BY KYLE BROWN

EASY INSTALLATION

» Use these **three tips** for a better software platform rollout.

IRRIGATION &
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**2021 JOB MANAGEMENT
SOFTWARE SURVEY**

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EASY INSTALLATION

Photo: K&D Landscaping

When it works correctly, using job management software can make tasks like customer relationship management and payroll seem effortless. But finding the right software to make that happen and integrating it into your daily routine takes a little bit more work. These tips from landscape and irrigation professionals can help that process go smoothly.

1 Take your time

At the beginning, the biggest obstacle for K&D Landscaping Inc., Watsonville, California, was choosing the right software option, says Shane White, maintenance department leader.

"It took us about two years," he says. "It came down to us not really being able to decide on one software compared to another."

Making the choice took time, with multiple demonstrations by each company and deep dives into the features available, he says. He talked to other business owners in the industry to get a read on what worked best for them and how they had incorporated those features. Part of the reason he was being so considerate was that he trying to make plans for the future.

"Where are you trying to go with your business? What software is going to be the best fit not only for today, but for the next year, or five years or 10 years down the road?" White says. "You have to be thinking about that."

Try not to just look for something that will work in the short term or up until a certain volume if you are focused on company growth. "We really wanted to make sure we made the right decision because we have a big goal," he says.

White worked with a team of two others with different backgrounds in the company to make sure the different segments of the company were represented in researching the software options. It was import-

ant for his team to know how the potential platform would match with what was needed from the accounting, executive and operations sides of the company.

Kansas City, Missouri-based Heartland Company, which was formed in 2016, built its model around growth through organic development and acquisition. As it brings companies into the fold, they're trained on Heartland's chosen software platform. Right from the start, they understand that onboarding with the new system will take some extra work with the later payoff of greater efficiency.

While it's possible to change a company's systems over in a handful of months, David Tribble, Heartland's Aspire director, says he aims for a longer window.

"Our method is that we want to make sure everybody's comfortable with it," he says. For a company that will stand alone as its own brand, "we will plan out for about four months."

2 **Choose your team**
Much of the effectiveness of transitioning to a new system depends on the team that's in place, Tribble says. "You can have two companies at the same revenue mark, and one company can handle something like this. For the other one, it flips their world on its head."

As an acquisition is underway, Tribble makes sure there's a mixture of people on the team tasked with setting up the new

software, including someone chosen to be the local subject matter expert. That person, typically an office manager or a similar position, is a part of every meeting related to the software. He also recommends including your strongest account manager, your operations manager and a representative from accounting.

"Really having everyone on the same page, understanding how things are going to look and making sure everyone is on board is important to us," Tribble says. "We really try to train up those key areas."

That way, when the training is finished several months later, several people throughout the company are able to answer
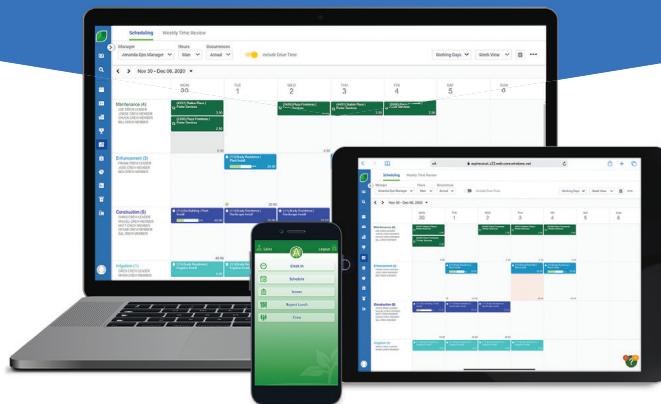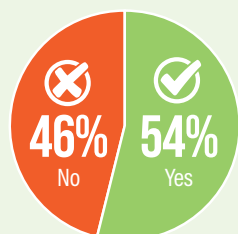
ON THE JOB

Job management software can be an extremely useful tool for landscape and irrigation professionals, especially as they're looking for efficiencies and ways to streamline the business. We asked our readers for feedback to uncover the major trends in how they use job management software and where it makes the biggest impact. Responses involving usage were filtered to select only those currently using job management software. Thanks to Aspire Software for sponsoring this survey.

Our survey tracked contractors across specialties, with more covering residential properties than commercial. About 40% had between 1 and 5 employees on average, with the next largest group running with 11 to 25 employees at 20%.

