eBook

12 CRM Reports Every Home Improvement Business Should Run Before the New Year

improveit 360
by EverPro

It's not about having more data.
It's about having better insights.

We measure everything nowadays. But without context, data can distract or mislead more than it helps.

So how can you distinguish between the superfluous and the significant?

How can you be sure that the reports you're running are more than just numbers on a page, and instead are catalysts for informed decision making and strategic planning?

Through hours of research, consultations with our customer success teams, and in-depth interviews with customers themselves (the real experts here), we've compiled a list of the 12 most impactful CRM reports and real-life examples to demonstrate their impact.

These reports are tailored to address key areas of your remodeling business, providing you with actionable insights to improve efficiency and increase revenue.

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1. Prospects by Market Segment

Data Interpretation: Look for trends in customer demographics and preferences. For instance, if you notice an increase in prospects from high-income segments, consider tailoring luxury remodeling packages to this group.

Case in Point: Homeowners with higher incomes and home values invest more in major remodels than other households. This is particularly true for kitchens and bathrooms. If your reports reveal a rise in leads from affluent ZIP codes, that's a strong signal to tailor your offerings toward premium remodeling projects.

2. Lead Source Performance

Data Interpretation: Analyze which marketing sources (social media, referrals, etc.) provide the highest ROI. If a source's cost per lead is high but the conversion rate is low, it might be time to reassess this channel.

Case in Point: Data from GetTheReferral shows that traditional advertising can cost home improvement companies $150–$300 per lead, while referral-generated leads cost far less and convert around 30% higher on average. Shifting budget toward referral and digital channels helps home improvement businesses achieve stronger ROI and steadier lead flow year-round.

3. Quotes - Expiring Next 7 Days

Data Interpretation: Prioritize follow-ups on quotes that are about to expire. By highlighting and acting on high-value, time-sensitive opportunities, you increase the chance of securing commitments.

Case in Point: According to SMP, home improvement businesses that focus on expiring bids and quotes (supported by automated reminders and structured follow-ups) see up to a 30% increase in close rates. Tracking near-expiration quotes helps sales teams secure commitments before opportunities go cold.

4. Sales Efficiency by Rep

Data Interpretation: Identify your top performers and those who may need additional support. Use these metrics for targeted coaching, replicating successful strategies across your team.

Case in Point: Data shows that businesses which complement training with structured tools and coaching can achieve up to a 65% improvement in sales performance. Home improvement teams can apply this by tracking rep-level metrics and investing in targeted training and follow-up tools.

5. Source Cost Performance

Data Interpretation: Calculate the true cost of acquiring a customer from each source. Focus on channels with lower costs and higher sales conversions.

Case in Point: Companies that compare their cost per lead across channels often find traditional print ads among the most expensive, sometimes topping $150 per lead. Shifting more budget toward digital and referral programs can reduce acquisition costs and boost overall margins.

6. Projects Completed Not Yet Paid in Full

Data Interpretation: Track outstanding balances for completed projects to monitor cash flow. Prioritize collections based on both the age and the value of the outstanding invoices to protect working capital.

Case in Point: By narrowing in on receivables tied to completed jobs and accelerating follow-ups, home improvement businesses can improve their cash flow. For example, companies that adopted standardized collections processes reported reduced days sales outstanding (DSO) and released more working capital.

7. Appointments Performance Year Over Year

Data Interpretation: Compare performance across years to gauge growth and identify cyclical trends.

Case in Point: Home improvement companies regularly observe seasonal dips in appointments, especially during colder months. By launching targeted off-season campaigns, businesses have been able to maintain momentum and increase engagement during slower periods.

8. Marketing Opportunities by Type

Data Interpretation: Identify which marketing activities complete at the highest rate (digital campaigns, direct mail, etc.) and allocate resources accordingly for the best results..

Case in Point: A study by Sendoso found that campaigns combining direct mail with digital assets are 27% more likely to deliver top-ranking sales performance and 40% more likely to achieve top-ranking acquisition levels.

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9. Customer Feedback Report

Data Interpretation: Use customer satisfaction data to track quality, service consistency, and communication effectiveness. Focus on the feedback from project completion surveys to improve processes and client experience.

Case in Point: A report by Gitnux shows that [59% of homeowners said clear communication during projects impacts their overall satisfaction](#), and 66% said that follow-up after completion affects their willingness to hire the contractor again. Home improvement businesses applying these insights can improve project communication and timely follow-up, boosting customer satisfaction and referral potential.
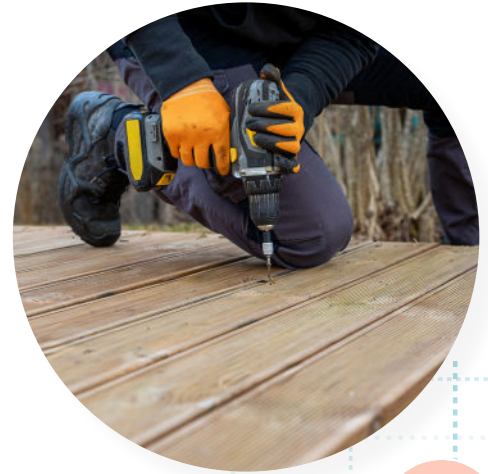
10. Sales by Month by Rep YTD

Data Interpretation: Track monthly sales by each rep year-to-date to identify performance patterns, highlight inconsistencies, and inform strategic training or resource allocation.

Case in point: [According to Training Industry](#), companies that apply targeted training and track KPIs like win-rate and revenue per rep can demonstrate measurable improvements in rep performance.

11. Campaign Performance Dashboard

Data Interpretation: Visualize real-time performance of your marketing campaigns to identify which are converting leads into sales, and double down on what works.

Case in Point: High-performing digital campaigns can outperform traditional efforts by large margins. For example, [benchmark data](#) shows many campaigns achieving conversion rate lifts well above standard averages, highlighting the value of tracking and optimising each campaign.

12. Call Center Performance Dashboard

Data Interpretation: Use a dashboard to monitor metrics like agent productivity, conversion rates, and training needs. Identify under-performing agents and adjust training or staffing accordingly.

Case in point: Tracking key call-center KPIs (such as average handle time, first-call resolution, and agent adherence) enables targeted coaching and performance improvement. [Businesses that monitor and act on these metrics](#) can boost appointment-setting and conversion rates.

Never Stop Improving

These reports are designed to provide remodeling businesses with the insights needed to make informed decisions that drive efficiency and profitability. By integrating these reports into your business strategy, you can ensure a comprehensive understanding of your operational dynamics and identify market opportunities.

We're Here to Help You Build Better Reports

improveit 360 is a fully customizable CRM built on the Salesforce platform. Built for home-improvement companies, delivering predictable results and reports with actionable insights about your operations, customers, and profits.

We've helped our clients, their teams, and their customers stay connected since 1999. Now, we're ready to help you future-proof your business for 2026 and beyond.

Learn more or schedule a demo today.

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