

4 Key Steps for Buying Pest Control Software

Step 1: Define Your Business Goals

Step 2: Review Your Current Software & Processes

Step 3: Evaluate and Compare Your Options

Step 4: Make the Right Decision



Steps to Choosing the Right Software

Whether you're looking to improve efficiency, grow your business, or free up some time - your end goal should be finding a pest control software solution that drives smarter business decisions. In order to find the right solution, you'll have to review your current software and processes, define your goals, and evaluate and compare your options.

How can the right pest control software help you make smarter business decisions?

Choosing the right pest control software is crucial to reach your end goal. This guide will help you determine whether your existing software solution (if you have one) offers everything you need to make smarter business decisions. Here are some key features to look for:



Field Operations Capabilities



Office Management Tools



Sales Management Solutions



Marketing Solutions



Reporting Functionalities

Step 1: Define Your Business Goal

Once you've completed the below exercises, you should've narrowed down your software options to your top-2 (or maybe even your top pick)! Once the decision has been made and you have the right software solution in place, you'll see an increase in customer satisfaction and efficiency - allowing you to make smarter business decisions, freeing up time so you can focus on what matters most.

Promote Growth

Increase profits

Keep up with
the competition

Maintain control

Focus on
customer service

Gain and keep
customer trust

Be proactive

Improve
accountability &
productivity

Make data-driven
decisions

Reduce expenses

Support & improve
current workflows

Manage your day
in real-time

1. What are you looking to achieve?

2. What are your top 3 requirements?

a.

b.

c.

3. Are there other solutions you're currently using to fill some of the feature gaps?

If "yes", either make sure they can be tied into your new software solution through APIs or the software solution you go with has built-in features that can accomplish this (even better!)

4. Do you have a dedicated resource to implement a new software solution?

5. Is your staff willing to invest the time into learning a new software?

6. What's your budget?

Step 2: Review Your Current Software & Processes

**Use the checklist below to indicate the features available
in your existing pest control software.**

Each check mark equals 1 point

Field Operations:

Mobile Application

View job list for the day, record material usage, collect payment & customer signature

GPS Tracking

View where your technicians are from a dashboard

Driver Behavior

Helps reduce bad driving behaviors with alerts and driver performance reporting

Route Optimization

Schedule the most efficient routes for technicians, while still honoring customer requests and constraints

Material Tracking

Ability to preload chemicals for easy tracking and reporting

Termite Forms (WDI/WDO)

Ability to access and fill out preloaded WDI/WDO forms from the office and mobile app

Barcode Scanning

Ability to scan bait stations and Sentricon devices

Service Notifications

Ability to notify customers when you're on your way

Service Reports

Request customer feedback regarding their technician and service

_____ **Field Operations Total**

Office Management:

Schedule Work Orders

Including one-time and recurring visits (where you can set the frequency, duration and cost of service ahead of time)

CRM (customer relationship management)

Ability to manage customers, their services, payment history and more

Billing/Invoicing

Payment Plans/Autobill

Quickbooks Integration

Credit Card Processing

Proposals & eSignatures

Ability to send out proposals via email & collect the customer's signature

Call Center Tool

Ability to automate service notifications, reminders and collection calls

Customer Notifications (text alerts, emails, etc.)

Ability to send notifications to customers via text or email

Customer Portal (for your customers to pay their bill online)

Gives your customers the ability to pay their bill online and view important documents

Cloud Based Solution

Ability to access your information from anywhere - the office, your home, on-the-road

_____ **Office Management Total**

Marketing & Customer Experience:

Lead Management/CRM (customer relationship management)

Manage your customers and leads in one place & track campaign success

Marketing Automation

Ability to create email, drip and nurture campaigns that run themselves

Reviews

Automatically request customer reviews to be posted to your website, social media & other review sites

Service Reports

Automatically request customer feedback about appointment satisfaction and quality of service

Surveys

Create a survey on any topic to gain better insight and improve customer satisfaction

_____ **Marketing Total**

Reporting:

Custom Reporting Options

Ability to select and compare the information you want more insight into

Dashboard View

Ability to view your most frequently accessed reports (charts, graphs, etc) in one place

_____ **Reporting Total**



Total Points

Key to Evaluating Your Existing Pest Control Software

Points	
0-5	It's time to start exploring your software options!
6-10	Your current software has limited capabilities. There's no better time than now to start exploring what's out there!
11-15	Your current software has some of the key features needed to maintain your business. If you're looking to improve efficiency, grow your business or free up some time, there's a better solution out there for you.
16-26	Your current software has most of the key features and functionality needed to maintain your business and meet customer expectations. But is that enough? Take a look at the features missing in the checklist above. Finding a solution that fills those gaps will help you succeed.
27	Looks like your existing software offers everything you need to reach your end goal, while exceeding customer expectations. Great job!

