Expert Advice on Choosing Software

By:
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Expert Advice from:
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Here are five key considerations when adopting a new software.

1 - Review your company

The first step in the process of finding the best software for your company is to take an honest look at both problem areas and what you are trying to do with your business. Finding a software solution that works is much easier after you are able to clearly name problem areas in your business.

It can be easy to get caught up in the day-to-day and miss identifying solutions or opportunities that can help your business do things better, quicker and more efficiently. Luckily, Estimating Edge is there to guide you through the process of examining where you are at and finding the solutions that make sense for your business.

"Our job is to take what they're working with and try to be in their world and understand what they're facing, the problems or the good things," said Lombardo. "You've got to have your ears open and listen and try to understand what their position is."

These initial conversations with your software provider are crucial to finding where dysfunctions lie in your business. Once identified, your software provider can take a consultative approach to review solutions available and can connect your business with the people who can guide you through implementing a new software.

"I believe once contractors have that aha moment, there's no turning back," said Lombardo. "They realize their problems are sitting somewhere on a shelf and just brewing. I truly believe that through a consultative sales solution, particularly in software, once you get your customers through several of those collectives aha moments, that's when they say, 'Wow, I really need to do this thing because I can see how this is really going to benefit me.'"

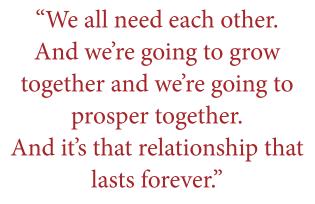## 2 - Decide if you are a good fit

Hart stresses that these initial conversations are profoundly helpful in discovering if the software provider you are considering is the right fit for the company's needs at the current moment. "It's all about fit and need. It's as simple as that," says Hart.

In talking to potential customers Hart says she always tries to identify the contractor's needs and the timing of that need. Need is a moving target and it could be today, or it could be three years from now.

Lombardo agrees on the importance of these initial conversations for determining fit. "They're interviewing us as well," said Lombardo. "We don't want to be the wrong fit for them." Hart cautions against choosing software providers that just want to close the sale and don't see implementing technology solutions as a relationship and a journey. Making a change in your business processes is a big deal in a business. It's important to know that you have a partner who will help with the transition. You want to be sure they have the commitment to help your business succeed and the resources available to position your team for success. You want a software provider that truly understands your needs and how your business is going to adapt to the implementation of the software. "It's a team effort," adds Lombardo. "We all need each other. And we're going to grow together and we're going to prosper together. And it's that relationship that lasts forever."

3 - Choose your champion

Bringing in new software is a full-time job. Proper implementation of a new software won't happen overnight; it will take time and intention, so you will need to choose someone to be an advocate, who will make it their job to work with the software provider to achieve success. Start by identifying one or two key employees who are onboard with the idea and can become the champions for the software within your company.

The champion will be someone who owns the relationship with the software provider. They

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manage the relationship and help bring the rest of the team on board with the changes in processes that come with implementing software. Talk to your team to see who is interested in finding a better solution and an improved process. Have them be part of the selection process. When you find someone with that passion for improving, their passion most times spreads to the rest of the team, making changes less uncomfortable.

Hart says the champion should be "someone who's going to own the transition from what they're doing today to where they want to be."

4 - Company culture and training

Adopting a new software is in some ways is like adopting a new company culture. The key in successfully adopting technology into company culture lies in training. When you give the people in the company from the rooftop to the back office to the front office the right training, then culturally the software seeps into the culture of that company.

"You [have] got to take ownership of the software. You have to get training. You have to be taught on how to use it correctly. And once you get past that, it's just a matter of making a phone call to get support," says Lombardo.

Support and training during the implementation of The EDGE is key to success. It follows a set process. The contractor is learning the product and they also need to move certain data around, and to do it effectively it has to be done in a one-on-one environment.

It's one thing to provide users with software that helps them compete for the job. It's another thing to make sure they are able to use it. The Estimating Edge provides on-site, in-house and virtual training with a dedicated support specialist ready to discuss anything no matter the complexity of the topic. Estimating Edge's goal is to get your team up and running quickly with the customized training options that work for you, meeting your needs and at the pricing that fits your company's budget.

5 - Account for timing and taking it slow

Timing is everything. Knowing when it is the right time and the right product should be top of your mind before implementing a new software. Make sure your company is in the right place, with all the elements needed for a successful transition in line.

"All companies go through a cycle. If you think of a product life cycle, companies go through a company life cycle. So, they're either going up or they're going down the curve. So where do they fit with what they're trying to do in this curve?" says Lombardo.

He relates it to furnishing a house. "You don't buy everything at once. You kind of start feeling internally 'what's next?' Do I start with the living room? Do I start with the kitchen? And things just start to develop. That's kind the way I think our software is purchased."

"It's really from cradle to grave now in terms of everything the EDGE can help our contractors with. We don't sell it all right out of the box because it is crawl, walk, run, and that's understanding our customers. Understanding the pace with which they can move through, a change in all their processes," adds Hart.

Hart says it's important for the software provider to really listen to the contractors in order to find the best solution rather than just tell them about everything their software can do. "Our job is to listen to what they're telling us and to sum it all up and find a solution for what they're telling us their needs are."

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Jackie Hart

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Bring your estimators and company together to work through these 5 Key Considerations with the experts at Estimating Edge. The best way is to reach out and visit with Jackie Hart and John Lombardo or any of the highly experienced roofing sales representatives for the EDGE. Set up your free consultation to review these 5 Key Considerations today at marketing@estimatingedge.com.

About the experts

Jackie Hart is the Midwest regional sales representative for Estimating EDGE. She's been working in consultative sales for the company for just over four years and has been selling software in the construction industry for 23 years.

John Lombardo has been with the EDGE since 1990, starting as an EDGE representative for the Southeast United States and is now the director of sales. He stayed with EDGE because he loves finding solutions to problems and working with contractors to connect them with software that fits their needs and supports their businesses.

Title: Roofing Road Trips: The 5 Key Considerations to Choosing a Sales Software

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