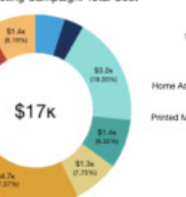
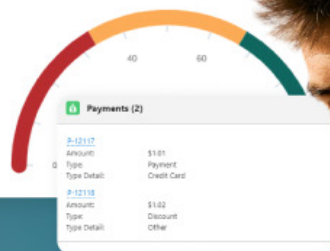




Still Have Questions?

Here's Everything You Need to Know Before Choosing improveit 360



Built for Remodelers. Designed for Growth.

At the mid-market and enterprise level, remodeling companies face complex sales cycles, high lead volumes, and the need to streamline operations for scalable growth. While generic CRMs may offer basic features, they rarely address the unique workflows remodelers depend on.

improvet 360 was built for this industry. Powered by the Salesforce platform, it's engineered to help you manage more leads, optimize your team's performance, and grow revenue with fewer manual headaches.

This FAQ answers the most common questions we hear from business leaders — so you can evaluate improveit 360 with total confidence.

General Questions About **improveit 360**

Q: What is **improveit 360**, and how is it different from other CRMs?

improveit 360 is a CRM platform purpose-built for the home improvement and remodeling industry. Unlike general-use CRMs, it's designed around your real-world sales workflows, lead management challenges, and operational needs. Built on Salesforce, it combines industry-specific functionality with enterprise-level scalability and security.

Q: Who is **improveit 360** designed for?

improveit 360 is purpose-built for **mid-sized to large remodeling companies** — typically managing multiple teams, thousands of leads annually, and complex, high-value project pipelines.

We've found that organizations with over 50 users tend to have the most success, where the infrastructure, team size, and operational demands align with the full capabilities of our CRM. We've also found that companies at this scale are best positioned to implement, maintain, and get long-term ROI from the system.

Additionally, teams see the most success when they have a **dedicated CRM champion** — someone who knows your business inside and out and can lead the strategy, configuration, and adoption of the platform. For smaller businesses, the resource investment required may outweigh the benefits, and we want to ensure every customer gets the most from their CRM.

Pricing

Q: How is pricing structured?

Pricing is based on your team size, number of users, and the specific features your organization needs. We offer scalable pricing designed to support growing companies, with no hidden fees.

Q: Is there a free trial?

Due to the level of customization required, we do not offer a self-service trial. Instead, we provide a **personalized demo experience** tailored to your team's structure, use cases, and business goals.

Implementation & Integration

Q: What does the onboarding process look like?

The full implementation timeline typically spans **12 to 14 weeks**, depending on your business's structure and system complexity. Within that, the training portion of onboarding usually takes **4 to 8 weeks**.

From day one, you'll be supported by a **comprehensive implementation team** dedicated to your success. Throughout the process, we'll work closely with you on **system configuration, data migration, user training, and go-live planning**.

To deliver a system that truly fits your business, your ongoing engagement is essential. Active collaboration ensures we tailor improveit 360 to meet your goals and integrate seamlessly with your operations.

Q: Can improveit 360 integrate with our current tech stack?

Yes. improveit 360 offers a wide range of integrations designed to support remodelers, including:

- **Quoting tools** like OneClick Contractor
- **Call center platforms**
- **Calendar systems**, including Google Calendar and Outlook
- **Marketing automation tools**
- **Accounting software**, including QuickBooks*
- **Financing and payment solutions**
- **Open API capabilities** for building custom connections

**QuickBooks integration is available out-of-the-box for users on improveit 360 Classic. For other versions, a third-party connector such as DBSync is required to enable the integration.*

Q: What type of training and support do you offer?

Our training program blends live instruction with flexible self-led learning. We provide:

- **Guided onboarding sessions** with implementation experts
- **Self-paced learning via the improveit 360 Academy**
- **Role-based training** for sales, operations, and admin teams
- A library of **documentation, how-to videos, and self-serve resources**
- **Ongoing support** from your dedicated Customer Success team

We're committed to making sure your team feels confident every step of the way.:

Scalability & Customization

Q: Will improveit 360 scale with our business?

Yes. Whether you operate in one market or multiple regions, improveit 360 grows with you. You can add users, locations, and custom reporting as your business evolves—backed by Salesforce’s enterprise-grade infrastructure.

The platform receives 4 to 8 product updates per year, continuously evolving to meet your needs.

Q: Can we tailor the system to fit our processes?

Absolutely. You can customize your:

- Sales workflows and pipelines
- Dashboards and performance metrics
- User permissions and visibility
- Communication templates and reporting outputs

Scalability & Customization

Q: How is our customer data protected?

improveit 360 follows enterprise-grade security protocols, including:

- Encrypted data storage
- Secure, cloud-based infrastructure powered by Salesforce
- Regular security updates and audits

Your data is hosted securely and backed up to prevent loss or breaches.

Q: Do we own our data?

Yes. You retain full ownership of your data. You can export customer records, reports, and performance metrics at any time.

Final Considerations

Q: What happens after we become a customer?

You'll begin with a dedicated **implementation team** to guide onboarding, data migration, and training. After go-live, you'll transition to our **support team**, where a **dedicated relationship manager** will be your main point of contact.

We provide:

- **Regular check-ins** and system optimization reviews
- **Best-practice guidance** for your evolving needs
- Continued access to documentation, videos, and help resources

Q: What kind of ongoing support is available?

You're backed by a reliable and responsive support system:

- **Live phone and email support** from our U.S.-based team (Mon–Fri, 9am–6pm ET)
- **24/7 access** to our knowledge base and training library
- **A dedicated relationship manager** focused on your long-term success

We're here when you need help—whether it's a quick fix or strategic insight.

Q: What if we run into issues or concerns?

We build **satisfaction checkpoints** into the onboarding process to make sure everything stays on track. If concerns arise at any point, we'll work directly with your team to resolve them quickly—with transparency, responsiveness, and a commitment to your success.

What's Next?

See it in Action:

Schedule a Personalized Demo to see how improveit 360 fits your business

[Schedule a Demo](#)