

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).	0	0	0	0
		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.	0	0	0	0
		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.	0	0	0	0
		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	0	0	0
		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.	0	0	0	0
		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.				

				BuildOps	Software #2	Software #3	Software #4
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.	0	0	0	0
		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	Limited to no job costing functionality, difficult to use, or lack of detail.	0	0	0	0
		0	Planned feature and functionality development do not align with your needs. Many major features missing.				
	Built-In Quoting	4	Full quote and proposal management built into the platform, including version history, custom templates, and mobile access.	0	0	0	0
		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.	0	0	0	0
		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	0	0	0
		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.	0	0	0	0
		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.	0	0	0	0
		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	0	0	0
		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	0	0	0
		0	No built-in search bar.				
	Built-in optical character recognition (OCR)	2	Software has OCR functionality for asset management.	0	0	0	0
		0	Software does not have OCR functionality.				
	Speech-to-text transcription	2	Software has speech-to-text transcription.	0	0	0	0
		0	Software does not have speech-to-text transcription.				

				BuildOps	Software #2	Software #3	Software #4
Customization	Custom Forms	2	Software has custom forms (used for safety checklists, refrigerant tracking, etc.).	0	0	0	0
		0	Software does not have the ability to create custom forms.				
	Reporting	4	Fully customized reporting.	0	0	0	0
		2	Limited pre-built reporting.				
		0	No reporting capabilities or reporting is difficult to manage.				
	Integrations	4	Software integrates with my other platforms (e.g. accounting software, pricebook, etc).	0	0	0	0
		2	Integrates with my accounting platform, but not some of my other software.				
		0	Does not integrate with my accounting platform.				
	Multi-Tenant Functionality	2	Allows me to manage multiple customer locations under a single account.	0	0	0	0
		0	Does not allow multiple locations under single customer account.				
Support	Comprehensive Implementation	4	Implementation cost includes data migration, setting up customized layouts for my business, and initial training.	0	0	0	0
		2	Implementation includes data migration and training only.				
		0	Implementation only includes data migration or training.				
	Required Training	2	Training is included as part of monthly software cost.	0	0	0	0
		0	Additional training for new employees or new features is extra.				
	Ongoing Support Cost	2	Ongoing support is included as part of the monthly software cost.	0	0	0	0
		0	Additional cost for ongoing support.				
	Ongoing Support	2	I will have a dedicated customer success rep.	0	0	0	0
		0	No dedicated customer success rep.				

	BuildOps	Software #2	Software #3	Software #4
Score Totals				

NOTES

What I Like Most:

What I Like Least:

Additional Questions: