with **[field service management (FSM)](#)** into one integrated solution designed for contractors.

General-purpose CRMs excel at managing customer relationships. They're built to handle lead tracking, nurturing campaigns, customer segmentation, and lifecycle management. For companies focused primarily on sales and marketing, these tools can be powerful out of the box.

However, when it comes to field service operations—things like job [scheduling](#), [dispatching](#) technicians, managing equipment and [inventory](#), or creating estimates and invoices—general-purpose CRMs often fall short. While integrations exist, they usually require:

- **Significant customization** to map your workflows to the CRM
- **Third-party add-ons** to connect scheduling, invoicing, and reporting
- **Ongoing IT resources** to maintain the tech stack

This complexity can add cost and create gaps in visibility between the office and the field.

For many contractors, particularly in trades like [plumbing](#), [HVAC](#), and [electrical](#), **trade-specific software** offers a more practical solution. These platforms combine CRM, FSM, and business management tools into a single system, enabling you to:

- **Track leads and manage the sales process**
- **Schedule and dispatch** technicians efficiently
- **Generate and send estimates and invoices** directly from the platform
- **Manage parts, inventory, and job costs** in real time
- Give your team a **unified view of every customer interaction**

By using one integrated solution, contractors eliminate the need for juggling [multiple apps](#) and reduce the risk of information silos or operational inefficiencies.

Below, we'll share several of these trade-specific solutions for you to consider, beginning with our platform, ServiceTitan.

# ServiceTitan: An All-In-One Plumbing CRM and Field Service Management Software

We've spent **nearly two decades** helping trade service companies run more efficient, more profitable businesses. From family-owned shops to large [commercial contractors](#) and [multi-location enterprises](#), we offer the features you need to streamline operations and maximize profits.

## Commercial Sales Pipeline Management to Track and Close More Deals
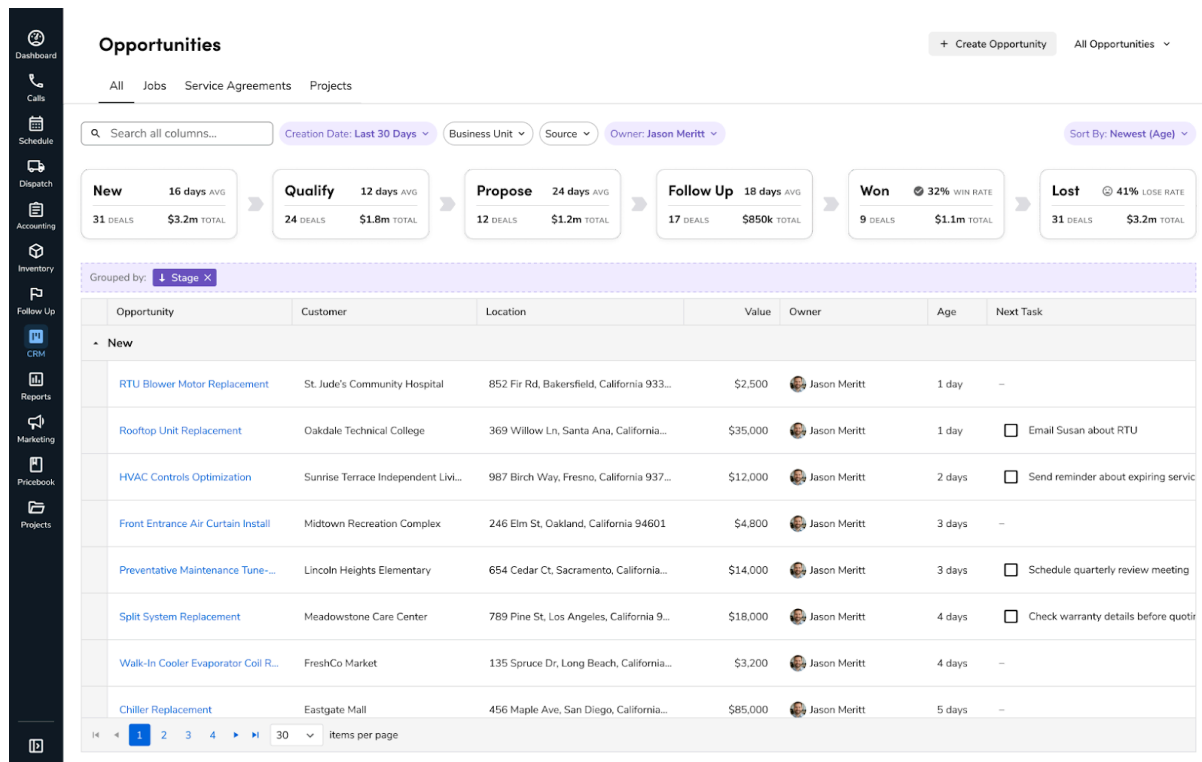


[Source: ]

ServiceTitan's commercial CRM functionality brings order to the chaos by letting you manage every sales opportunity in the same system you use to run your jobs.

**Key CRM capabilities include:**

- **Opportunity Tracking:** From site surveys to proposal follow-ups, track and manage your pipeline in one place, fully integrated with the rest of your operations.
- **Sales Meeting–Ready Reports:** Out-of-the-box reports let sales managers see performance by rep, review pipeline health, and track closed vs. lost deals.
- **Task Assignment by Sales Stage:** Assign next steps automatically as opportunities move from *New* to *Proposal Sent* to *Won*—keeping your sales team organized and accountable.

Building on this foundation, upcoming AI features will automatically flag hidden revenue opportunities based on notes or job details, helping generate more profit from existing work that may have otherwise gone unrealized.

If your business is looking to streamline your commercial sales process, reduce manual data entry, and gain full pipeline visibility, ServiceTitan's CRM gives you the tools to close more deals with less friction.

