7 WAYS TO KNOW IF DUBSADO IS RIGHT FOR YOU

DUBSADO IS AN AMAZING CRM SYSTEM BUT IT ISN'T FOR EVERYONE. LET'S MAKE SURE IT IS A GOOD FIT FOR YOU.

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Dubsado is one of the fastest growing CRMs out there, and for good reason.

It offers everything you want and need for your business back office, but while absolutely amazing and in my opinion the best CRM out there, it is not made for everyone.

I created this guide to help you figure out if this is the CRM for you and whether or not you should make the investment in time and money.

Let's Dive In!

Stephanie

What are you using to keep track of your clients?
Having a CRM is so important. I hope you aren't using an excel sheet to keep your clients' information organized like some of my clients. Please, before disaster strikes, invest in a CRM that has systems in place to keep your information safe.

1

CRM

2

Scheduling Platform

Did you know that Dubsado has a built in scheduling system? If you don't have a scheduling system in place, first you need one, second Dubsado has an amazing one that you can use to send clients to setup appointments. Send your scheduling link and look professional. If you already have a system in place why have multiple systems, why not have an all-in- one?

Do you have a seperate system you are using to have your documents signed? With Dubsado you can create contracts and subcontracts and receive digital signatures like you would in other platforms. They will also store in the clients project so everything stays organized.

3

Contracts

4

Forms

Are you creating forms and questionnaires? Dubsado allows you to do that AND you can make them look amazing and customized to your brand. Why not do it all in one program and keep it organized. You also have the capability to sort the completed forms by the clients so you aren't constantly searching.

You know you want to get paid. Making sure that you get paid when you send out the contract is ideal. Why not do it at the same time from the same email. You can do that from Dubsado. In fact you can create workflows that trigger invoices being created based on the job. Save yourself the time and energy of multiple platforms and stick with one.

5

Invoicing

6

Leads

Are you creating forms and questionnaires? Dubsado allows you to do that AND you can make them look amazing and customized to your brand. Why not do it all in one program and keep it organized. You also have the capability to sort the completed forms by the clients so you aren't constantly searching.

If you are having a hard time keeping your clients projects organized, then look no further. With the projects feature you are able to keep everything for that clients "project" organized all in one place. Their contract, invoices, forms, appointments, and more involving that project are all in one spot. AND you can have multiple projects with multiple contracts for one client. So amazing!

7

Organization

Is Dubsado the right fit for you?
Then click the button below and save 20% on your first month or even better your first YEAR.

Sign up here!

- For 1:1 support schedule a FREE Clarity Call
- Click here to join my community