

Trade Finance in Ten Podcast: Episode 13 Summary

Bootcamp Checklist Part 4 - Operations & Technology

1. Why Today's Topic Is Important

The systems you put in place early become the foundation your team builds on. Learning software while you're solo is much easier than learning it when you're busy, training new hires, and still running jobs at the same time. A lot of contractors pick software early on that is free or inexpensive, only to have to change it later at a big cost to labor, customers, and morale.

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2. Key Takeaways

- Accounting software is essential for most businesses from day one. Pay for it now or pay later when you're sorting through chaos at tax time or trying to onboard new hires.
- Field management (dispatch) software should integrate with your accounting software and payroll to reduce errors and double entry.
- Many owners don't think long-term when choosing software. Make sure what you select today can still support your business as it grows.

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3. Action Steps to Consider

- ☐ Double-check that your accounting software will support you long term. Does it integrate with your field management software and payroll?
- ☐ Download the free checklist on our website for suggested questions to ask when choosing field management software. It's not all-inclusive, but it will help bring up questions you may not have thought to ask.
- ☐ Confirm that your payroll software integrates with both your accounting and dispatch software. Manual entry is an easy place for mistakes, and payroll errors are one of the fastest ways to lose technician trust.
- ☐ Visit myhvacoffice.com/free and myhvacoffice.com/resources for tools mentioned.

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