BUSINESS MANAGEMENT SOFTWARE GUIDE:

How to Automate and Digitize Your Lawn and Landscaping Business to Save Time and Increase Profits

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INTRODUCTION

22 DAYS OF WORK SAVED PER YEAR

As a lawn and landscaping contractor and business owner, you're busy. The last thing you want to do — or have time for — is to search through the endless maze of green industry apps claiming to help you run your business more effectively. You may have noticed a few of your competitors offering customers online scheduling and invoicing and you may have wondered if you should do the same. Perhaps you then talk yourself out of it, convincing yourself that spreadsheets and a free scheduling app are all you need to run your company.

Sound familiar? You're not alone. It's tough to know when to make that leap from pen and paper and spreadsheets to more sophisticated software, or from free apps to more advanced, paid apps that can compile your company's data for scheduling, invoicing, routing and more. When you find yourself in the weeds, trying to manage your workers, job orders and customers and your spreadsheets are becoming a pain, it might be time for an upgrade.

Smartphone apps have come a long way since the first one, a game called Snake, was created in 1997. These days, all apps, including business management apps, are significantly more advanced than their predecessors. Business management apps are now faster, more agile, can better protect your data and can more easily integrate with other programs you're using, like accounting software. If you've been putting off a transition to advanced business management software and apps, now may be the time to consider it. Today's apps are proven to save businesses time — according to a Harris Interactive for Clickware study,

using apps on your smartphone could help you save 22 days of work per year. For example, apps allow users to store their preferences and data, which can save business owners countless hours. More importantly, they've shown to save businesses money. Research from Salesforce shows business management software can help increase sales by 29%.

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EVOLUTION OF BUSINESS MANAGEMENT APPS

The adoption and use of business management software in all its forms — from free apps to enterprise resource planning (ERP) systems used by larger corporations — has increased dramatically in recent years. Another popular type of business program is Customer Relationship Management (CRM) software, which includes sales, marketing, customer support and feedback features. A Gartner report from 2018 says CRM use overtook database management systems, such as Microsoft Access, back in 2017. CRM apps allow businesses to access customer data in real-time, through mobile and cloud-based connectivity.

What does that mean, really? For one, business management CRM apps take all that essential information about your business that you've got stored in various spreadsheet files and puts it into an easily accessible format on desktops, laptops, tablets and mobile phones. CRM systems help organize and store loads of data, from customer and vendor information to billing and invoicing needs. CRM systems can handle employee scheduling and payroll, scheduling jobs and finding the best transportation routes to customers.

One of the best parts about business management software CRM apps is that they are easy, practical and come ready to use. For those reasons and more, they are gaining quickly in popularity. According to a market report by Grand View Research, 91% of companies with more than 10 employees use CRM software. That market use is expected to increase annually by 10% throughout this decade.

Every size of company can benefit from using business management apps and that is especially true of the lawn and landscaping industry. Business management CRM apps
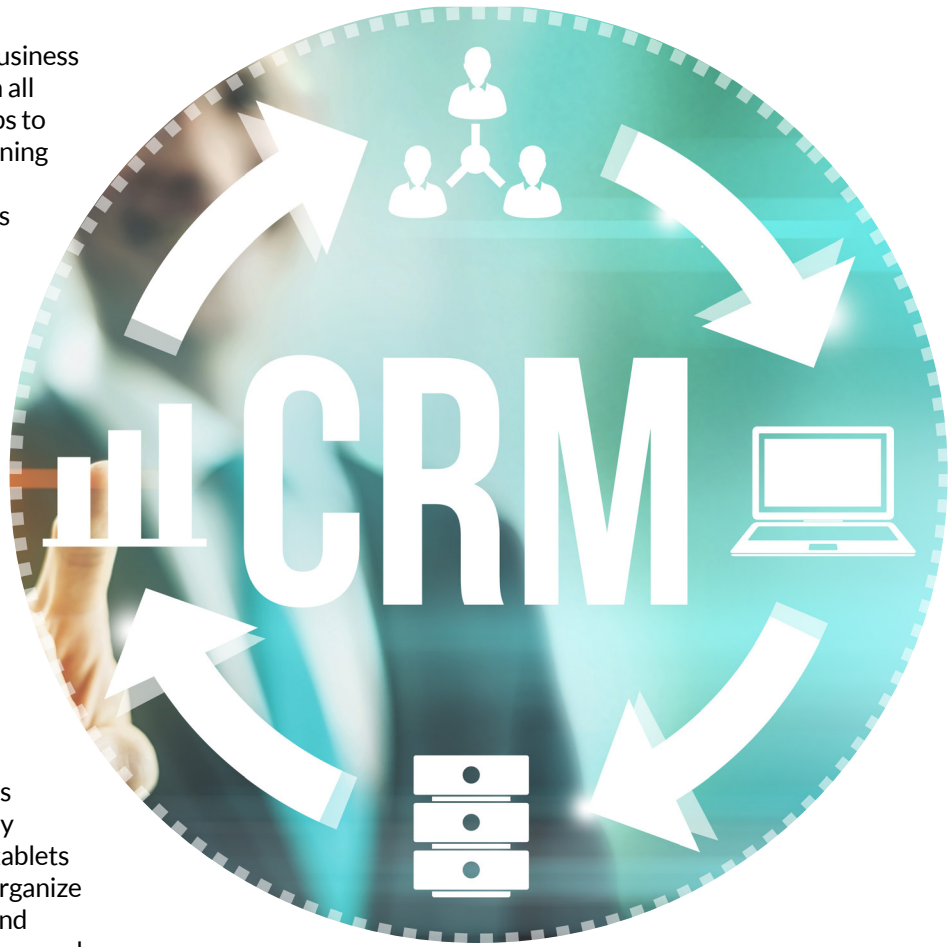
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can help schedule employees, log their hours and then apply those hours to payroll and tax functions. Most of the apps designed for this industry offer job cost estimating and work order management. Some apps can help with fleet management, while others have marketing capabilities. Most of these apps can integrate with other systems and apps, like QuickBooks, through the use of APIs.

Let's take a look at some of the features available in many of today's lawn and landscaping business management apps.

91% OF COMPANIES WITH MORE THAN 10 EMPLOYEES USE CRM SOFTWARE

ALL-IN-ONE CRM APPS

There are several apps on the market that provide many services on one platform, specifically targeted to the lawn and landscape industry. These apps store customer information for job order and marketing purposes and employee data for scheduling, payroll and taxes. They can also record payments, recurring jobs, customer messages and more. With data in one place for multiple uses, double entry is eliminated, saving time.

One example of an all-in-one app designed for the green industry is **Arborgold.** The app helps contractors manage leads and customers, bid jobs, schedule work, track inventory, run its supply chain, manage projects and invoice customers from a computer or mobile device. Contractors can automate tasks, improve scheduling, connect the office and field in real-time and more.

Arborgold has an auto-price calculator for easy estimating, lawn measurement functionality, a digital landscape design tool, as well as detailed job costing and resource management features. It also has business intelligence dashboards, a supply chain management module to watch over inventory, vendors and projects, as well as routing and time tracking for payroll preparation.

To get the most out of your business management software, Arborgold advises contractors to build and maintain detailed cost and price lists for labor, materials and equipment to improve estimating, job costing and profit margins. The company also suggests implementing simple sales, marketing and client automation workflows so it's easier and effortless to follow up on customer leads, communicate job status and remarket or resell services. On the human resources side of the business, direct and indirect time tracking and GPS crew location features can help streamline payroll preparation. Meanwhile, third-party

integrations allow users to connect their tools with Arborgold including Google Calendar, Twilio SMS, SendGrid email marketing, QuickBooks Online and Desktop, and more.

To make more money, increase customers and better organize your company with business management software, it's important to make sure staff is trained on how to use the app and that it's implemented correctly on all devices. It's a common mistake to complete only partial training and only use familiar features, so complete training is important. Business owners should also make sure employees are entering data in a standardized way, to make sure measurements, addresses and other data don't become skewed.

LMN software is a cloud-based, SaaS (Software as a Service, such as Dropbox) software that stores customers information, manages budgets and allows contractors to set sales goals. Every business function in landscaping can be managed within the software, including estimates to help create consistency for pricing and materials. The software offers daily time management of crews, with time captured and attached directly to estimates and billing. Invoices can be sent directly, and payment processing can be managed. Customers can also use the software to apply for funding through LMN Lend.

Job progress photos can be uploaded to the app for customers to view. LMN also offers 100 on-demand training modules for contractors to use with their crews. The platform was created by lawn and landscaping contractors and has been around for more than 12 years.

Another end-to-end business management app for lawn and landscaping is **Aspire**. The software operates on a cloud-based SaaS platform accessible from any internet-enabled device and uses mobile timekeeping and communication software to connect the office to the field.

Aspire's tools allow contractors to perform estimating, scheduling, purchasing, invoicing, equipment management, reporting, job costing, payroll integration, invoicing and general CRM functions. The software can help businesses with everything from estimating and sales to fieldwork, account management and finance. Aspire is designed to reduce labor hours previously spent hunting for information, duplicating entries or responding to issues caused by inaccurate data. With improved data in one place, businesses can save time, make better decisions and become more profitable. Aspire users receive an unlimited number of logins, implementation services, lifetime support, a customer success manager and access to Aspire's resource library.

FieldRoutes is a cloud-based software and mobile app for lawn care contractors looking to run their businesses more efficiently, grow faster and acquire new customers while better serving existing customers. The platform automates company operations, including office management, advanced route optimization, payment processing, digital sales, marketing and customer acquisition. Other features include drag and drop scheduling and an online customer payment portal. More specifically, FieldRoutes has enhancements such as same-side-of-street routing to keep hoses from crossing busy streets during a job.

One of the major features of FieldRoutes is its marketing suite, which helps field service providers improve their digital presence with websites and landing pages. It can track campaign performance and sales leads. Marketing suite customers can also add additional services, such as pay-per-click (PPC), local services ads and organic search engine optimization (SEO).

Another example of an all-in-one app is **SingleOps,** which works across all divisions of a business, integrating sales, back office and the field workforce. The cloud-based software is designed to keep business owners and their workers running efficiently, from creating job estimates and proposals, scheduling and work orders, to payments and reporting on key business functions. SingleOps is easily customized to a company's needs and provides features for lawn maintenance, lawn care and design-build.

Real Green by WorkWave is a multi-use app that leverages several integrations, APIs and partnerships with other green industry companies to provide end-to-end workflows to help contractors grow and manage their businesses. Real Green's Service Assistant maintains customer records, automates daily operations and assists with marketing campaigns to help contractors spend less time on administrative tasks and improve customer service. The cloud-based, SaaS model aims to eliminate the need for an on-site IT team and keeps customers' data secure.

Jobber is another popular all-in-one lawn and landscaping app. It includes online booking, quotes and estimating, scheduling, dispatching and more.

It's worth looking at the many different lawn and landscaping business management apps out there. They tend to differ on what features they offer, what their functionality focuses on and what they cost. Think about what tasks you would most like to streamline or automate and research apps with those functions. Reading user reviews and checking out the layout and operability, even if it's only in the app store, can help with app selection.

"TO MAKE MORE MONEY, INCREASE CUSTOMERS AND BETTER ORGANIZE YOUR COMPANY WITH BUSINESS MANAGEMENT SOFTWARE, IT'S IMPORTANT TO MAKE SURE STAFF IS TRAINED ON HOW TO USE THE APP AND THAT IT'S IMPLEMENTED CORRECTLY ON ALL DEVICES."

JOB COSTING AND ESTIMATING

Business management software can aid in job costing and estimating by calculating and tracking the costs of materials, labor and overhead expenses. This data can help business owners become more profitable by providing more accurate pricing and organization of bills. One of the most popular uses of lawn and landscaping business management software is for job costing and estimating, a form of accounting.

With Arborgold, for example, users can bid on projects, schedule employees and send invoices from one central location. The app can track everyday expenses, prepare time cards for payroll and collect payments from customers. Arborgold Payments can also process credit cards, debit cards and ACH bank transfer payments from any internet-enabled device for billing, invoicing, pre-payments and accounts receivable. Business owners can get a better look at their costs and revenue real-time by creating benchmarks for labor, materials, equipment and overhead.

For estimating and proposals, Arborgold has autoprice calculations and tools to manage purchase orders, inventory and materials rates and vendor relationships. Once a job has started, Arborgold can track weather, checklists, chemicals, progress photos and more. Along the way, its project management service can help business owners better understand actual timelines and costs compared to the original plan. Advanced reporting dashboards present trends and insights to management based on key performance indicators.

