



BREAK THROUGH THE BROKE WITH FIELD SERVICE SOFTWARE

**A Guide to Boost Profits and Run A More Efficient
Service Business**

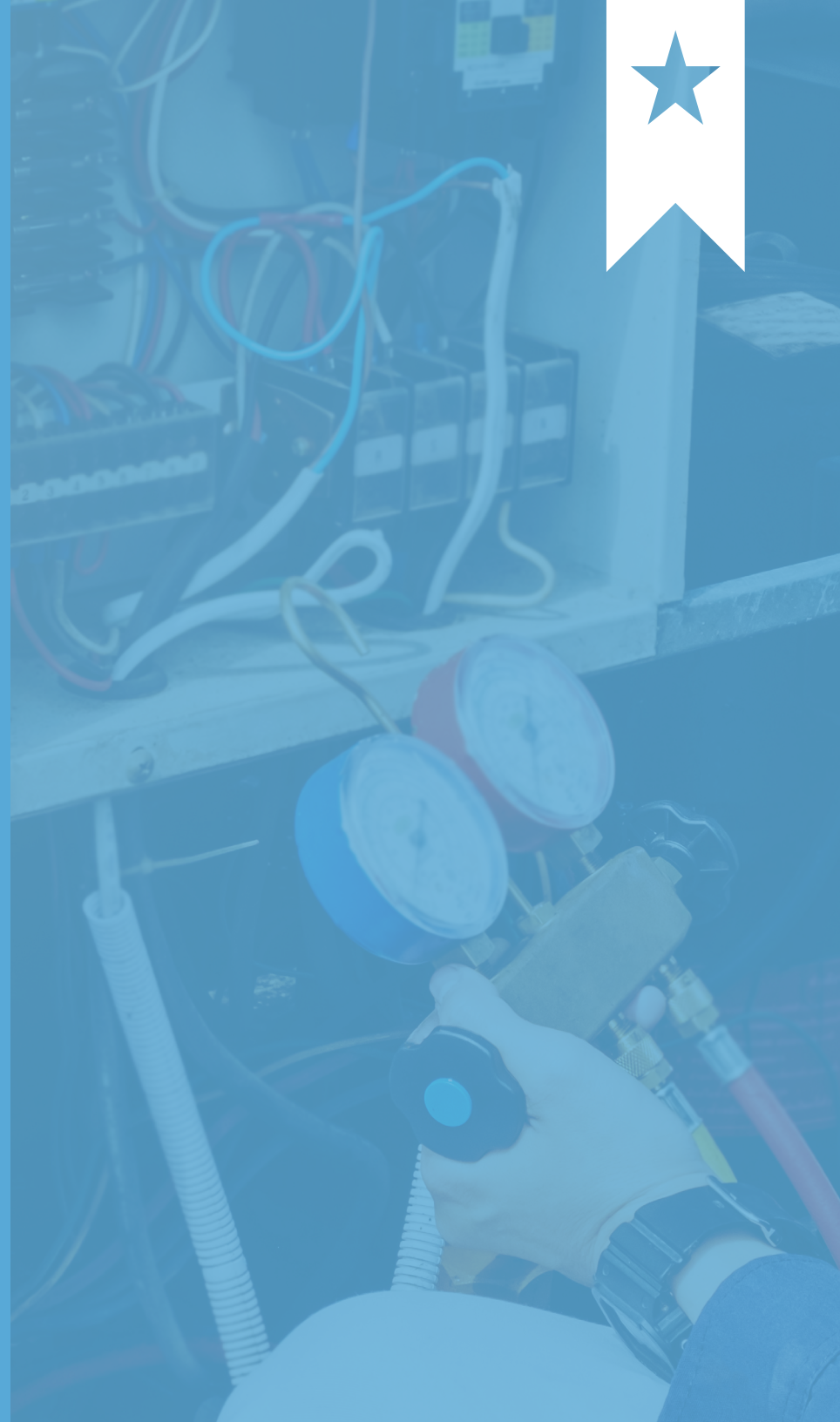
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INTRODUCTION



Calling all HVAC, electrical and plumbing contractors!

You work your tail off and should be taking home more money. So why is it that after all your business expenses are paid, there's not much left for the important things like expanding the business, paying employees more money and offering better benefits?

Running lean and mean and going broke are two different things. If you're looking for profitability, efficiency and consistency, the answer to your dilemma is field service software. And thanks to a recent merger between FieldEdge and Coolfront, we have a software solution for the entire life of your service business.

Two of the most experienced service software businesses recently joined forces to offer you a complete field service management solution. Together we have been doing this for a long time: over 40 years. Whether you are a small business with 2 or 3 trucks, or have expanded and grown to 20+ trucks, we have your back with several options that will help grow your business and put more profit in your pocket. Both solutions use flat rate pricing to get the job done efficiently and consistently. And when the work is done, the business makes more money and can invest in itself.