## Calling Booking Workflows for Smooth, Successful Phone Interactions

With ServiceTitan's plumbing service software, when a customer call comes in — either via phone, web inquiry, or chat — there's no need for the CSR to juggle a pen, paper, and spreadsheet.
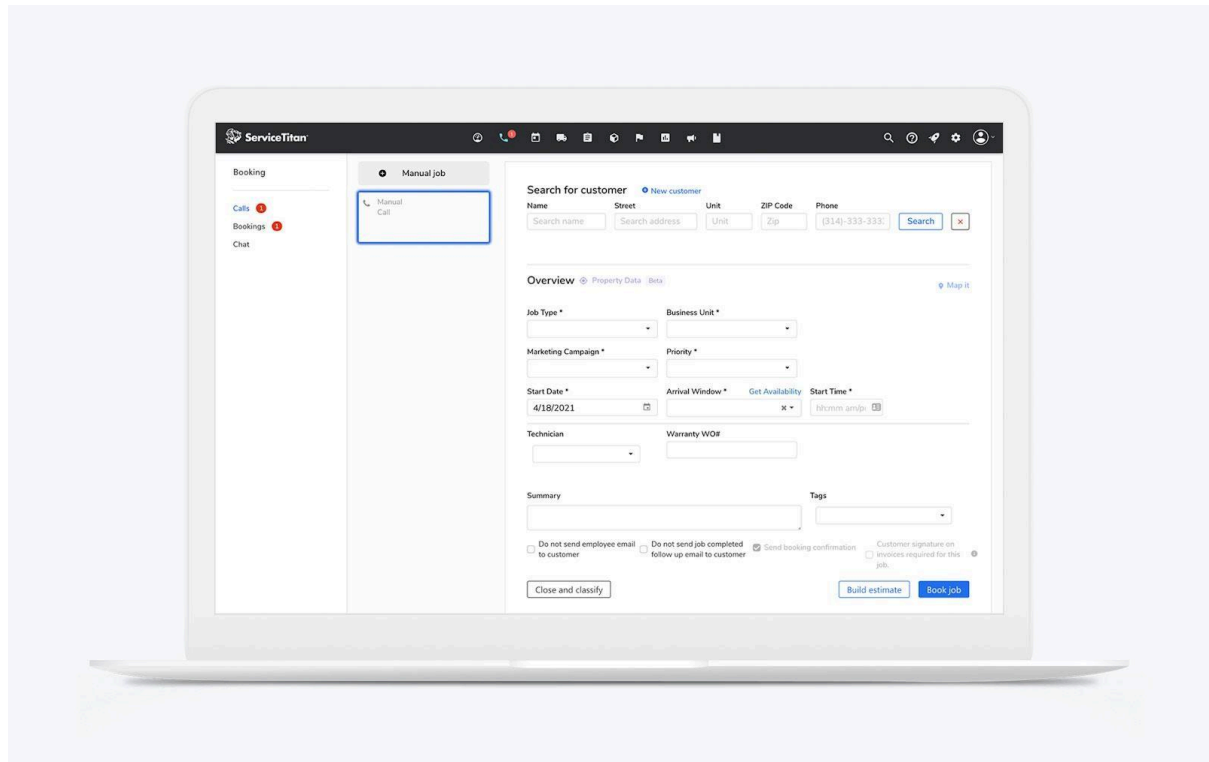


[Source: Call Booking: Manual Call (Laptop)]

Using drop-down menus and custom prompts, they can simply enter the customer information directly into their system, including job type, start date, priority, and more.

If the call is from an existing customer, ServiceTitan will tell the CSR exactly who is calling before they even answer the phone. That way, they can access their job history immediately, ensuring they're prepared to answer questions about previous or ongoing work, and quickly book new jobs.
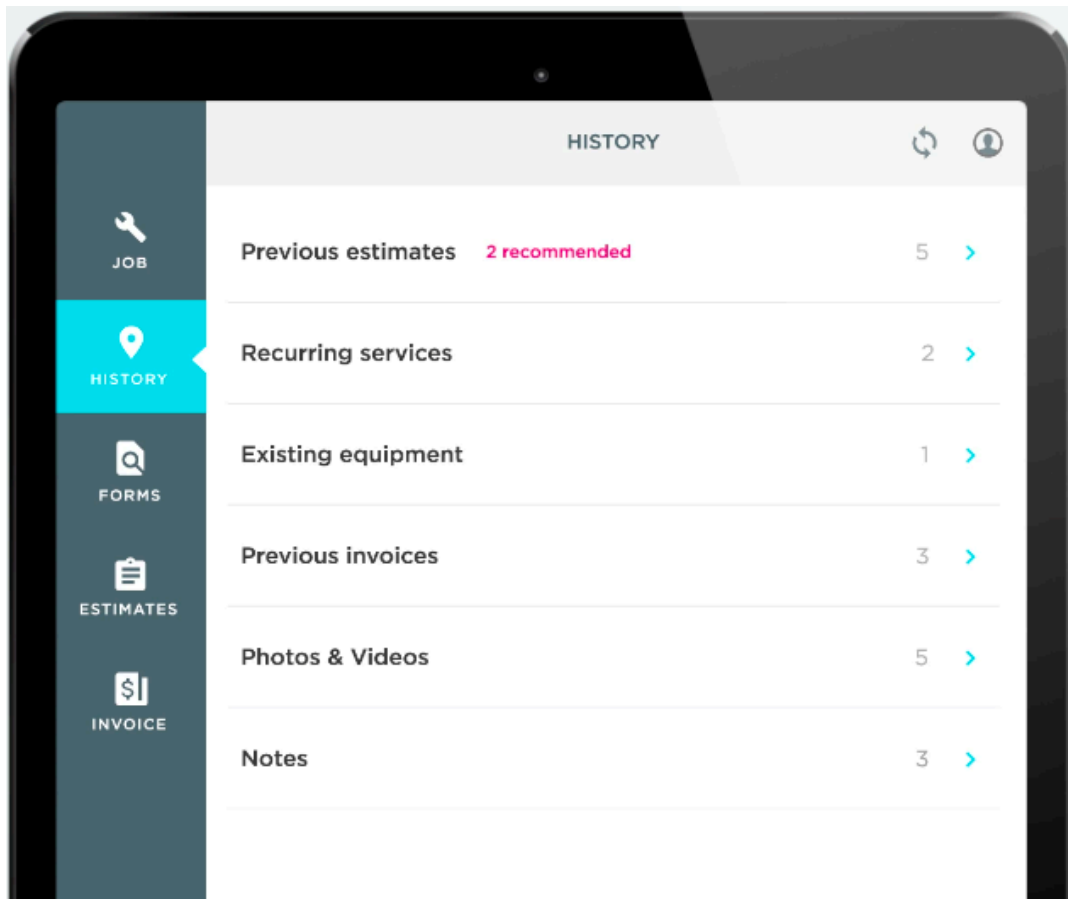
[Source: Product Screenshot (Raw) | Mobile Workflow 3 [Tablet]]

With web-based, user-friendly service management software like ServiceTitan, there's no need for CSRs to put customers on hold or call them back while they pull paperwork from a filing cabinet. Plus, they don't have to hope that it's legible, correct, and isn't dirty from spending time in a technician's truck.

*Note: With ServiceTitan's CRM, you can add a Web Scheduler or Chat to Text widget to your website and give customers an easy way to schedule a job or start a text conversation online.*

Further reading from our ServiceTitan playbook:

- [Answering the Phone](#)
- [Outbound Call Scripts](#)
- [Call Center Analytics](#)

## Scheduling and Dispatching That Prioritize Customers and Maximize Profit

With each existing customer's service history, the CSR knows which tech to assign to each plumbing job. And if there's any confusion, [ServiceTitan's dispatch software](#) offers a suite of features to help them sort things out quickly, including:

- Geographical booking zones
- Tech availability calendars
- Skill ratings (to name just a few)

