



Tradies Technology Checklist

Here is a list of the key items we focus on when working with our clients. This makes up the "Business Operating Platform" that will become the most valuable and most used tool in your toolbag....

☐ Devices

Think of your devices as the tools used to access and record your business data: phones, tablets and desktops or laptops. Having these tools setup to work together is critical so you know you can access your data from any device at any time. Obviously knowing how to operate your tools is important as well, so spend some time on learning how to use them to their potential.

Correct setup of the devices and associated accounts (Eg iCloud and Google accounts) can enable sharing of valuable data and automated backups that can save serious dramas in case of disaster.

☐ Network

Mobile devices and cloud software need a network to operate so make sure you're with a network provider that suits your needs for where you operate now and into the future. Having a bad connection is not only frustrating but also really bad for business. You have a number of choices if you work in suburban areas but anyone working in regional areas really only have one option.

Most providers also have business teams now so get connected with them so you know you have a point of contact if you need assistance with things like new devices, billing dramas or network issues. This can save hours of frustration on the phone speaking with an offshore support team.

We work with a heap of the business teams around the country now and are more than happy to point you in the right direction and provide an introduction.

☐ Communication Platform

Having a business related email address is a must, no hotmail, optusnet or bigpond email addresses allowed! If you don't already have one, get yourself a domain name (and a simple but effective website) so you can demonstrate you're a modern business. Once you have a domain name you can setup an email and cloud storage platform that gives you synchronised email and files across all devices, Google Apps is perfect for this!

There's no need for wasting time deleting the same email off 3 different device or having to go back to the office to find the email you sent to the engineer last week or the latest set of plans.



☐ Operating Software and Financial Software

This is the core of the Business Operating Platform and the most important to get right. Your Operating Software is used to manage client records, job/project information, scheduling, and staff collaboration. Financial software manages the incoming and outgoing financial data and tells you if you're making any money. Having these 2 components talking to each other is super important to help eliminate any inefficient double entry of data.

There's a huge range of Job and Project Management solutions out there now that all look similar on the outside but vary widely inside. Making the wrong decision here can cost you considerable time before you discover you've gone down the wrong track so don't rush the decision.

A few key things to consider are:

- Keep it simple Bells and whistles are great but sometimes it not worth the time it takes to use them all for the info they provide. Don't get sucked in by gimmicky features.
- Accessibility/functionality from the field Do I need someone in the office running this thing or can I stay on the tools and run it from the road. A very important decision.
- Scalability Am I able to upgrade when I grow the business to the size I'm planning?

In regards to the Financial Software, integration is the key. Make sure that the Operating Software you're looking at will integrate as completely as possible. Look at invoicing integration but also purchasing integration. Being able to log a cost/bill against a job and have that automatically appear in your accounting software saves massive amounts of time in data entry.

☐ Apps to fill the gaps

Finding one app/solution that can do it all is very rare so be prepared to use some other smaller apps to build yourself the tailored solution to exactly fit your needs. Things like form builders, photo editing, report creation, and plan management can be worked into the solution to achieve exactly what you're looking for.

☐ Training and Education

Spending some time and money on training is a very valuable investment and will fast track your journey to embracing the technology. If you're busy running the business don't fool yourself into thinking you'll find the time to learn it by yourself, it just won't happen. Having a 3rd party provide some structured training makes you commit to the cause and can help your staff manage the change a little easier as well. Don't make it harder than it needs to be, we all know how frustrating technology can be if you don't know what you're doing.

The very nature of cloud based solutions means that they are constantly evolving, so keeping on top of the new features, functionality and options can be a full time job. Commit some time on an ongoing basis to continuing the education and keeping your finger on the pulse.

Contact us now if you need help with any or all of the items listed above.

We would love to conduct a scoping session and help you to

"Lose The Paperwork, Find The Time"

