GUIDE TO SELECTING
SERVICE MANAGEMENT SOFTWARE
(THAT KEEPS ACCOUNTING HAPPY)

You know it's time...

You need to purchase software to help streamline your services department. And, as tempting as it is to throw away your current system in search for the perfect all-in-one, transitioning away from your existing core financial system is risky. Why change what works for your construction division and back office just to solve the problems in your service department?

Instead, you need service management software that will work well with your current accounting system. This leaves you with two options:

1. An add-on service module to your accounting software

2. A stand-alone application that integrates with your accounting software

This guide will walk you through five questions to ask when evaluating these two options and selecting service management software for your business.

Are you ready to expand your company's software beyond your accounting system and provide your service department with the technology they need? Want to avoid the risks that come with changing your core accounting system? This is the guide walks you through the five questions to ask when selecting service management software for your business

1 Whose needs are driving the decision?

2 Can service management software get accounting the information it needs?

3 How will service management software help you meet and exceed customer expectations?

4 How will service management software help you make money?

5 How will service management software give you a competitive advantage?

Keep reading to understand the importance of each of these questions.

QUESTION 1:
WHOSE NEEDS ARE DRIVING THE DECISION?

If you've read the **blog post** that accompanies this guide, you already know the answer to this question is your customers. Traditionally, you've prioritized the needs of your accounting department when making technology decisions because your accounting software has been the most important system in your business. This approach is short-sighted when selecting a service management application. Yet, many commercial service contractors fall victim to this way of thinking.

The good news is you can adopt service management software that keeps your accounting department happy (see question #2), and also prioritizes your customers - the group of people whose needs must be driving your software selection decision.

Make your customers' needs the north star that guides your decision-making process.

QUESTION 2:
CAN SERVICE MANAGEMENT SOFTWARE GET ACCOUNTING THE INFORMATION IT NEEDS?

Just because you are prioritizing your customers doesn't mean you have to leave your accounting department (or its software) in the lurch. Accounting needs to know how much it costs to deliver service so they can build an accurate invoice. Therefore, the accounting system must receive the following:

◉ AP to inventory transactions (What is the value of the parts I've purchased?)

◉ Inventory to COGS (What is the value of the parts I used on the work order?)

◉ Labor/payroll COGS (Who applied labor to the work order?)

◉ Invoices revenue (What am I charging?)

Many of the add-on modules that claim to help with service management are really just glorified accounting data collectors. They may collect and communicate this information, but that's where their benefits end. Service management software, whether a stand-alone application or an add-on module, should have this functionality. But this functionality is only table stakes to be in the running for consideration.

Let's look at other questions you should ask during the evaluation process.

QUESTION 3:
HOW WILL SERVICE MANAGEMENT SOFTWARE HELP YOU EXCEED CUSTOMER EXPECTATIONS?

If the only documentation you are sending your customers after a service appointment is an invoice, you can bet you are not exceeding their expectations. Put yourself in your customers' shoes. What information do they need at different points in the service cycle?

Ask these questions to assess customer service functionality:

- Can you send notifications like due for service reminders, appointment reminders, and tech en route notifications?

- Can your customers access service history online?

- Can your customers clearly see what your tech did because there are pictures and videos on each service record? (And not buried in an invoice.)

- Can your customers receive notifications about potential issues when a service is complete?

- Can you send quotes to customers online that include pictures, videos, and approval at the click of a button? (As opposed to having to print, sign, scan, and email back their response.)

Look for functionality in service management software that automates and improves communication (not to mention improving peace of mind) with your customers.

The fastest way your service management software can make you money is by turning equipment issues identified in the field into approved quotes. Service management software can streamline each step of this process, from identifying and documenting repairs, to quoting, to quote approval, and scheduling new jobs. But improvements in the quoting process aren't the only way to realize ROI.

Ask these questions to assess potential return on your investment:

◉ Can techs show evidence of equipment risks through photos and videos and make recommendations?

◉ Can sales send quotes to resolve identified equipment issues to customers quickly? (Because there is no delay waiting for paperwork, or paperwork getting lost.)

◉ Can quotes be approved online by the customer?

◉ Can approved quotes automatically turn into new jobs to be scheduled? (And not fall through the cracks.)

◉ Does it collect and organize your data into easy-to-understand reports that show ways to improve your business?

◉ Can customers access service information via an online portal? (Saving your staff interruptions and time spent fielding and returning phone calls.)

At the end of the day, this is what it boils down to. Another way to frame this question: **Would you be worried if your competitors used this software?**

Beyond improvements in customer experience and back office productivity, software can help with recruitment and retention of technicians, building customer loyalty and retention, and offering your company a differentiator beyond the lowest price, which is always a losing game. **How will your service management software help you rise above your competition?**

> A study of 250,000 quotes shows that customers approve online quotes with photos and a one-click approve button at 3x the rate of quotes sent as email attachments.

CONCLUSION

Are you ready to expand beyond your accounting software (without leaving it behind)? Are you ready to use technology to build long-lasting customer relationships? **Schedule a demo today** to see how ServiceTrade can meet and exceed the expectations of everyone important to the success of your business from your customers, to techs, and accounting.

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Durham, NC
919-246-9900
www.servicetrade.com