Meanwhile, Aspire's job costing features allow users to track progress on projects in real time, to provide insights by division, service type, property, manager, crew leader or work ticket. The ability to monitor labor hours and expenses as they're reported allows business owners to identify potential issues and fix them before it's too late. Aspire aims to give business owners the information they need to make informed decisions for higher revenues and to avoid unnecessary expenses by identifying unprofitable jobs.

The platform supports accurate job costing in several ways. To start, the system helps ensure consistent bids by automatically factoring a company's specified markups and profits into pricing. Aspire's electronic schedule board enables real-time ticket management while also providing at-a-glance visibility into the crews' job progress. After a bid is won, the estimated material with associated costs carries over to the platform's purchasing assistant. From there, you have a clear view of material needs across projects, as well as the budget. The insight provided by Aspire enables contractors to buy what's needed while leveraging purchasing power to get the best price. Once a job is in progress, the app allows for quick and accurate reporting of labor hours and materials from the field.

All materials and equipment required for the day's jobs are always listed within the platform's Crew Mobile app to help ensure your crews get out of the shop quickly with everything they need. Users can access and log operational or visit notes, view location maps and site plans, and create, assign, or respond to issues as well as communicate these to the manager and to the customer, if necessary.

The FieldRoutes app features integrated payment processing with transparent and competitive processing rates, enhanced reporting and ACH return functionality that provides the status of every ACH transaction, as well as account updater functionality that automatically updates lost, stolen, expired and closed card payment information. The app's algorithms can help pinpoint how many times a property needs to be visited and uses measurements to improve revenues.

SingleOps allows users to create custom job types, from stump grinding to tree removal, and change quantities and other data inputs in real-time. As information from the jobsite is entered into the app, the office can see how margins are lining up and where changes need to be made. Once the less profitable tasks and jobs are identified, companies can better align their time and energy to focus on higher paying projects.

Real Green by WorkWave allows businesses to collect online payments, pre-payment and automatic payments. With the use of reminders and customer notifications, late payments are reduced, improving the company's cash flow and revenue. The app's functionality allows business owners to cut down on paper use at the office, as well.

LMN Software helps contractors understand how to make their business more profitable by using a system that will ensure accurate estimates, easy invoicing and payment, and integrates to QuickBooks.

LABOR AND HUMAN RESOURCE MANAGEMENT

Human resources encompasses many different areas of a business, including payroll, benefits, time off, insurance, workers' compensation and other legal matters. It can be a lot for any business owner to handle. That's why business management software with human resources capabilities can be so valuable. Most business management apps offer scheduling and time tracking. More advanced apps provide performance and compensation management, the ability to create employee profiles and track job applicants and more.

With advanced apps like Aspire, business owners can track, manage and report time and materials from the field while improving communication between management and crews. Workers can use the app to check in and out of tickets from the field to ensure accurate reporting of labor hours and materials for every job. Each time an employee is checked in, the time-tracking app geo-stamps their location, providing management with visibility into the jobs in progress, while also creating back-up data for billing verification, if needed.

Aspire's time-tracking app allows workers to clock in or out for the day from any smartphone or tablet, using a PIN identifier. Mobile time capture allows for real-time reporting of every employee's hours, as well as improved timesheet review and approval. Additionally, schedule changes are no longer a time-consuming challenge. All updates made to the system's schedule board are visible within the app as they occur, so supervisors always know where their crew is needed and what work to complete.

Arborgold has drag and drop scheduling features designed to improve crew and company capacity. Direct and indirect employee time tracking is available through Arborgold's mobile crew app, where businesses can record job, shop and travel time to make payroll preparation easier and more accurate for finance teams. Its time and expense tracking can improve job costing and profit margin analysis, as well.

Other popular human resources apps for the green industry include Connecteam, which allows users to color code jobs, has GPS and geofencing time tracking capabilities, and can change or add important employee information in real time.

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FLEET AND ROUTING MANAGEMENT

Using route optimization software can help workers get to jobsites faster, reduce time on the road and create additional time for more stops. The fleet management technology available with business management software goes beyond simple mapping. There are many ways fleet management and routing improvements can help businesses run smoother.