Both software options utilize the best flat rate parts and repair database in the industry—we're talking over 35,000 repairs and 16,000 parts.

The logo for coolfront, with 'cool' in blue and 'front' in black, set against a light blue background.

Coolfront Mobile is the leading zero-cost, flat rate pricing app for contractors in the HVAC, plumbing and electrical industries. Customers receive unlimited training and support along with access to Coolfront's many add-ons including Google Calendar, QuickBooks, and payment collection.

The logo for FieldEdge, with 'Field' in black and 'Edge' in green, set against a green background.

FieldEdge is the answer for medium to large sized contractors. It's a subscription-based solution that provides full dispatching capabilities, a true QuickBooks integration and a visual pricebook that allows technicians to offer profitable flat rate pricing to their customers.

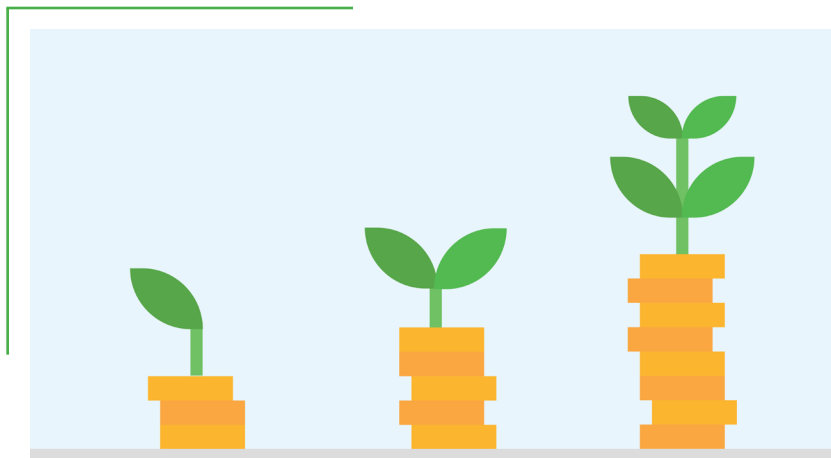
| | COOLFRONT | FIELDEDGE |
|---|-----------------------------|--------------|
| Digital Work Order Management | ✓ | ✓ |
| Scheduling / Dispatching | With Google Calendar Add-On | ✓ |
| Payment Processing in Field | ✓ | ✓ |
| Robust Flat Rate Parts & Repairs Database | ✓ | ✓ |
| Customer Approval by Email or On the Spot | ✓ | ✓ |
| Marketing ROI tracking | | ✓ |
| GPS | | ✓ |
| Monthly Subscription and Pay Per Work Order | Pay Per Work Order | Subscription |
| QuickBooks Integration | ✓ | ✓ |
| Desktop / Mobile Access | ✓ | ✓ |
| Customer Management | | ✓ |

PROFITABILITY

MORE PROFIT THROUGH FLAT RATE

A survey found that 91% of homeowners prefer a flat rate price upfront rather than playing around with time and materials. Customers only have two questions when they have a breakdown: “What’s wrong?” and “How much?” The old school approach of time and materials pricing has all kinds of factors affecting the final price. How good is the tech and how long will it take them? Will they run into any snags? Why are the parts quoted cheaper on the Internet? Flat rate pricing is easier, more efficient and much more profitable. Customers want a price and they want it fixed. Flat rate accomplishes this.

It’s not something anyone thinks about but we use flat rate pricing to buy pretty much everything. When you buy a burger, you know the price upfront. There’s no cost breakdown for the lettuce, the cheese, the time it takes to cook the burger on the grill or the employee’s pay. It’s all baked into the final price. Almost everything you buy utilizes the flat rate pricing structure.



*“A survey found that 91% of homeowners prefer a flat rate price upfront.” **

* Source: Decision Analysts

PROFITABILITY

WHY FLAT RATE?

THE BEST OPTION FOR CUSTOMERS, STAFF, TECHS AND OWNERS

Flat rate isn't only a better option for the business. It's a home-run for the customer, the office staff, the techs and the business owner. Here's how it helps each of them:



Customer much more comfortable with upfront price

Pricing is consistent - you're paying the same as everyone else for a specific repair

customer

office staff

More organized and consistent pricing

Don't have to hound customers to pay if they pay in the field



Time allowed for repair is generous; techs don't have to rush

Don't have to worry about complaints and giving discounts

Customer won't be shadowing them looking at the clock

Takes away a lot of the pressure so they can just do their job

technician

owner

Greater profits

Company can afford higher pay and benefits and therefore close the employee revolving door



PROFITABILITY

SETTING SERVICE RATES

Do you struggle with what to charge the customer? You're not alone. There's a simple way to figure out how much to charge, even when you're using flat rate and the customer doesn't actually know your "hourly rate." That hourly rate has to include everything from unapplied time to the gas you pump into the trucks. For a more in-depth look, check out [The Essential Guide to Setting Service Rates](#).

