BENCHMARK ENTERPRISE SYSTEMS

From first search.
Through the entire sales lifecycle.

Connect the customer journey from first search to repeat business: useful websites, protected records, company-specific estimating and controlled follow-up, with a clear role for each application.

Product and feature review: November 6, 2026

Choose one service or a connected configuration. Website packages, software subscriptions and optional enhancements have separate scopes. Features, permissions, integrations, automation and live delivery are confirmed and tested for each customer before activation; this overview is not a claim that every connection is enabled on every site.

Start with the service your business needs. This overview explains the connected workflow. Current product pages and your accepted agreement define pricing, inclusion and activation.

Get found

Local Boost and accurate business information.

One approved business identity

Benchmark Local Boost aligns names, addresses, phone numbers, hours, services and website links across selected business listings and location pages. Accurate information helps customers reach the right team and gives search systems clearer evidence about the business.

Local visibility and reputation

Selected services cover listing setup and corrections, duplicate cleanup, review support and visibility monitoring. Multi-location businesses retain distinct local records within a consistent company identity. Submitted changes, pending verification and confirmed publication are reported separately.

Local Boost services

Help customers choose

Products, projects and answers connected to the next conversation.

Custom websites with consistent business data

AI-assisted development, custom code and business-specific configuration connect the visible website with accurate metadata, applicable structured data, location records and inquiry destinations. Shared records reduce repeated entry; validation checks the published result.

Products, projects and Knowledge Center articles

Products connect to relevant project examples and guidance. Projects connect to verified products or material categories, useful articles and the responsible location. Articles link answers back to relevant choices and examples. Exact product relationships use approved facts.

Project Center and local reach

Completed work becomes searchable evidence with photographs, materials and actual job locations. Town galleries and approved service-area pages connect customers to relevant nearby examples. More distinct, well-documented projects broaden useful coverage across services, materials and communities; search engines determine indexing and rankings.

Salesperson assisted project growth

Authorized employees submit completed work from a phone or desktop for administrative approval. The workflow supports optimized images, metadata suggestions and required photo descriptions. Approved records supply page information and structured data; publishing maintains sitemap coverage. Staff confirm facts and image permissions.

Enhanced Plus and customer tools

Enhanced Plus builds on Essentials and Enhanced with a searchable Knowledge Center, a branded NextStep experience and expanded launch listings. The website feature set can include curated Options & Inspirations, product search and filters, saved selections, comparisons, material guidance, planning resources, related services, location search and location pages.

Keep context when customers ask for help

Supported product, project and article links retain the selected location and relevant context in Ask an Expert and contact paths. NextStep offers a direct contact route or an agreed guided experience. Approved promotions can remain accessible through an expiring specials banner.

Add selected features to an existing website

Supported methods include native CMS implementation, embeds, APIs, connected hosted sections and prepared publishing packages. Compatibility and provider access determine the method. Shared project planners, service-area checkers, live catalogs, inventory, checkout and visualizers are separately scoped.

Enhanced website guide

Website packages

Manage the opportunity

Protected records preserve the customer relationship.

From inquiry to CRM

Connected contact forms, Ask an Expert and NextStep carry the request, selected location and supported browsing context into the sales process. Customer matching helps associate activity with an existing record. Benchmark CRM organizes opportunities, responsibility, tasks, notes and history.

Assignment and cross-location coordination

Sales Rotation applies approved location, category, eligibility and availability rules. Configured customer recognition alerts help authorized staff identify existing relationships at another location before duplicate opportunities or conflicting follow-up develop. Duplicate checks include contact details and normalized name variations; possible matches require staff review and do not automatically merge or reassign customers. Reassignment follows company policy.

Sidekick and Pulse

Sidekick prepares authorized customer summaries, call briefings, project questions and follow-up drafts for staff review, alongside daily and permitted manager attention briefings. Pulse reports recorded traffic, appointments, estimates, sales, profit, collections and follow-up performance under company, location and staff permissions. AI configuration and selected scope must be verified; external campaign attribution, operating expenses and commissions are not connected.

One identity, defined responsibilities

The protected customer database supplies the shared identity foundation. CRM manages the relationship, Quick Quote manages estimates and Re/Engage manages configured communication workflows. Company, location and role permissions govern access; public project stories remain separate from private records.

