



SIMPRO®

SELECTING A FIELD SERVICE PLATFORM

Evaluation Criteria Across Workflow, Adoption,
and Scale + Questions to Ask.



Software decisions shape how your business operates over time. Evaluation should extend beyond surface functionality and test how work actually moves through the system.

1 Demonstration Discipline

Book more than one demo. Compare vendors directly. Ask to see your real workflows inside the system.

Questions to ask:

- Can you walk through quote → job → invoice → payment → in one continuous flow?
- How does the system handle commercial billing, retention, and staged invoicing?
- How are recurring jobs and asset histories managed?
- Can you show reporting from a real job, not a sample dashboard?
- How do accounting and payment integrations function in practice?

If workflows cannot be demonstrated clearly, they will not operate clearly.

2 Workflow Continuity

Evaluate how information moves between estimating, scheduling, field work, billing, and reporting.

Questions to ask:

- Does field documentation flow directly into billing?
- an staff schedule, raise purchase orders, capture materials, and invoice without switching systems?
- Does accounting sync without manual reconciliation?
- Are payments integrated within the workflow?

Rework at the end of a job is a sign of workflow fragmentation.





3 Field Adoption and Mobile Execution

Field usage determines billing accuracy, reporting reliability, and administrative load.

Questions to ask:

- Is full job and asset history available on mobile?
- Does the mobile app function offline?
- How are time, materials, photos, and forms captured in the field?
- Are digital forms usable and configurable?
- Can documentation be completed efficiently on-site?

If technicians work outside the system, the office absorbs the correction work later.

4 Catalog Structure, Pricing, and Pre-Builds

Margin consistency depends on standardized inputs.

Questions to ask:

- How are supplier catalogs structured and maintained?
- Are supplier price updates automated?
- How are pre-builds created, stored, and reused?
- Can pricing be standardized across estimators?
- Does job costing tie directly back to structured estimates?

Catalog discipline is foundational to reliable margin visibility.

5 Commercial and Recurring Work Capability

Commercial environments introduce layered billing and asset complexity.

Questions to ask:

- Is retention tracked natively?
- Can staged or schedule-of-values billing be handled inside the system?
- How are recurring invoices configured and monitored?
- Can asset history, maintenance schedules, and compliance documentation be managed without external tools?
- How are multi-entity clients supported?

Complexity should be absorbed by the platform, not external spreadsheets.

6 Implementation Approach

Implementation affects adoption, data quality, and long-term reporting integrity.

Questions to ask:

- How is data migration handled? Is data cleansing addressed before import?
- Is rollout structured in phases?
- What training is included, and how is it tailored to operational roles?
- Who is responsible for configuration and workflow design?
- What post-go-live optimization support exists?

Adoption is behavioral. Structure and sequencing matter



7 Implementation Team and Ongoing Support

System capability and support quality are equally important.

Questions to ask:

- Who will lead implementation?
- What industry experience does the implementation team have?
- How are issues escalated?
- What support channels are available?
- What response times can be expected?

Support reliability reduces operational risk.

8 Data Visibility and Reporting Integrity

Reporting should reduce interpretation, not require it.

Questions to ask:

- Is job-level margin visible before job close?
- Can recurring revenue be clearly demonstrated?
- Does reporting require manual exports or reconciliation?
- Can leadership rely on system data without secondary spreadsheets?

Operational visibility strengthens decision-making and financial control.

9 Practical Use of AI

AI should improve clarity and reduce administrative effort within existing workflows.

Questions to ask:

- Where does AI assist documentation or work notes?
- Does AI improve data consistency?
- Are AI features embedded in existing workflows?
- How is data governance and transparency handled?

AI should reinforce disciplined operations, not introduce new complexity.

10 Scalability and Enterprise Readiness

As businesses grow, systems must reduce dependency on individuals and increase process consistency.

Questions to ask:

- Can pricing and estimating be standardized across teams?
- Does the system reduce reliance on key individuals?
- Can operational reporting withstand financial review?
- Does recurring revenue tracking provide clear visibility?
- Is knowledge embedded in the system rather than in memory?

Software decisions compound. Evaluate not only current fit, but long-term operational impact.



Feature availability matters, but **operational alignment** matters more.

Selecting field service software is ultimately a decision about how a business will operate as it grows.

Feature availability matters, but operational alignment matters more. Platforms differ in how they support field execution, commercial workflows, reporting integrity, and long-term scalability.

Buyers should evaluate not only what a system can do today, but how well it will support the business as complexity increases.



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