To set a service rate, you have to figure out your costs. The two types of cost you have to determine are direct costs and indirect costs. Then you have to add in your profit.

Direct Costs are costs that you can directly attribute to the service you are providing. These include:

- Parts or materials for a specific job
- Labor expenses

Indirect Costs are costs that can't be billed to the customer directly. These may include:

- Unapplied time
- Office staff's time
- Rent
- Utilities
- Phones and data plans
- Vehicle maintenance

We usually find that contractors are charging too little and that they need to raise their rates.

We even have data from what your competitors are charging in your local area. [Check out our 2018 Billing Rates Guide](#). The great thing about Coolfront and FieldEdge is that you are in control—you can alter your service rates anytime.

EFFICIENCY



IMPLEMENTATION ROADMAP

THE KEY TO EFFICIENCY

Are there things that could be done faster and more efficiently in your office and in the field? Of course. We talk with potential customers all the time that are still using the old-school paper ticket method. On the other hand, we have customers that provide all their techs with iPads to do everything electronically and are paid before they leave the job site with a credit card. Software can help with many of these challenges. Service software can automate a lot of the tedious tasks so your employees can deal with what they're best at—fixing customer's problems. Whether your roadblock is accounting, dispatching, or pricing, there are many options within our software to help. But where to start? Let's consider what to look for in a service software.

CHOOSING THE BEST SERVICE SOFTWARE

Technology is how we improve productivity. If there's a better way to do something at work, whether it saves time, money or resources, then software is usually the place to start. But there are many kinds of software, each with its own intricacies, price point and ease of use. Let's walk through a typical roadmap for choosing and implementing service software.

*"After implementation of FieldEdge, contractors report saving 50% of their time on dispatching & scheduling."**

* Source: FieldEdge Customer Research

ONBOARDING/SUPPORT & TRAINING

Implementing the software is a huge factor to consider when purchasing. So check out the training before you purchase. Is someone going to "train the trainer" remotely? Will there be in-house training? What about the cost—is it included or additional?

1

THE SIGNUP

Ok, you've identified the need and you have done your research. Which one to go with? Look at reviews and look at the price. Many software companies charge you for onboarding and even continued training.

2

THE TRAINING

Once you have committed to and paid for the software, it's time to figure out how to use it. It sounds easy, but it may entail days of training, time lost from your regular job and different learning curves.

3

THE LAUNCH

Obviously the first few days of using new software is the hardest. Change is hard and some employees "roll with the punches" better than others. This is when it's important to have access to resources that can answer questions on the software until your business masters it.

4

ONGOING SUPPORT

The software is up and running and employees have the hang of it. Now what? Most software is always evolving as the company will release new versions, enhancements and new functionality. Is there someone that is available to support your team on changes and upgrades?

5

FUNCTIONALITY

Is the software cloud-based? Does it have an app that your techs can use in the field? Does it sync up with the office? These are all valid questions you should be asking.

6

CONSISTENCY



Consistency helps workflow in the office. The same can be said for your product or service. In the service industry, the goal is to provide the same high quality service to all of your customers. If everyone is using the same app and the same process, things go much smoother. The office staff is happier, the techs are happier, the owner is profitable and the customers are happy. Here are just a few things that software can help with in regards to consistency.

TIPS

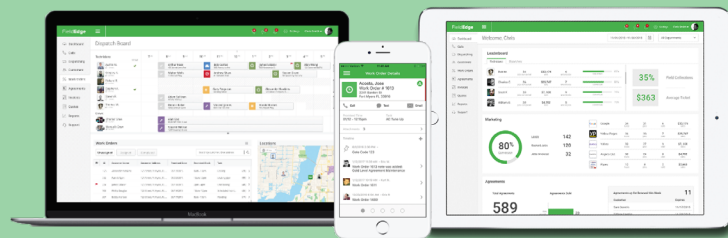
- *Flat rate pricing keeps things consistent from job to job and technician to technician*
- *Each customer gets the same price*
- *Consistent branding and a more professional look and presentation*
- *If your business is consistently producing a quality product or service, it's easier to scale and expand the business. We see the importance of consistency every day in the growth of franchises*
- *If a business is consistent in their business practices, it allows them to set benchmarks/goals and makes it easier to expand*
- *Our software ensures a consistent price and experience for your customers*

FieldEdge



coolfront

Ready to streamline business operations and turbocharge your techs with a robust field service software?



BOOK A DEMO

Ready to go mobile and boost profits with a simple, zero-cost flat rate pricing app?



GET A FREE TRIAL