Integration Evolution

Is fear of the unknown holding you back?
Why are we here today?

BTO is focused on helping contracting businesses run an efficient, effective, profitable business.
Operations

The processes and resources that businesses use to produce the high-quality services as efficiently as possible.
Technology

The application of science to solve a problem: the knowledge of techniques, processes, skills, methods—as simple as tools or as complex as computer systems.
Contracting businesses focus on being tradespeople and forget about being businesspeople.
We are all here to share ideas to make our business more successful and efficient.
How Do We Interact with Clients?

• Face-to-face
  • Technicians and sales staff
• On the phone
  • Client service representatives
  • On-call services
• With software
How Do We Interact with Clients?

• We invest in training, scripts, processes and procedures for live client interactions for our techs and office staff
• We should invest in our computer systems.
What Does Your Software Say About Your Business?

- We are organized
- We are efficient
- We are professional
- We are on the cutting edge
- Workforce development
- We invest in the future
What are Some Benefits of Integrated Software?

• Streamline processes & boost productivity
• Improve the client experience
What are Some Benefits of Integrated Software?

It can give you more accurate information faster so you can make better businesses decisions.
How Does Integrated Software Streamline Processes and Boost Productivity?
Streamline Processes and Boost Productivity - Service Calls

Database processes, recording:

• New client information into your database
• Work done and payment in the client database
• Equipment on site
• Referral source
• Alternate billing information
Streamline Processes and Boost Productivity

Dispatch functions relating to this service call

• Organizing the calls for the day for each tech
• Dispatching the service call to the technician
• Providing client information to the tech
• Accounting for the tech’s time
• Pricing the work
• Providing documentation to the client
• Recording future work
Streamline Processes and Boost Productivity

Other functions relating to this service call

- Booking revenue in residential service
- Account receivable & cash receipts
- Advertising leads & discounts
- Collections and aging
- Making the deposit
- Payroll
- Reporting
Streamline Processes and Boost Productivity

Inventory functions relating to this service call

• Material and parts - costing
  • Orders (PO’s)
  • Shop inventory
  • Truck stock
• Reordering stock
• AP and paying vendors
Streamline Processes and Boost Productivity

If it’s a job, there are may also be additional functions:
• Adding new system to client’s database record
• Subcontractor costs
• Spiff for sales
• Job costing
• Estimating
• Incremental billing
• Reporting & Sales Tracking
Streamline Processes and Boost Productivity

• Integrated software connects the different functions and reduces duplicated data entries.
• It improves accuracy, because each time you enter data, there is the chance of error.
Streamline Processes and Boost Productivity

Technician receives the s/c on iPad
• Time received is recorded
• Marks arrival time
• Records work done
• Enters materials or parts used from truck stock
Streamline Processes and Boost Productivity

- Chooses a flat rate code
- Gets client approval
- Generates an invoice
- Collects for work
- Marks departure time
- Sends call history back to office
Streamline Processes and Boost Productivity

When the call comes back to the office,
• The client database is updated
• The AP and AR are updated
• The costs and revenue are recorded
• Labor carried forward to payroll
• Materials costs posted to the correct department
Streamline Processes and Boost Productivity

- The inventory is changed
  - Truck stock is relieved of those materials used
  - Truck stock reorders are generated
- The dispatch schedule shows the call is complete so next call can be sent
How Does Integrated Software Streamline Processes and Boost Productivity?

• Entries are carried forward to other modules in the integrated system.
• Reporting capabilities.
• Can help even out seasonal slumps.
Information Carries Forward

- Customer Information
  - Service Call
    - Reports
    - Customer History
  - Invoice
    - AR
Information Carries Forward

- Service Call
- Dispatch Schedule
- Update Customer History
- Tech Mobile App
- Tech Time, Payroll
- Reports
Remain in Control

• While production and payment entries can carry all the way forward to the GL, permissions can also be set to control ability to change the GL (final posting).
• Staff members access is restricted to work with only the modules that relate to their duties.
• The system does not allow any entries to be deleted, but adjustments can be made.
• Audit log tracks who entered each transaction.
• Our system require staff members to log in for each user and has external access controls.
How Does Integrated Software Improve the Client Experience?
Improve the Client Experience

You don’t have to receive and enter data from paper tickets. The client site history is updated immediately, and the office has access to that information in real time.
Improve the Client Experience

The precise history of what parts and equipment were ordered or installed for your client, and easy access vendor invoices to process warranties or to reorder

☐ The client needs some kind of special-order filter

☑ Includes non-standard filter, tagged in w/h
Improve the Client Experience

Professional, uniform work orders and invoices for your clients.
Improve the Client Experience

Organizational benefits of an integrated software system give you more time to spend on making your business better.
More Accurate and Faster Information
Inventory Cost Tracking

This is Joel

This is Joel’s Truck

Monday
Commercial
RTU Repair

Tuesday
Residential
PM

Wednesday
through
Friday
Inventory Cost Tracking

This is Joel

This is Joel’s Truck

- A PO for the part was entered on this call
- Misc. Materials for truck stock were charged to call, relieved from inventory and a re-order generated.