Review Your Current Processes

Now that you've evaluated your existing pest control software, take the time to meet with at least one representative from each area of your business, including a few technicians. Ask each representative to meet with their team beforehand to help identify gaps, inefficiencies and pain points. This will help you stay organized and make better use of your time when it comes to evaluating your current processes.

Pest Control Businesses by Size - Thinking Long Term

Micro, Small & Medium Businesses

As you grow, make sure you choose a pest control software that grows with you. Making the switch to a new software solution every few years is a lot of work and unnecessary if you choose the right pest control software from the start.

Large & Enterprise Businesses

Having the ability to tie everything back to one software solution is key in seeing what works, what doesn't, where your business is excelling and where it can use help. Choosing a software that allows you to do all of this in one place will help ensure you're on-track to future success.

Let's Get Down to It...

Pass along the following questions to the key representatives from each department to discuss with their team and gather feedback on:

1. What's working in your current role?
2. What's not working in your current role?
3. Are you spending time each day/week/month completing tasks that take longer than you feel necessary?

a. If "yes", fill out the chart below:

What is the task? <i>ie. Route planning</i>	How often are you completing this task? <i>Daily, weekly, monthly</i>	How long does it take to complete the task? <i>Minutes, hours, days</i>

4. Do you have to enter the same information in more than one place?

a. If “yes”, fill out the chart below:

What kind of information has to be entered in more than one place? <i>ie. Work orders</i>	List all places this information has to be entered

5. What are your top 3 biggest pain points when it comes to doing your job?

- a.
- b.
- c.

Step 3: Evaluate and Compare Your Options

Now that you’ve taken a good look at your existing pest control software and have a handle on the gaps, inefficiencies and pain points for each area of your business - it’s time to discuss how you can make smarter decisions with the right pest control software.

Before you request a demo, do some preliminary research. Evaluate their features and functionality by visiting their website, social pages and YouTube channel. Make note of their features using the checklist below and be sure to write down any uncertainties or questions you have for the sales demo. If you’re unsure about the functionality of these features and benefits, reference Step 2 (where you evaluated your existing software).

Features & Benefits	Company Name	Company Name	Company Name
Is the solution cloud-based or on-premise?			
CRM (customer relationship management)			

Mobile application for technicians			
GPS vehicle tracking			
Driver behavior management and reporting			
Route optimization			
Material tracking			
Termite forms (WDI/WDO)			
Barcode scanning (IPM)			
Service notifications			
Service reports			
Schedule work orders			
Billing/invoicing			
Payment plans/auto-bill			
Quickbooks integration			
Credit card processing			
Proposals and eSignatures			
Call center tool			
Customer notifications (text alerts, emails, etc.)			

Customer portal			
Lead management			
Marketing automation			
Reviews			
Service reports			
Surveys			

Reporting Features	Company Name	Company Name	Company Name
Custom reporting options			
Dashboard view			

Support and Pricing	Company Name	Company Name	Company Name
Support - included in pricing?			
Support - hours?			
Support - is it outsourced?			
Migration/data conversion cost			
How long does it take to get started?			
Onboarding - what does this consist of?			

Training - what resources do you offer?			
Pricing & Packages			

Company	Company Name	Company Name	Company Name
Can you provide a customer reference?			
How long have you been in business?			
How many employees do you have?			
What separates you from the competition?			
Where is my information hosted? Is it secure?			

Step 4: Make the Right Decision

After you've completed your demos, weigh the pros and cons with your team.

Remember: The right pest control solution can essentially run every aspect of your business, in one place.

Company Name	Pros	Cons