FieldRoutes' route optimization software, for example, uses a proprietary combination of third-party routing technologies. The software can plan around preferred dates, times, technicians and due dates. Speed limits, driving directions, stops for breaks and final destinations, among other factors, can be mapped out using FieldRoutes' technology. This can be helpful when a technician with a specific skill set is needed on some jobs but not others. Routes can also be planned according to material capacity. The capacity per route feature can set routes according to a vehicle's chemical capacity for jobs that need fertilizers and other pesticides. Also, routing for hazmat trucks keeps vehicles off roads where hazardous materials are prohibited.

Aspire's platform also offers fleet management and route optimization. It allows users to view asset inventory by entering and tracking vehicles and equipment in many ways: by manufacturer, size, model, class or by route. The vehicle and equipment tracking also allows business owners to keep up to date on maintenance and identify any inventory gaps.

Once vehicles and other assets are entered, the hours and/or miles logged in the system will automatically trigger maintenance alerts at the intervals specified. The crews can send requests for service to the fleet manager or mechanic when equipment issues are encountered in the field. Aspire also tracks details related to service performed, including date, type of service, technician, cost and hours as well as additional comments and an updated reading log, if needed. Additionally, Aspire will run depreciation reports and track disposal dates for phased out equipment and vehicles.

Arborgold's fleet management functionality is integrated with Google Maps and GPS location services, and schedules jobs according to distance and location to keep drivers from traveling long distances throughout the day. Doing so makes crews more efficient and saves money on fuel.

WorkWave's Real Green has a routing assistant system that provides technicians with a schedule of service addresses with multiple views and format filter options to customize tasks.

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MARKETING FUNCTIONALITY

There's no question that marketing is essential to business success. Effective marketing takes time and effort, whether it's designing and distributing fliers or creating and writing a blog. When business gets hectic, however, marketing tends to go to the wayside. A business management app with marketing functionality can make the process more efficient and save lots of time.

By storing the customer data needed for invoicing in the same platform as marketing software, you can incorporate those names and addresses into direct mail and other promotions. Email addresses, with permissions, can be used for sending company newsletters. Or when sending invoices, customers can be directed to visit a website or social media page.

FieldRoutes creates green-industry-focused websites and landing pages for lawn and landscaping contractors that can increase sales

leads and measure campaign performance. It can also help with creating and maintaining social media channels, which can lead to positive online reviews.

The Aspire platform also provides marketing services. First, it allows users to bulk-enter contacts, add custom fields for easy filtering, categorization and tagging. This allows business owners to view the status of potential clients and monitor sales progress.

Arborgold's marketing and sales automation features collect new leads online, route new leads to the sales teams in the field, automatically sends follow-up emails, texts SMS and delivers voice broadcast marketing messages.

A BUSINESS MANAGEMENT APP WITH MARKETING FUNCTIONALITY CAN MAKE THE PROCESS MORE EFFICIENT AND SAVE LOTS OF TIME.

TRAINING AND EDUCATION FEATURES

Most business management apps come with training features to get everyone up to speed and using the software. Some services offer online or in-person training when businesses begin to use the apps. There are also online training videos to learn how to use them.

When it comes to continuing education and lawn and landscape training, there are many websites available. Most colleges that teach green industry courses offer some type of online education, whether it be downloadable manuals through the National Association of Landscape Professionals or videos on YouTube. Online courses about more specific tasks, such as hardscaping, are available on websites like Hardscaper.com. An online search for tasks often yields several training options.

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NON-INDUSTRY, COMPATIBLE APPS

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There are many other apps on the market that can offer your business time-saving features. One of the more popular ones is QuickBooks, which provides accounting software for payroll and taxes. Many of the lawn and landscaping business management apps listed previously integrate with QuickBooks for greater efficiency.

Weather forecasting apps, like The Weather Channel's free app, are popular with many lawn and landscaping companies for providing alerts, maps and rain tracker features. Leafsnap allows users to take photos of plants to identify them for better care. The CompanyCam app posts job progress photos for customers to help document work orders. There are countless others available, as well.

There is a business management app for almost any type of task a company might need to perform. Some are free, while others charge subscription fees. With anything, you typically get what you pay for, so a free app might not be the best option for your business. Keep in mind that the best apps should make tasks simple.

As Arborgold suggests, before investing in any business technology, it's crucial to develop a wish list of "must-haves" from a variety of stakeholders before investigating products within the market space. Included in that list may be intangibles such as industry specialization, reputation, access to live customer support, individualized training options and more. Try a few to find the best system for you and your company's needs.

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