

### How to Use This Tool

This spreadsheet is a tool to help you evaluate your field service software. To get the most out of this tool, we recommend doing the following:

- 1 Request a live product demonstration of each software you are considering.
- 2 Use the scoresheet to guide your questions.
- 3 Have each person from your company that will use the software take part in the demo and fill out their own scoresheet.
- 4 Compare scores at the end. Discuss areas where your scores differ.

### Key Features to Focus On

- 1 Built specifically for commercial contractors.
- 2 Firm financial backing with consistent innovation.
- 3 Technology roadmap that supports the future of your business.
- 4 Cloud-based platform with unlimited data storage.

Rating Scale	
4	Excellent / Preferred
2	Acceptable / Standard
0	Not Adequate

			BUILDOPS	SOFTWARE #2	SOFTWARE #3	SOFTWARE #4
Basics	Long Term Security	4	High growth. Company has received multiple rounds of investor capital to reinvest into the product (or has been around for a long time, but continues to innovate).			
		2	Medium growth. Company has received investor capital within the last year to reinvest into the product.			
		0	No growth/Negative. No investor backing and slow or negative cash flow (or has been around for a long time, but fails to innovate).			
	Technology Roadmap	4	Planned feature and functionality development align perfectly to the needs of your company.			
		2	Feature and functionality somewhat align with your needs. Some features missing.			
		0	Planned feature and functionality development do not align with your needs. Many major features missing.			
	Cloud-based platform	4	Software is fully cloud-based and has unlimited data storage.			
		2	Software is on-premise with an option for adding hosted services.			
		0	Software is on-premise only.			
	Maintenance Costs	2	Maintenance included in price of software.			
		0	Maintenance fees/plans are in addition to software cost.			
	Mobile App	4	Intuitive mobile experience: offline mode, complete work order management, ability to attach PDF/photo/video to jobs, mobile signature.			
		2	Internet required. Not user-friendly, but able to use workarounds to get the required job data.			
		0	Poor user experience, issues with data accuracy or lost info, problems syncing with back office.			

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Critical Functionality	Service Agreements	4	Comprehensive service agreement management with ability to auto-create visits, provide asset-level analysis of work performed, and maintain accurate records of all contracts.			
		2	Limited functionality; hosts service agreement records, but no automation to streamline management of them.			
		0	No service agreements module, must be managed ad hoc or off-platform.			
	Job Costing	2	Instant and detailed visibility into profit margins across all jobs and projects.			
		0	Limited to no job costing functionality, difficult to use, or lack of detail.			
	Built-In Quoting	4	Full quote and proposal management built into the platform, including version history, custom templates, and mobile access.			
		2	Limited quoting functionality.			
		0	No built-in quoting functionality; additional software required.			
	Scheduling + Dispatching	4	Intuitive scheduling; ability to perform all dispatch duties from one screen.			
		2	Dated interface, but adequate functionality.			
		0	Minimal focus on scheduling/dispatching; poor user experience.			
	Invoicing	2	Mobile invoicing, e-signature, automatic sync with accounting software.			
0		Double entry required; no electronic invoicing or difficult to use.				
Project Management	4	Comprehensive PM module with live KPI and budget tracking, weather tracking, and dynamic scheduling based on labor needs/capacity.				
	2	PM module with limited features/functionality.				
	0	No project management module.				
User-Friendly Functionality	Intuitive design for easy navigation and usability	4	Extremely easy to navigate between screens and find records/information/features quickly.			
		2	Some frequently used features/information require 3+ clicks to get to.			
		0	The most frequently used features/information require 3+ clicks to get to.			
	Automated and gated workflow capabilities	2	Software provides a clear path for entering job information and restricts going outside that path.			
		0	Software does not have controls to prevent job detail from being left out.			
	Universal Search Bar	2	Ability to navigate quickly to needed information (customer name, door code, custom form, etc.) with universal search bar.			
		0	No built-in search bar.			
	Built-in optical character recognition (OCR)	2	Software has OCR functionality for asset management.			
		0	Software does not have OCR functionality.			
	Speech-to-text transcription	2	Software has speech-to-text transcription.			
		0	Software does not have speech-to-text transcription.			

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<b>Customization</b>	<b>Custom Forms</b>	<b>2</b>	Software has custom forms (used for safety checklists, refrigerant tracking, etc.).			
		<b>0</b>	Software does not have the ability to create custom forms.			
	<b>Reporting</b>	<b>4</b>	Fully customized reporting.			
		<b>2</b>	Limited pre-built reporting.			
		<b>0</b>	No reporting capabilities or reporting is difficult to manage.			
	<b>Integrations</b>	<b>4</b>	Software integrates with my other platforms (e.g. accounting software, pricebook, etc).			
		<b>2</b>	Integrates with my accounting platform, but not some of my other software.			
		<b>0</b>	Does not integrate with my accounting platform.			
	<b>Multi-Tenant Functionality</b>	<b>2</b>	Allows me to manage multiple customer locations under a single account.			
		<b>0</b>	Does not allow multiple locations under single customer account.			
<b>Support</b>	<b>Comprehensive Implementation</b>	<b>4</b>	Implementation cost includes data migration, setting up customized layouts for my business, and initial training.			
		<b>2</b>	Implementation includes data migration and training only.			
		<b>0</b>	Implementation only includes data migration or training.			
	<b>Required Training</b>	<b>2</b>	Training is included as part of monthly software cost.			
		<b>0</b>	Additional training for new employees or new features is extra.			
	<b>Ongoing Support Cost</b>	<b>2</b>	Ongoing support is included as part of the monthly software cost.			
		<b>0</b>	Additional cost for ongoing support.			
	<b>Ongoing Support</b>	<b>2</b>	I will have a dedicated customer success rep			
		<b>0</b>	No dedicated customer success rep.			

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<b>SCORE TOTALS</b>				

**NOTES**

**What I Like Most:**

**What I Like Least:**

**Additional Questions:**