These dispatching features help CSRs send the right tech to the right job.
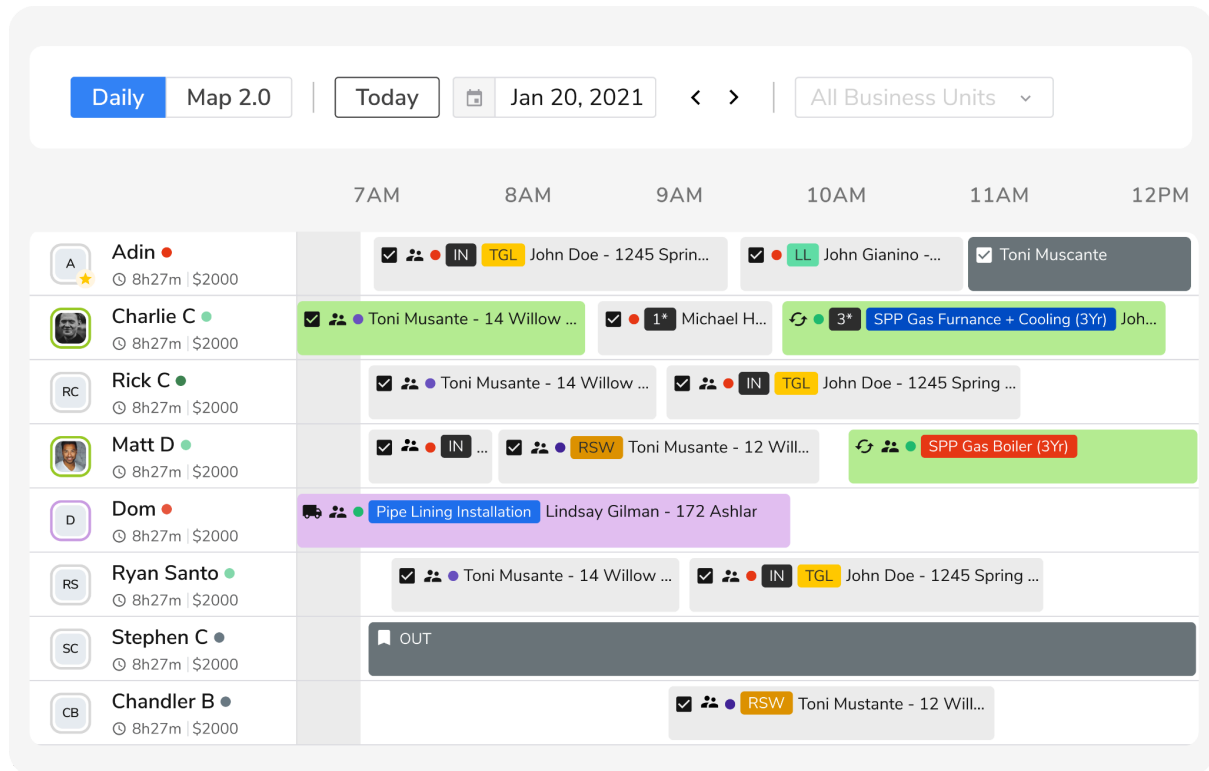


[Source: Product Illustration | Dispatching - Daily Calendar (Desktop)]

ServiceTitan's route optimization feature uses GPS to track techs and job progress so that visits can be organized to suit the technician's location, taking into consideration traffic conditions.

Being able to view the exact location of each truck in real-time means dispatchers can group nearby jobs and utilize the most efficient route. This allows techs to handle more jobs in a given day or do the same number of jobs in less time, increasing employee experience and satisfaction and bringing in more revenue.
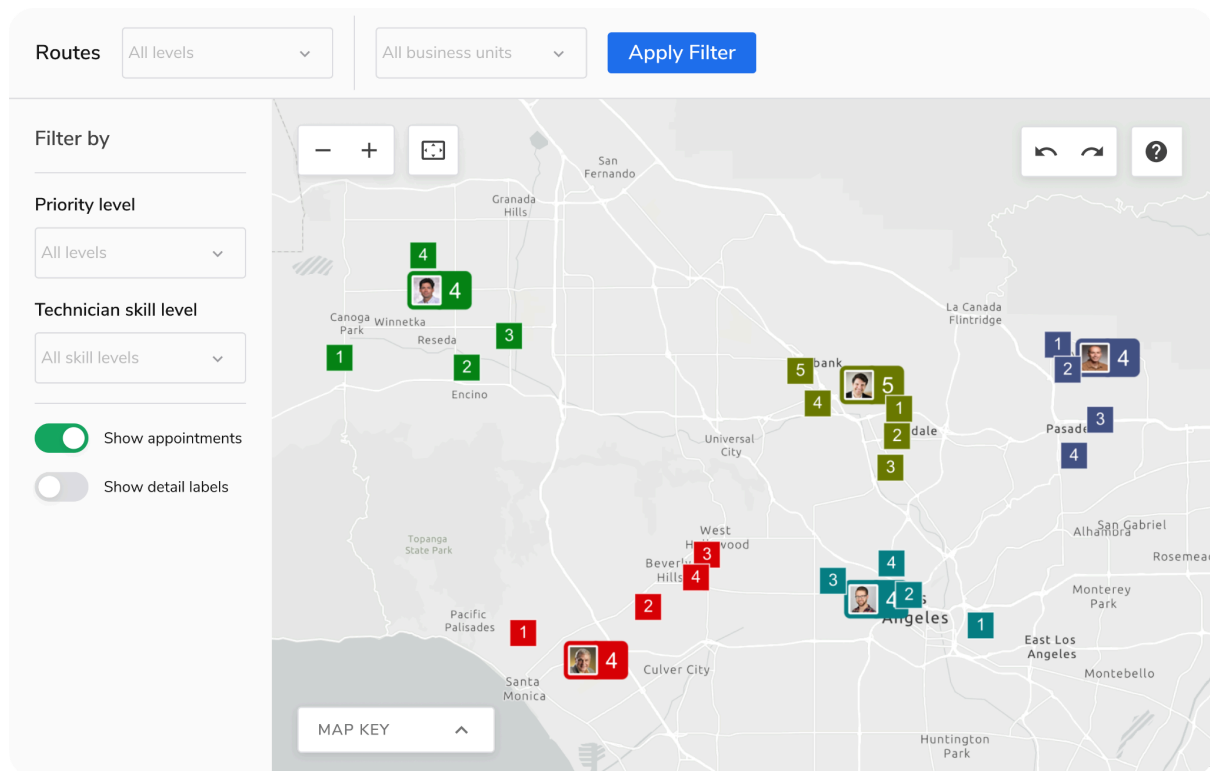
[Source: Product Illustration | Route Optimization (Desktop)]

Scheduling changes can be made easily, too. For example, when a call for an emergency job comes in, a dispatcher can easily see and assign the closest available technician.

*ServiceTitan also offers an add-on product, [Dispatch Pro](#), with more advanced dispatching features. Using machine learning, Dispatch Pro's algorithm runs thousands of scenarios to find the best technician for every job. This, plus its intuitive dispatch board automations, saves your dispatchers time, improves customer satisfaction, and [maximizes profit](#).*

*For further reading, take a look at our article on [dispatching tips in this post](#).*

## Automated Texts That Improve Customer Satisfaction

Plumbing contractors who use ServiceTitan don't need to worry about making confirmation calls the evening before a visit or about calling the day of the appointment to let them know when their tech will arrive.