Contractors mainly use job management software for scheduling, estimating, customer relationship management and invoicing. If pressed to pick one of those as the most important feature, scheduling takes the lead at 47%, almost twice the 25% who chose estimation. Respondents consider ease of use, product features and ongoing customer support the top three factors when choosing job management software.
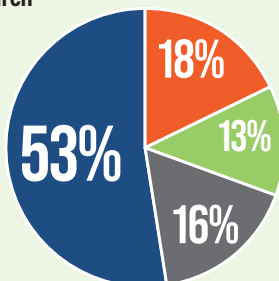
While implementing a new software platform can be difficult, contractors tend to believe that their crews are up to the challenge. A total of 69% characterize their teams as open to software. For training, a total of 44% cover the details either monthly or quarterly, just a little more than seasonally at 41%.
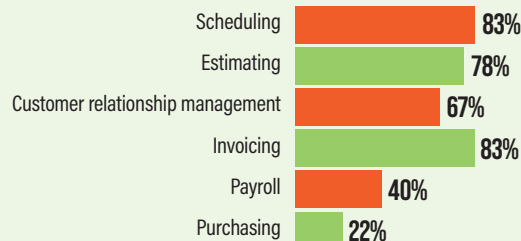
What services do you use job management services for?

- Scheduling: **83%**
- Estimating: **78%**
- Customer relationship management: **67%**
- Invoicing: **83%**
- Payroll: **40%**
- Purchasing: **22%**

Which one of those services is most important to handle with job management services?

- Scheduling: **47%**
- Estimating: **25%**
- Customer relationship management: **6%**
- Invoicing: **17%**
- Payroll: **5%**
- Purchasing: **0%**

Do you currently use job management software?

- **46%** No
- **54%** Yes

When did you last research a new job management software service?

- In the past three months — **18%**
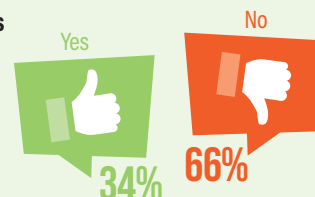- In the past six months — **13%**
- In the past year — **16%**
- In the past two years — **53%**
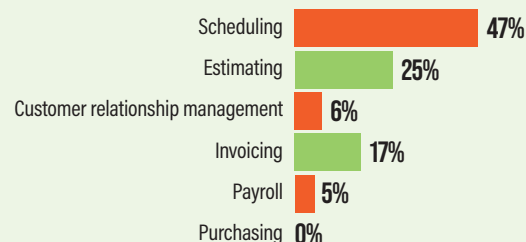
Does your business have an employee dedicated to technology and software management?
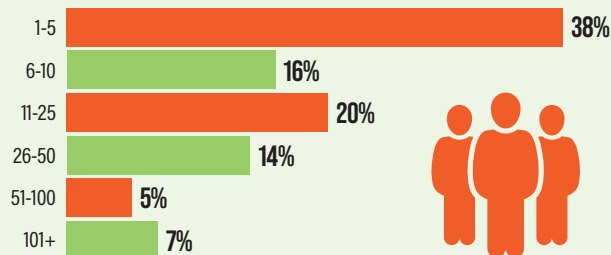
- Yes **34%**
- No **66%**

How would you describe your employees' approach to job management software?

- Very open to software — **25%**
- Somewhat open to software — **44%**
- Somewhat resistant to software — **22%**
- Very resistant to software — **9%**
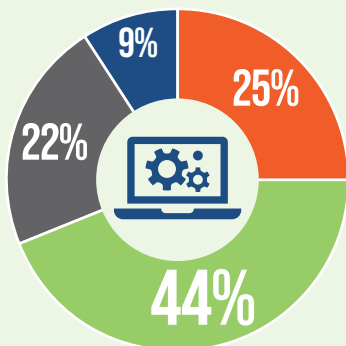
How many full-time employees does your company employ at peak season?

- 1-5: **38%**
- 6-10: **16%**
- 11-25: **20%**
- 26-50: **14%**
- 51-100: **5%**
- 101+: **7%**

How often do you do training for job management software?

- Daily — **7%**
- Weekly — **8%**
- Monthly — **21%**
- Quarterly — **23%**
- Seasonally — **41%**
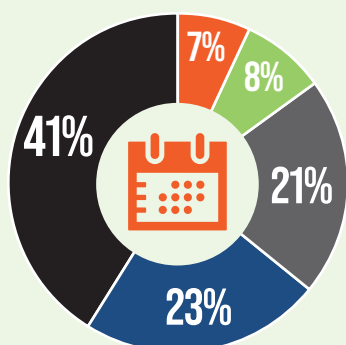
What is your business's total annual budget for job management software services on average?

