Encircle

Restoration Software:
Evaluation Checklist

Here's a checklist of criteria to use when evaluating new tech for your biz - are you ticking all the boxes?

Is it worth it to make a switch?
Will the cost of the new technology be worth it in the long run because of added efficiency? How much time is currently being wasted doing things manually?

Have you leaned on your network for suggestions?
Does the system you're considering have a good reputation in the industry? Is it reliable? Talk to your peers - someone who's on your level, with a similar size business dollar and team!

Are free trials and flexible contracts available?
Are you able to test out the software before you buy it and pilot it in a real-world situation? Make sure you're confident and familiar with what you're purchasing before you sign anything!

Is onboarding straightforward and easy?
Is the solution easy to train your team on and will the vendor help onboard your team onto the new solution? Will someone be available to help you should any needs arise in the future?

Are training materials, educational resources, and tech support easily available?
Look for vendors that provide additional educational content, a dedicated onboarding manager, or have a built-in learning platform. With the labor shortage so rampant, you're going to want to shorten the learning curve as much as you can!

Will the app work well in the field?
The app needs to be versatile, it has to work for the folks back at the office, but the most important step is that the data needs to be collected by a tech, from the loss, right away - look for solutions built with the field in mind!

Will the software scale with you as your company grows?
The needs of your organization will scale over time - can the software scale with you?

Does it integrate with the other tools you use and help with real-time data flow?
Sometimes the idea of setting an integration up can be overwhelming - but think how worthwhile it will be to eliminate duplicate data entry for your team!

Looking for more learnings?
Check out our top 5 free educational resources battle tested by thousands of restorers, everything from a Water Damage Bootcamp to how to grow your business on program work!