The software takes care of both of these contacts with automated texts — including a link — providing customers with a GPS tracking tool so they can monitor their tech's arrival in real-time, as well as a photo and some fun facts about them. That way, customers already have a degree of comfort with their tech when they get there.
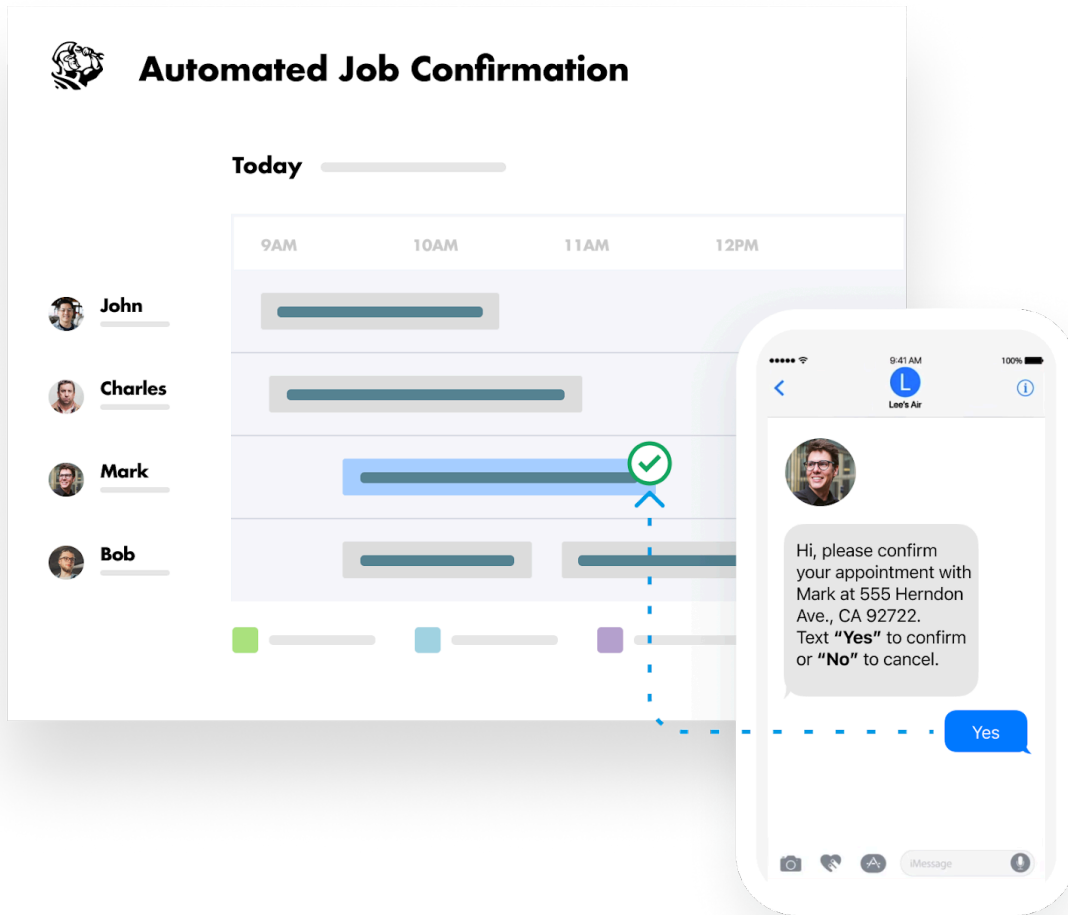
[Source: Automated Job Confirmation Text Message | Abstract]

*Read more tips on how to improve the customer experience.*

## Call Recordings For Staff Accountability & Training

With ServiceTitan, every call is recorded and logged into the relevant customer's account. Before a tech reaches a customer's location, they can listen to the CSR's conversation(s) with that customer via our Mobile App (available for Android and IOS), arming themselves with every detail that might improve their sales or service call.
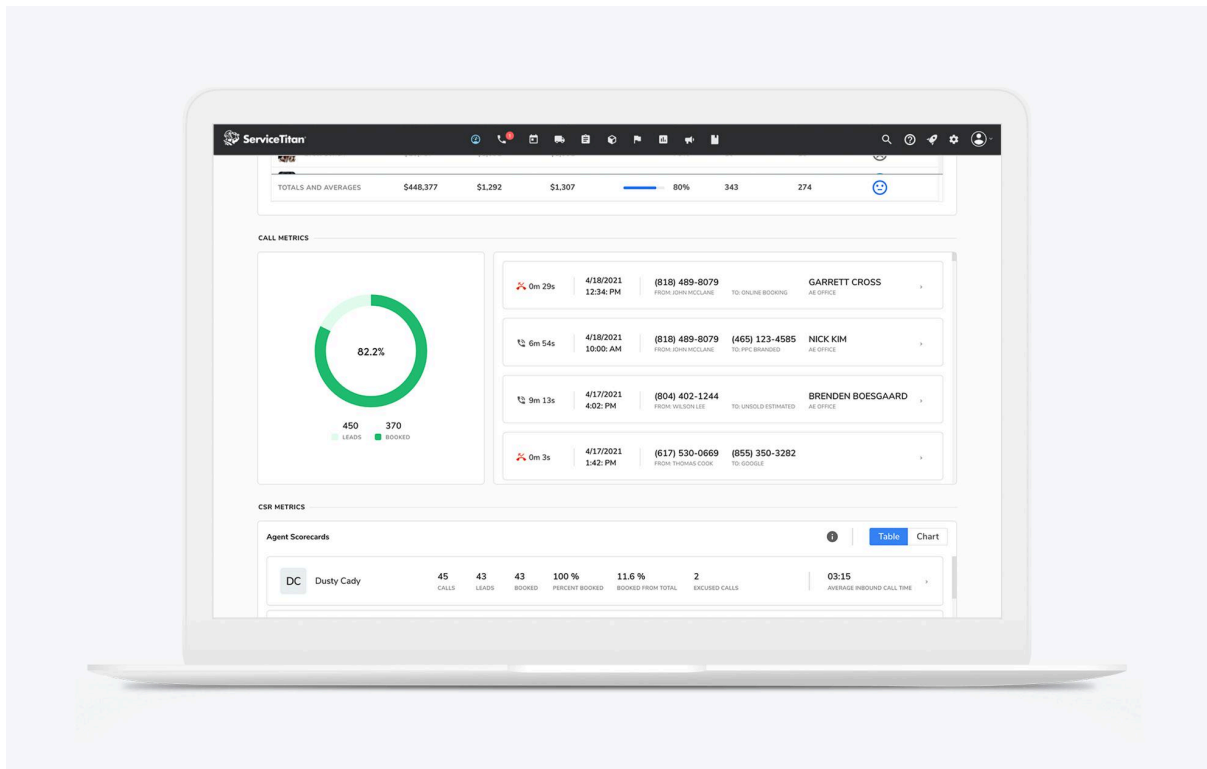
[Source: Dashboard | Call Metrics]

The feature is also great in the event of minor confusion — for example, an address number that was inadvertently entered as 612, rather than 621.

Plumbing business owners love this feature for the accountability it provides. It allows contractors to better coach CSRs on how to handle customer interactions, as well as how to negotiate with customers when disagreement or nonpayment occurs, with background intelligence that is as accurate and well-documented as possible.