One place to work

Benchmark Workspace is the staff entry point for assigned applications, authorized company and store context, daily work and permitted demo links. RLS means Row-Level Security: CRM database rules restrict individual records by company, authorized location and staff role. Salespeople access assigned work; managers and administrators receive the broader access their roles allow. These rules apply to record access, alongside application permissions. Other connected applications retain their own access controls. Customer Concern Alerts bring issues to the responsible team. Workspace access does not activate email delivery or change subscription capacity.

CRM and business applications

Prepare the proposal

Quick Quote and the protected Core estimation engine.

Fast, accurate and complete quotes

Benchmark Quick Quote is designed to reduce estimating errors, prevent missed charges and help protect margins. It supports company-specific workflows for carpet, tile, hardwood, LVP, countertops and showers. Correct inputs, approved pricing and salesperson review remain essential.

Benchmark Core: custom-coded estimation engine

Core performs protected calculations using approved products, material prices, labor rates, minimums, accessories and estimating rules. Configured logic covers relevant measurements, coverage, waste, carpet widths, preparation and installation quantities. Quick Quote provides the workspace; Core performs the calculations.

AI-assisted work scope analysis

AI helps organize job notes and identify questions or potentially missing scope. Staff confirm measurements, selections and installation requirements, select company-specific products and labor, compare options, and save the reviewed quote.

Keep the proposal with the opportunity

The saved, authoritative quote version links to the matching customer and CRM opportunity. CRM retains responsibility and next actions; Re/Engage supports the configured follow-up. Authorized quotes are accessible from CRM and standalone Re/Engage customer files. Verified customer access supports acceptance or requested changes for the exact quote version. Sharing, opening and response activity supports follow-up; an open can be an automated preview. Quote acceptance alone does not record a sale, payment or signed contract. RFMS integration remains a potential separately scoped connection. Scope and onboarding are confirmed before activation.

Quick Quote scope

Follow through

Customizable Re/Engage automation across the sales lifecycle.

Business control over automation

Benchmark Re/Engage connects authorized customer information and sales or project milestones to configured workflows. The business controls message content, timing, intervals, responsible staff and approval requirements. Staff can adjust, pause or cancel workflows within their permissions. Replies, opt-outs and status changes govern future communication.

Sales follow-up

Staff-reviewed inquiry acknowledgments, proposal follow-up and next-action reminders help prevent overlooked opportunities. Quote follow-up uses days 2, 7, 14 and 30, then every 30 days. Save for Later uses the selected date. A 90-day reconnect uses the most recent verified meaningful customer interaction; uncertain dates require staff review. Replies, proposal responses and changed commitments can hold obsolete drafts. Outbound email remains disabled pending sender setup and delivery testing.

Appointments and project communication

Appointment and pickup reminders, preparation instructions, installation checklists and milestone messages clarify what happens next and help reduce missed appointments and preventable preparation problems.

After-sale care

Check-ins, care guidance, warranty follow-up and review requests support the relationship after completion. Concern alerts help staff address issues, while recurring contact supports referrals and repeat business.

Managed Bulk Email Targeted Campaigns

Managed Outreach provides audience preparation, personalized content, approval, scheduling, follow-up sequences and results reporting for approved audiences. Sender setup, reply handling, suppression and opt-out controls govern delivery. Lead sourcing and additional campaign work are separately scoped.

Re/Engage and Managed Outreach

Verify and improve

Evidence, corrections and dated verification.

Audits establish priorities

Reviews cover website presence, local visibility, AI visibility, UI/UX, customer journeys, accessibility screening, analytics, privacy/security/trust screening, competitive positioning and migration preservation. Findings separate confirmed defects, recommendations and unavailable evidence.

Phased validation and repair

Business/data review, development review, prelaunch checks and production verification address different requirements. Numbered reports record the release, coverage, evidence, corrections and open items. Authorized repairs are retested; a working interface alone does not prove complete routing or delivery.

Certification with a defined scope

Benchmark certification records which checks the identified version passed, with the date, scope and exceptions. A seal points to the corresponding verification record. It is not a guarantee of rankings, sales or comprehensive legal, accessibility or security compliance. Material changes require appropriate retesting.

Customer ownership and ongoing care

Customer-controlled accounts, documented handoff and selected support arrangements establish ongoing responsibilities. Maintenance and monitoring are optional services defined in the agreement.

Audits and assessments

Launch verification