



SIMPRO 

THE OPERATIONAL MATURITY MODEL FOR TRADES BUSINESSES

A practical way to assess how
your business is running.



Trades businesses rarely stall because of skill. They stall because the systems underneath the business can't support growth.

Level 1: Manual & Memory-Driven

The Business Lives in People's Heads.

What It Looks Like

- Paper job sheets or scattered spreadsheets
- Scheduling handled informally
- Billing rebuilt manually
- Profitability estimated, not tracked

What Limits Growth

The more work you take on, the more pressure falls on a few key people.

What It Feels Like

If one person is out, everything slows down.

Level 2: Organized but Reactive

Digitized – But Still Discovering Problems Late.

What It Looks Like

- Digital job cards and scheduling
- Time captured electronically
- Basic invoicing and reporting
- Accounting connected

What Limits Growth

You can see what happened — but only after the job closes.

What It Feels Like

Revenue is growing, but surprises still show up at month-end.





Level 3: Fragmented Visibility

Multiple Tools. Growing Admin Load.

What It Looks Like

- Quoting in one system
- Scheduling in another
- Inventory loosely tracked
- Reporting requires exports
- Billing rebuilt at the end

What Limits Growth

Information exists — but it doesn't flow cleanly.

What It Feels Like

The business looks sophisticated, but admin workload keeps climbing.

The Plateau Effect

Level 3 is where many trades companies plateau. The appearance of digitization is there, but disconnected systems force the office to act as the bridge between software products, choking operational speed.





Scaling Operations

Level 4: Unified Operating Platform

Connected Workflows. Clear Margin Visibility.

What It Looks Like

- Quoting, scheduling, job costing, billing, and inventory connected
- Field updates visible in real time
- Margin visible before invoicing
- Reporting trusted without spreadsheet overlays
- Commercial and residential managed in one environment

What Changes

Growth increases clarity instead of chaos.

What It Feels Like

If one person is out, everything slows down.

Level 5: AI-Enhanced Operations

AI does not fix operational disorder. Instead, it strengthens operations that are already connected.

What It Looks Like

- Standardized pricing and documentation
- Clean job data across the business
- Reliable reporting

What Becomes Possible

- Work notes generated faster
- Margin anomalies surfaced earlier
- Labor patterns identified sooner
- Insight available before month-end.

What It Feels Like

The business gains time back. Decisions happen faster. Problems surface earlier.





Quick Self-Assessment

Ask yourself these 5 questions about your current setup:

1 Where does critical knowledge live — inside the system or inside people?

2 Can you see job-level margin before a job closes?

3 Does billing require reconstruction?

4 Does reporting require exports?

5 Does growth increase clarity — or administrative pressure?

Your answers will tell you where your business sits today — and what your current system can realistically support.





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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