# Improve Follow-Up Consistency to Increase Revenue
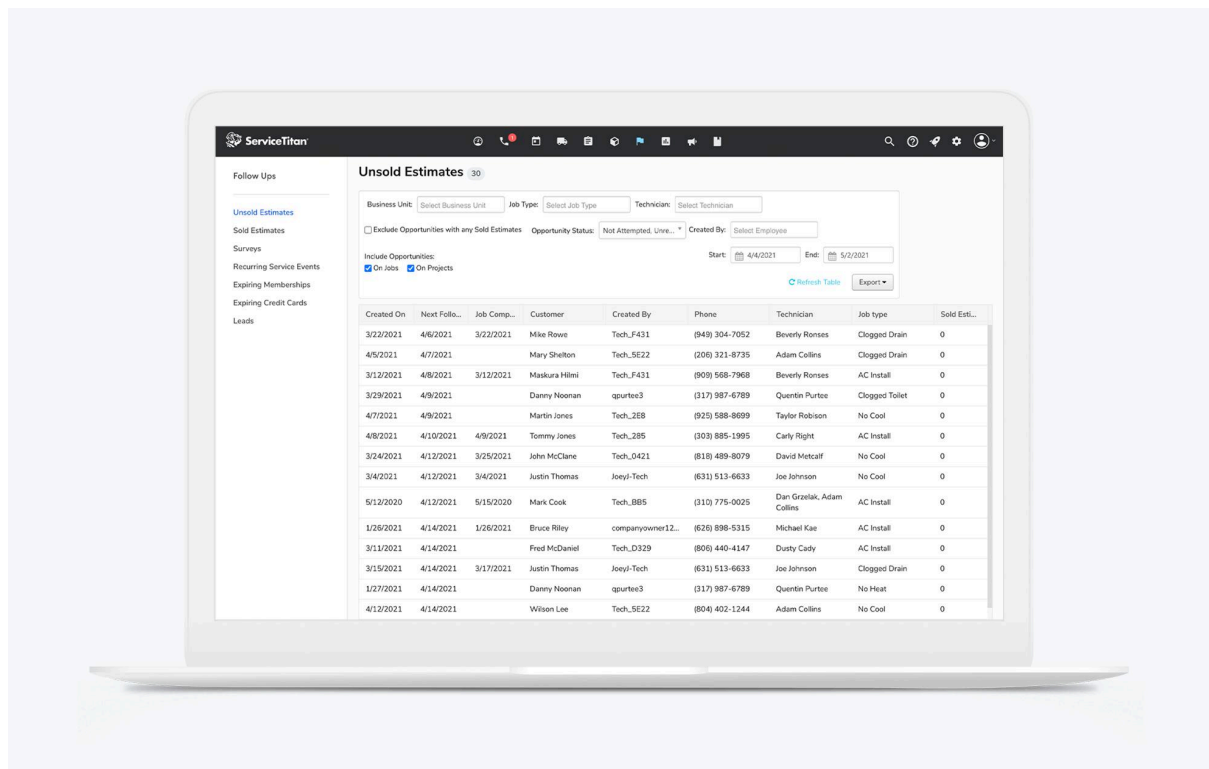


[Source: Product Illustration | Unsold Estimates - Follow Ups]

Using the **Follow Ups** menu, ServiceTitan users can efficiently execute a range of post-call tasks that are crucial to maximizing revenue. For example, CSRs can follow up on unsold estimates in a regular, methodical fashion, ensuring that their employer is leaving as little money on the table as possible.

Just by following up on unsold estimates, we've seen contractors improve their bottom line by as much as $1 million in a single year.

Further reading:
- How plumbing estimating software improves bidding & growth
- Plumbing estimating apps: Key advice and 7 options to consider
- Plumbing pricing guide: How to price jobs for profit

## Offer Convenient Payment Options From the Office or Field

ServiceTitan simplifies payment processing from both the office and the field.

Plumbing techs can create invoices and take payments from their mobile devices on the spot. Customers can enter credit card information directly into their tech's tablet, or follow a link via text to submit payment online.
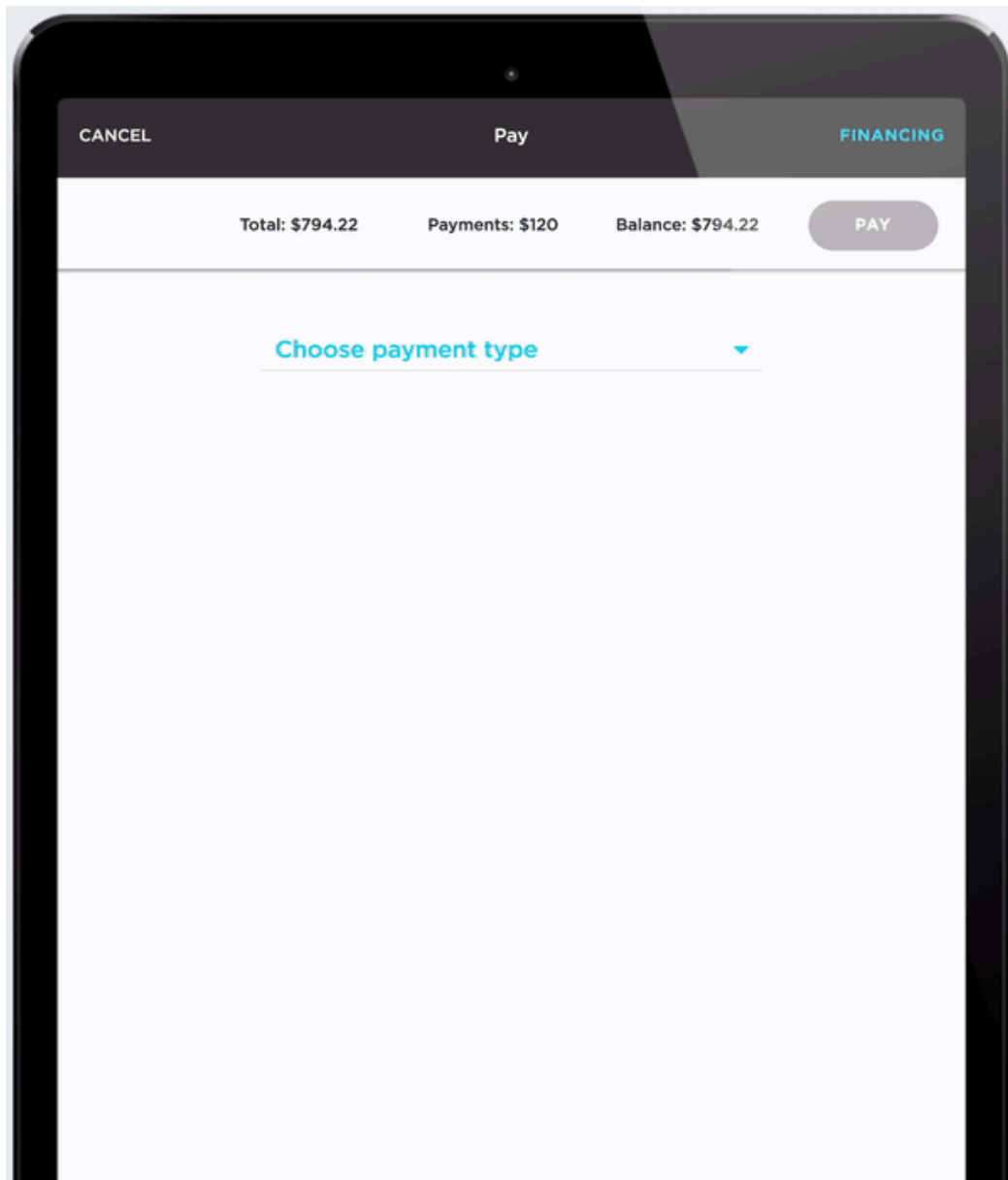
[Source: Mobile Payments /// Mobile Payments in ServiceTitan: Easily deposit checks and authorize credit card transactions]

Being able to create invoices and take payments in this way is convenient for customers and means revenue hits your bank account sooner, too.

It's worth noting that ServiceTitan integrates with multiple types of accounting solutions, including QuickBooks. So there's no need to re-enter payment info from one app to the next; everything stays up-to-date and organized for you.