- $2,500 or less: **22%**
- $2,501-$5,000: **22%**
- $5,001-$10,000: **15%**
- $10,001-$25,000: **13%**
- $25,001-$50,000: **11%**
- $50,001 or more: **17%**
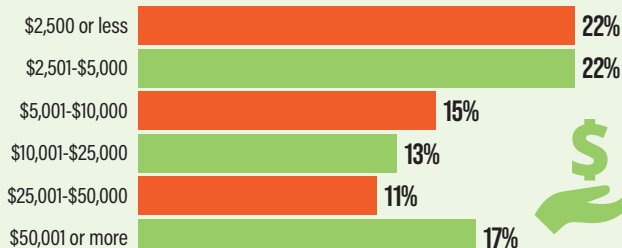
questions and serve as a resource for others still getting used to the platform, he says.

"Our industry is so slow to change and adapt, and it really upsets people if something gets changed," he says. "This can be an opportunity for somebody to step up. I don't know who from the staff is going to embrace it. But somebody will. Don't be afraid to lean on them through the process."

While one person can help drive the integration of a new software, there needs to be assurance from company management, White says.

"A big part of it is having buy-in from the top down," he says. "Having the leaders of the company and the executive team, the management team, the supervisor level – getting their buy-in is critical to making a successful rollout of the software."

The management team has to think like salespeople, motivating the crews to build the software into their daily routines for everyone's benefit, he says. With the right drive from the top of the company, the perspective can shift from being a frustrating struggle with data entry and check-ins to a way of improving communication and reducing daily annoyances.

"You have to sell, 'Hey, once we get the system to where we want it to be, we're going to be making leaps and bounds of improvements,'" White says. "If you can get them to buy into that belief, they will take it and run with it."

Supervisors and crew managers are especially important in the buy-in structure, as crew members tend to be the toughest to bring on board, he says. It's important to be honest that the shift might feel tough at first, but share how the software will sustain the company's growth and improve things for everyone.

"That's been a big part of our success, really selling it to our team in a positive way without sugarcoating it and letting them know that we're going to be here to work through it together," he says.

The other side of that equation is to be open to feedback and work alongside your crews to overcome any obstacles, he says. If necessary, take the problem back to the software provider and look for solutions together.

③ Gather the information

Tribble's team uses a checklist to help move the transition along, starting with some discovery time to dig into the company's business practices. Having a solid understanding of how the company operates can make it easier to match up software features to the job requirements. That includes customer relationship management and job management structures, whether those are handled in another software platform or on scraps of paper collected in the truck console.

"One of the biggest lifts is getting together all of your information, wherever it is," Tribble says. "Sometimes it's in spreadsheets. Sometimes it's worse."

Be ready to dedicate a few weeks just to that collection process and getting the data where it needs to go in the new system, Tribble says. It might be time-consuming, but the payoff will be worth it going forward.

While working through that process, it can be helpful for the team to understand where the data will end up being used.

"Start with the end in mind," says Tribble. "We'll show them an invoice and show them how things flow through the system. On the first couple calls, we'll say 'Here's how things move. You put your contact information here, and now it gets associated with a property. Then a property can create a contract or work order.'"

When the process feels more tangible, the team is more likely to really put effort into getting the right data to the right place, he says.

"You're showing them the end result up front and making sure they understand," he says. "That puts an emphasis on slowing down and getting the right information. It's junk in, junk out. If we don't spend some time there up front, it's going to cause a lot of headaches on the back."

K&D used the training opportunity as a way to develop standard operating procedures for the software use and had videos made with practices specific to the company. While the software platform the company was using had its own video library, having customized options helped crews understand the changes more quickly, White says. Not only has that helped his team develop specific SOPs, but they've already improved some of those guidelines in the process of collecting and documenting them.

It's important to understand how much time to put into the software to get the most out of the features. It can be easy to get lost in the weeds, entering every single bit of information possible. But when Tribble's team works with a new company, they have to help some crew members find a balance.

"We try to really find the balance of knowing what information you need to accurately run your business to get good real-time information without spending too much time in front of the screen," he says. "If you're an account manager, your number one role is to be in front of the customer, not in front of the system."

Don't allow employees to think of the software as a means of staying chained to the desk, he says. Look for ways for those details to be entered from the field or shared through a cloud system.

"Invest in the technology to allow your teams to be mobile and take advantage of the software in the field," says Tribble. 🍃

WHEN DECIDING ON THE CORRECT SOFTWARE, LOOK FOR A PLATFORM THAT WILL **MATCH YOUR GOALS FOR THE NEXT FIVE YEARS OR MORE**.

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