Filters used from his truck stock were charged to the call

Equipment we here installed is carried from the PO to the site file.
This is Joel

This is Joel’s Truck

The actual costs of parts and materials used are reflected to the **Commercial Service Department** on GL.

Truck stock costs are reflected to the **Residential Maintenance Department**.

Equipment and material costs are reflected in the **Government Installation Department**.
Tracking Inventory Costs by Division and Department

- The equipment and parts purchased on a PO will be shown in customer history.
- The service call, maintenance contract and installation job show all both PO costs and truck-stock costs so they can be evaluated for profit/loss.
- Truck Stock reorders will be generated each day.
- The warehouse stock levels are greatly reduced.
- Better real-time accuracy and less allocating materials costs by estimating.
Tracking Inventory Costs by Division and Department

Even though we use ADP, the labor is all tracked on this system even though we don’t cut the checks.

For Joel, his time in and out of each call is applied to the call or job he is working on each day.

Those costs also carry forward as direct costs to those divisions and department.
More Accurate and Faster Information

- Reporting
- Job Costing
- Dashboard

Dashboard
Integrated Software: an Investment in Great Business Systems:

<table>
<thead>
<tr>
<th>System Cost</th>
<th>Amortization Period in Years</th>
<th>Cost/Mo</th>
<th>Cost/Day</th>
<th>Cost/Hr</th>
</tr>
</thead>
<tbody>
<tr>
<td>$20,000.00</td>
<td>10</td>
<td>$166.67</td>
<td>$5.48</td>
<td>$0.23</td>
</tr>
</tbody>
</table>
Set Long-Term Goals

Software systems gain value as data is entered
Integrated Software

Your business partners love when you have great business systems:

- Vendors
- Insurance
- Banker
- Bonding Company
- Coworkers
STOP Before You Shop

Don’t reinvent the wheel.
Why incur R&D costs when there are software packages on the shelf that have everything you need?
STOP Before You Shop

Identify Barriers

• Coworkers may resist change.
• Explain how software will benefit them.
STOP Before You Shop

If your business systems can’t keep up, the alternative is extinction.

“It is not the strongest of the species that survives, nor the most intelligent that survives. It is the one that is the most adaptable to change.”
#1 Reason For User Disappointment

Contractors fail to realize that they must put data in to get data out.
What’s Next?

Decide what features you need,
And what features you’d like.
Software Features

- A/R
- A/P
- Scheduling
- Dispatching
- Client history
- Database
- Job costing
- Estimating
- Payroll
Software Features

• Sales tax
• Flat rate and/or T&M pricing
• Inventory management
• Scanning & image storage
• Secure data storage & backup
• Control access to data
• Financial reporting
• Remote access
Software Features

• AIA billing
• Certified payroll
• Vendor history files
• Vehicle costs tracking
• Track and manage future work
• Even out seasonal slumps
• Preloaded prompts for call takers
Software Features

- Tracking marketing and advertising
- Accommodate future profit centers
- Reporting capabilities
- Levels of security
- Storage and backup (cloud?)
Software Features

Integrated Mobile Devices

• Give technicians instant access to relevant client files
• Reduce time spent calling dispatch
• Eliminate duplication of data entry
Software Features

• Can it grow with you?
• Consider your long-term plans
• Think of the changes in the history of your firm already
• Will you be ready for new opportunities or will you have to start over with new software again?
What about the Software Provider?

• Visit provider’s other clients and take a test drive.
• Search for online feedback.
• Consider provider’s access to sensitive business data.
• Run a D&B credit report.
Great Software Systems Have Great Support

• Can you count on them to be there in the long run?
• Will provider sell contract with other assets?
• Ask references about the support they get and how much downtime they have experienced.
Integrated Software Can:

- Streamline data entry
- Increase productivity
- Enhance company culture
- Work 24/7/365 for a few bucks a day
- Make your business look good and your customers happier
Integrated Software Can:

• Provide info needed to make business decisions in a timely fashion
• Simplify fiduciary responsibility and impress your partners in business
• Allow more time to work on your business!
Integration Evolution

Is fear of the unknown holding you back?

Kathy Townsend

Dave Kyle