ServiceTitan also streamlines your internal payroll processes. The time tracking feature automatically documents your technician's drive time, vendor runs, and wrench time on their timesheets so you can be confident that it's accurate.

## Track KPIs to Improve Staff and Business Performance

Being able to monitor individual phone calls with customers is great for training and accountability. But ServiceTitan also gives business owners a more comprehensive, instantaneous view of their CSRs' performance, in the form of a scorecard.
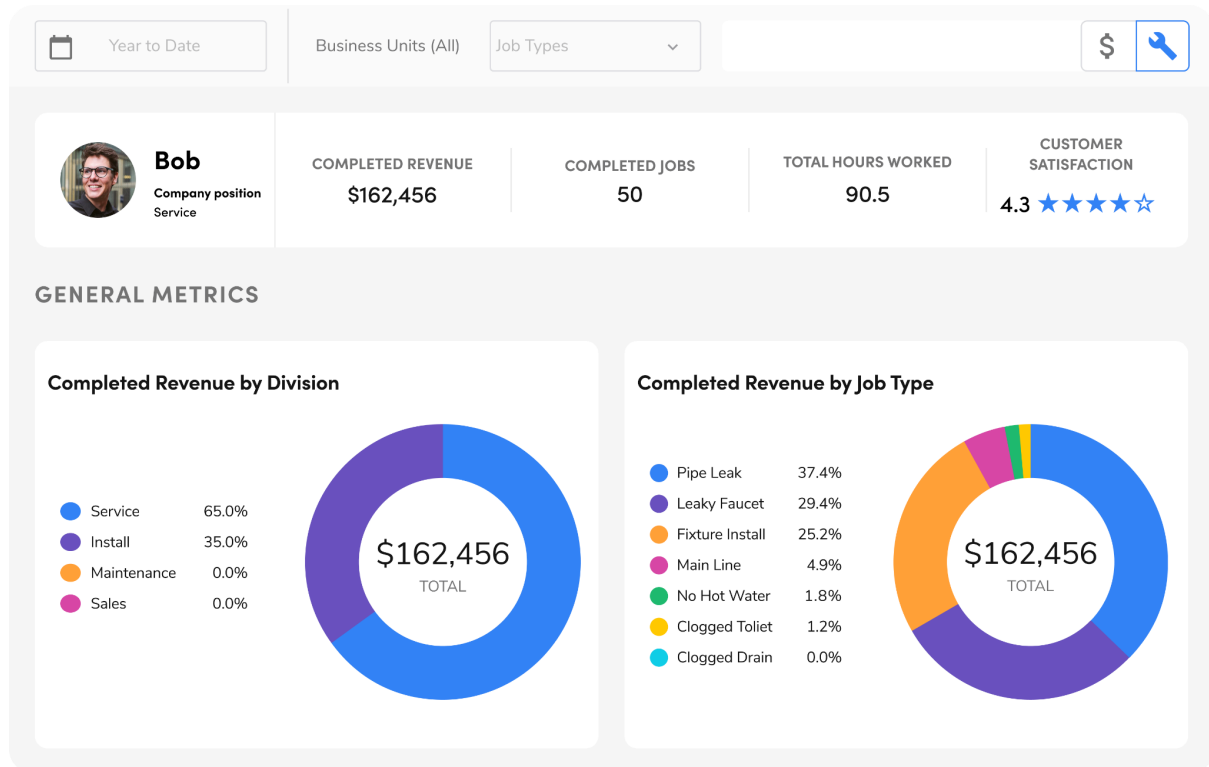


[Source: Product Illustration | Technician Scorecard [Bob]]

Contractors can see how many calls their employees are booking, what percentage of potential business they're booking, how long they're taking to do it, and more. They can also zoom in on individual calls to see what might have gone right or wrong, and where improvements can be made.

In addition, ServiceTitan offers customizable dashboards and reports to track company metrics like total revenue, total sales, total average sales, total job average, call booking rate, and total conversion rate. You can even look at this over an 18-month trend (or weekly trend) to keep an eye on how your business is running.
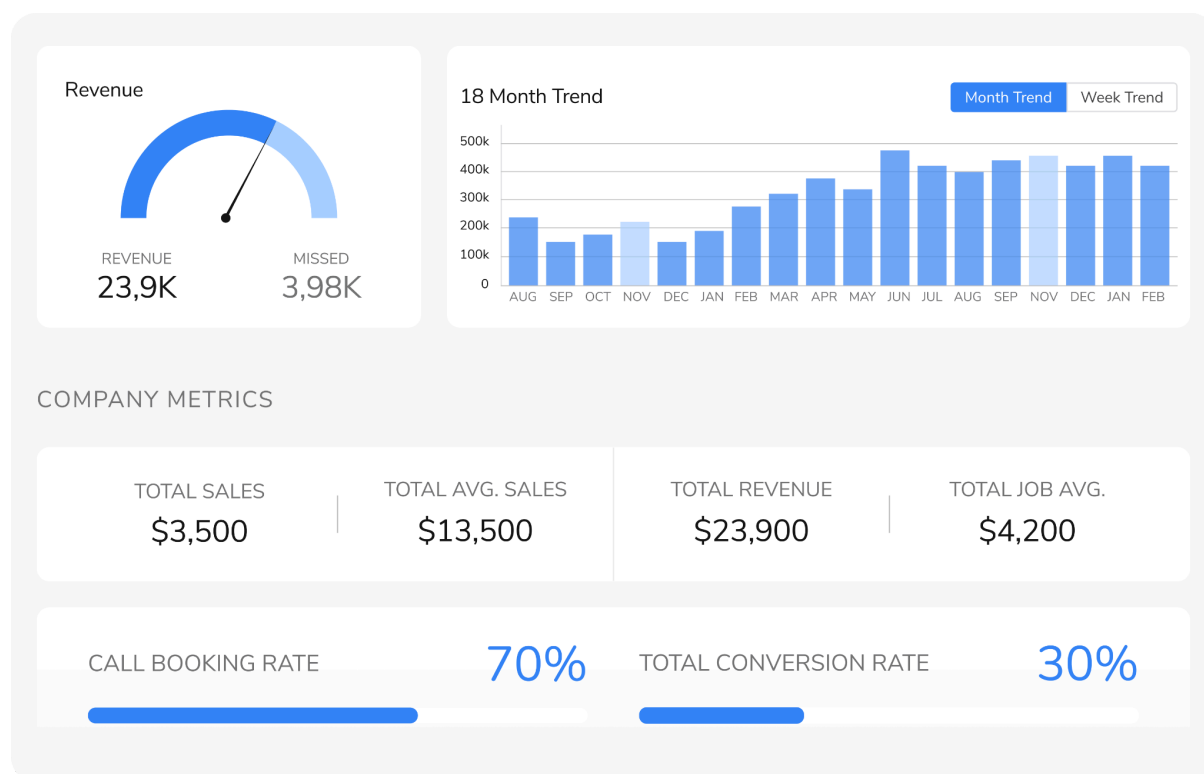
[Source: Product Illustration | Reporting Dashboard]

## Get a Live Walk-Through of ServiceTitan's Plumbing CRM and Field Management Software

The best way to see what our platform can do is to schedule a free demo with our team.

*Join 100,000+ service professionals using ServiceTitan to streamline operations, grow revenue, and work smarter. [Schedule a free, live demo](#) to see how our CRM and field service management features can support your business.*

# 5 Alternative Plumbing CRMs to Consider

## Commusoft
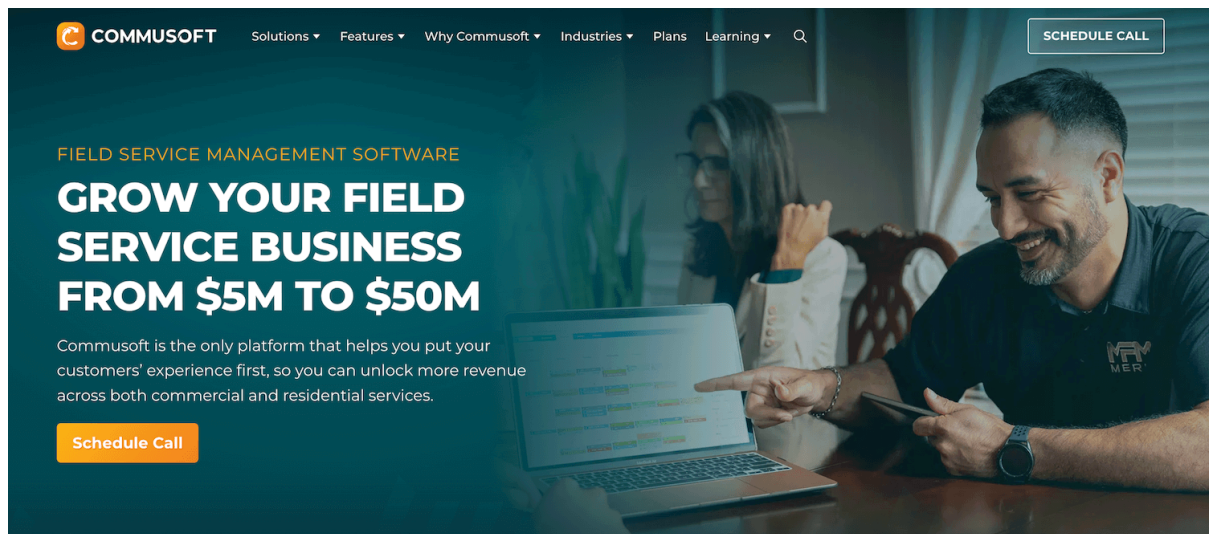

[Source: Commusoft homepage]

Commusoft is an all-in-one work order management software designed for field service companies. Used by small businesses, the software helps with job management, quotes, scheduling, inventory management, invoicing, and customer communications. It also integrates with accounting and payment solutions.

Plumbers can access customer information via their mobile device, and all data is synced in real-time, so staff are up to speed on work orders at all times. Techs can also create invoices on the go and email them to customers. Commusoft also provides users with performance reports and charts.

## Housecall Pro
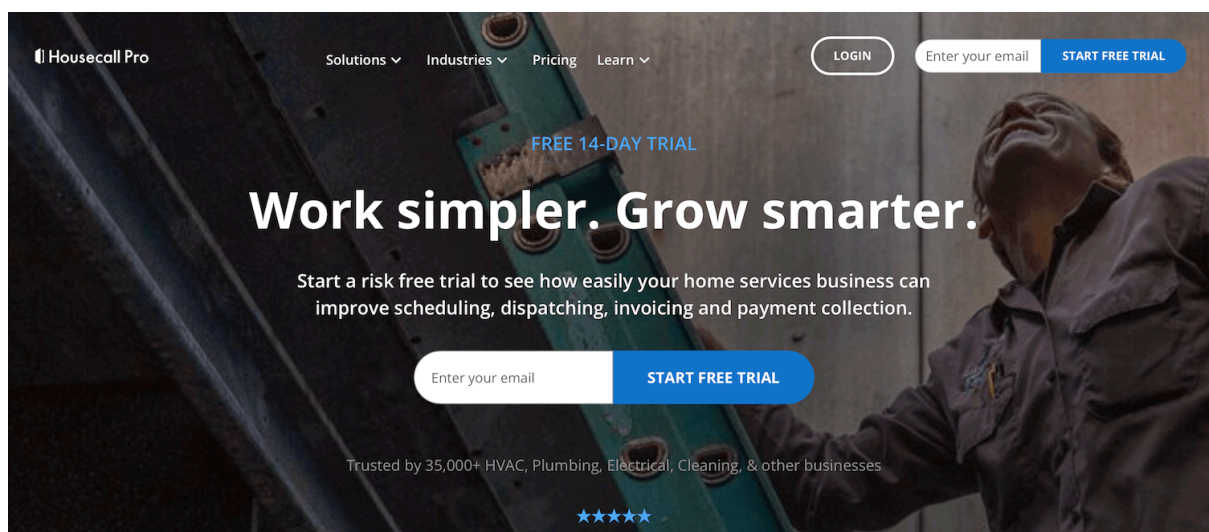

[Source: Housecall Pro homepage]

[Housecall Pro](#) is an all-in-one service tool that helps electrical contractors run their entire business from their smartphone or from their web portal. This solution supports all aspects of the workflow, including job scheduling, dispatching, customer database, invoicing (including QuickBooks Online), and payment processing.

Housecall Pro is competitively priced and is best suited to businesses with one to 30 employees.

## Jobber
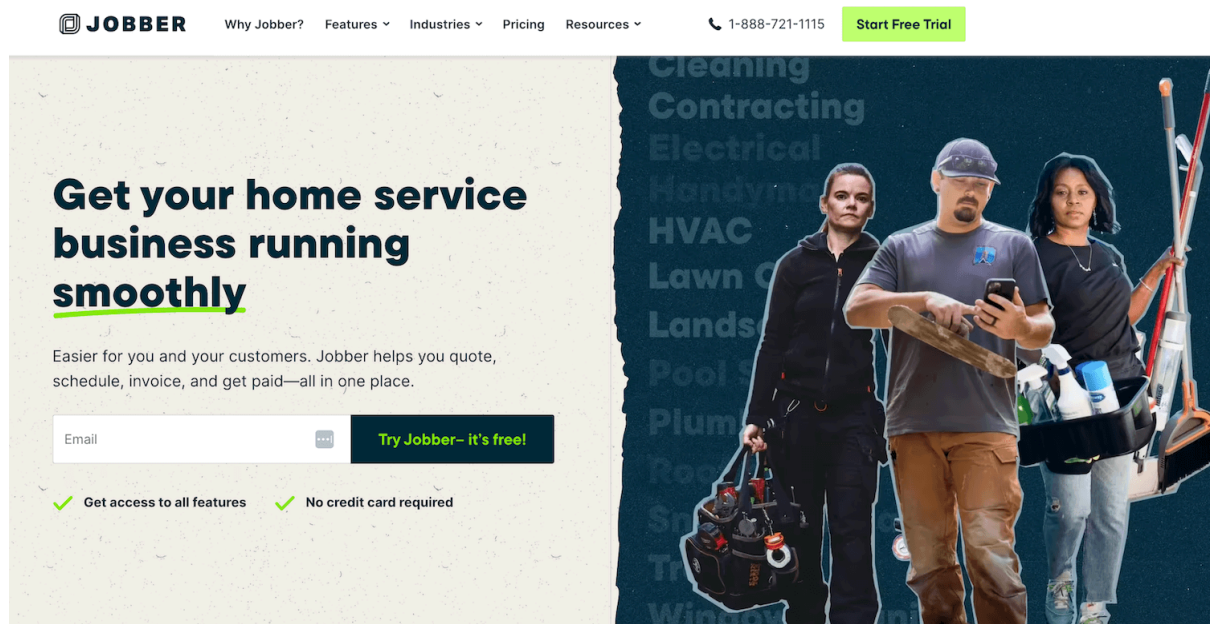


[Source: Jobber homepage]

[Jobber](#) helps home service businesses (including plumbing companies) provide a seamless customer experience and keeps jobs on track, from the customer's request through to payment.

Jobber is customizable to fit your process, so you can schedule jobs, optimize routes, send quotes and invoices by text, and get paid on-site via the software's mobile app. Jobber is popular with small businesses that want a simple, easy-to-use solution.

Simpro
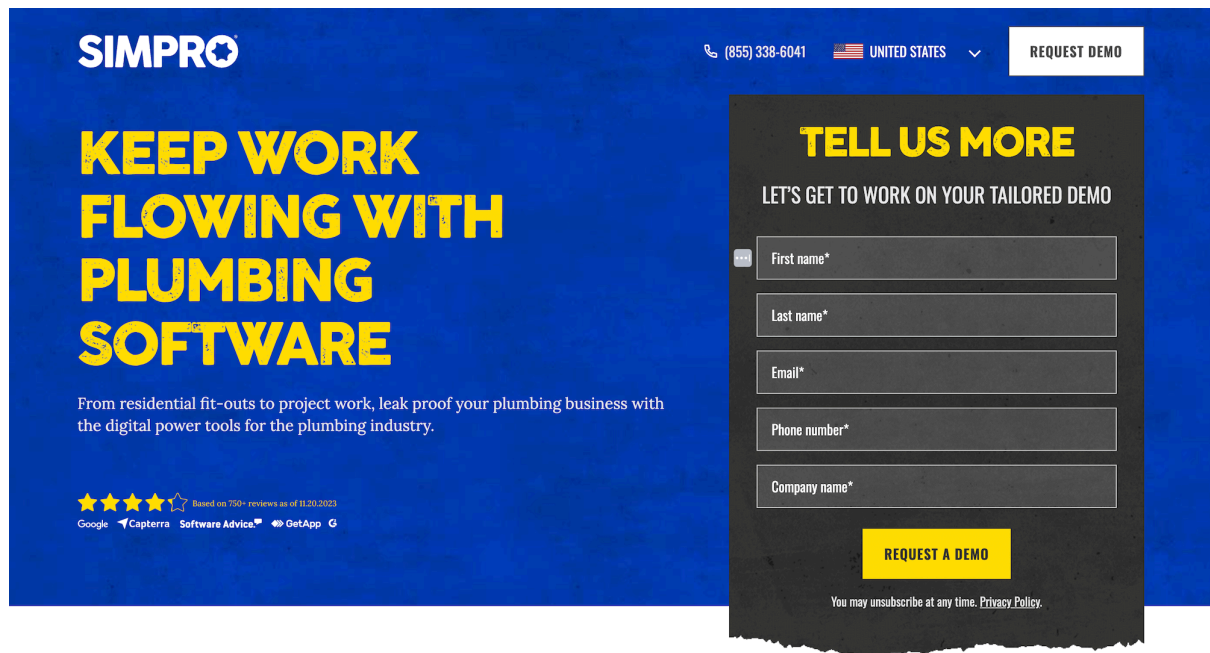


[Source: Simpro homepage]

Simpro is a powerful job management software solution that lets you track multi-stage projects from start to finish. The platform automates tasks for dispatching, scheduling, and inventory management, as well as detailed financial reports.

Simpro connects office operations with plumbing techs in the field with Simpro Mobile and integrates with QuickBooks and Xero to help with accounting tasks, too.

SmartServ
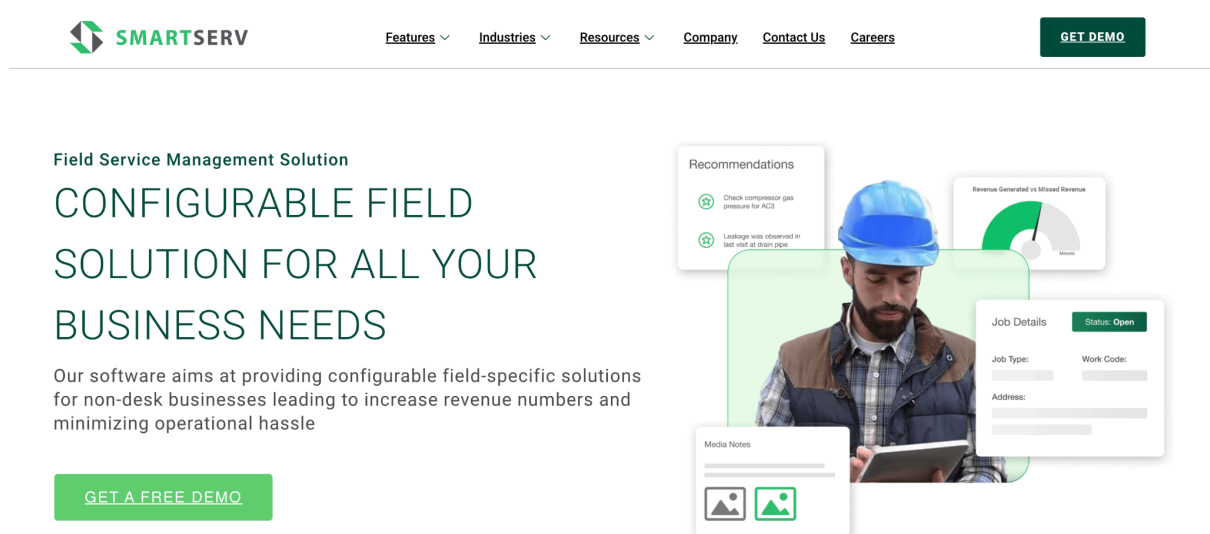


[Source: SmartServ homepage]

SmartServ is a cloud-based field service management software for plumbing businesses, as well as HVAC and electricians. Its features include real-time notifications, dispatch, contact management, customizable reports, and analytics.

The software lets users allocate jobs according to skills and availability, as well as handle payments and generate estimates and invoices. SmartServ also offers an inventory management module that helps with order fulfillment.

## Try ServiceTitan's Plumbing CRM Solution

As the plumbing industry continues to embrace tech-forward solutions, it's becoming harder for contractors to stay competitive without the right tools. A CRM is no longer just "nice to have" — it's becoming **essential** for managing customers, optimizing operations, and growing revenue.

But not all CRMs are created equal. Choosing a general-purpose CRM often leads to extra complexity, forcing you to juggle multiple disconnected tools or rely on clunky add-ons. The result? More frustration, wasted time, and limited visibility into your business.

With ServiceTitan's all-in-one plumbing software, you get a **CRM built specifically for contractors** — one that seamlessly integrates customer management with everything else that keeps your business running smoothly:

- **Scheduling & dispatching**
- **Job management & invoicing**
- **Inventory tracking**
- **Marketing & sales tools**
- **Customer communications**

By consolidating these workflows into one powerful platform, ServiceTitan helps plumbing contractors **work smarter, deliver better service, and grow faster**.

*If you'd like to learn more about how ServiceTitan can help your plumbing business become more efficient and grow revenue through improved customer relationships, schedule a call today.*