



Field Service Software Decision Workbook

Use this workbook with Jobber, Housecall Pro, ServiceTitan, or any other field-service platform. It should leave you with a shortlist, comparable costs, test evidence, and a signed decision record. You do not need to contact 2Labs to complete it.

Prepared for: _____ Prepared by: _____

Started: _____ Decision due: _____

Rules for a fair comparison

1. Fill in pages 1–3 before any demo.
2. Give every vendor the same five scenarios and sample data.
3. Record the exact plan and add-on used. A roadmap promise is not a pass.
4. Have one office employee and one field employee operate each finalist without vendor coaching.
5. Reject a vendor that fails a deal-breaker, even if its score is higher.
6. Attach current proposals and contract terms. Pricing and packaging change.

Evidence codes: T = our team tested it; D = vendor demonstrated it; W = confirmed in writing; U = unknown. Prefer T, then D or W.

Rating: 1 fails; 2 major workaround; 3 acceptable; 4 clean; 5 clean with exceptions and controls understood.

Page 1 — Business and role snapshot

Business/trade: _____ **Service area/radius:** _____

Work mix: ☐ Residential ☐ Commercial ☐ Projects ☐ Recurring ☐ Emergency ☐ Installation

Jobs/month: _____ **Peak months:** _____ **Longest normal drive:** _____

Three problems this purchase must solve

1. _____ Baseline measure: _____
2. _____ Baseline measure: _____
3. _____ Baseline measure: _____

Role	Now	12 mo.	36 mo.	Full / limited / read-only access	Must test?
Owner/manager					☐
Dispatch/office					☐
Estimator/sales					☐
Field technician					☐
Bookkeeper					☐
Seasonal/subcontractor /other					☐

Quote counts now: Field _____ Office _____ Limited/read-only _____ Seasonal _____

Expected quote counts at 36 months: Field _____ Office _____ Other _____

Current systems and data

Area	Current tool/process	Keep / replace / unsure	Data that must move
Schedule and customer records			
Estimates, pricebook, job history			
Accounting and payments			
Phones, texting, routing			
Forms, photos, reports, other			

Budget ceiling, year 1: \$ _____ **Rollout limit:** _____ weeks

Internal owner: _____ **Hours available/week:** _____

Common low/no-signal areas and devices: _____



Page 2 — Five workflow requirements

Write outcomes, not feature names. Example: "Move an urgent call into a full day, notify the customer, and preserve the original appointment history."

#	Real scenario and trigger	Required office + field actions	Required customer/accounting result	Current failure	M / S / N	Success measure
1	Urgent call while schedule is full					
2	Estimate with options and approval					
3	Recurring visit, project, or common job					
4	Low-signal field job and reconnect					
5	Invoice, payment, accounting correction					

M = must-have; S = should-have; N = nice-to-have.

Low-signal definition for scenario 4

Job details that must be available before signal drops: _____

Actions that must work without service: ☐ View history ☐ Notes ☐ Photos ☐ Forms

☐ Time/material ☐ Estimate ☐ Signature ☐ Invoice ☐ Payment ☐ Other: _____

Actions allowed to wait for reconnect: _____

Required reconnect result: _____

Deal-breakers

A failed deal-breaker removes the vendor unless a safe, affordable workaround is approved in writing.

#	Deal-breaker	Test or document required	Vendor A	Vendor B	Vendor C	Vendor D
1			☐ P ☐ F	☐ P ☐ F	☐ P ☐ F	☐ P ☐ F
2			☐ P ☐ F	☐ P ☐ F	☐ P ☐ F	☐ P ☐ F
3			☐ P ☐ F	☐ P ☐ F	☐ P ☐ F	☐ P ☐ F
4			☐ P ☐ F	☐ P ☐ F	☐ P ☐ F	☐ P ☐ F
5			☐ P ☐ F	☐ P ☐ F	☐ P ☐ F	☐ P ☐ F

Possible deal-breakers: accounting accuracy, required payment method, role permissions, device support, offline action, data export, legal/security obligation, or a firm cost/contract limit.



Page 3 — Vendor setup and same-scenario demo record

Vendor columns stay the same throughout the workbook.

Vendor	A	B	C	D
Name				
Exact plan				
Required add-ons				
Quote date / expires				
Contract term				
Evidence folder/link				

Five-scenario record

For each cell, write rating / evidence code / workaround count. Example: 4/T/1. Add the exact tier or add-on in the notes if it differs from the quote above.

Scenario	Pass condition	A	B	C	D
1. Urgent call	Employee reschedules, dispatches, and sends the right notice				
2. Estimate + field record	Options, approval, photos/forms, and changes stay attached to the job				
3. Recurring/common work	Next visit, agreement/project status, and owner view are correct				
4. Low signal	Airplane-mode actions work; reconnect has no hidden loss or duplicate				
5. Invoice + books	Customer, item, tax, deposit, payment, refund, and duplicate prevention are correct				

Test data used for every vendor: Customer/address _____ Service/item _____
Tax/deposit/payment method _____ Accounting file/test company _____

Exceptions and coaching

Vendor	Steps employee could not complete alone	Vendor coaching or workaround	Missing/roadmap item	Follow-up owner/date
A				
B				
C				
D				

Do not hide friction in the average. A “5” requires that the employee completed the work, not that the salesperson completed it quickly.



Page 4 — Low-signal pilot and adoption check

Put the test phone in airplane mode. Use a normal job already loaded on the device. Reconnect only after completing the required offline actions.

Low-signal test	A	B	C	D
Correct job/history visible?	☐ Y ☐ N	☐ Y ☐ N	☐ Y ☐ N	☐ Y ☐ N
Required notes/time/material saved?	☐ Y ☐ N	☐ Y ☐ N	☐ Y ☐ N	☐ Y ☐ N
Required photos/forms/signature saved?	☐ Y ☐ N	☐ Y ☐ N	☐ Y ☐ N	☐ Y ☐ N
Estimate/invoice/payment behavior acceptable?	☐ Y ☐ N	☐ Y ☐ N	☐ Y ☐ N	☐ Y ☐ N
Queue or offline state visible to technician?	☐ Y ☐ N	☐ Y ☐ N	☐ Y ☐ N	☐ Y ☐ N
Office can see incomplete sync/failure?	☐ Y ☐ N	☐ Y ☐ N	☐ Y ☐ N	☐ Y ☐ N
Reconnect completed without loss/duplicate?	☐ Y ☐ N	☐ Y ☐ N	☐ Y ☐ N	☐ Y ☐ N
Two-user edit/conflict behavior tested?	☐ Y ☐ N	☐ Y ☐ N	☐ Y ☐ N	☐ Y ☐ N
Rating 1–5 / evidence code				

Written answers still needed: What does not work offline? How long is data cached? Do routing, SMS, signatures, card payments, or financing need service? How are conflicts resolved?

Finalist pilot log

Check	Finalist 1: _____	Finalist 2: _____
Office tester / device / date		
Field tester / device / date		
Five workflows completed without coaching	☐ Yes ☐ No	☐ Yes ☐ No
Time to complete normal job		
Errors, duplicate entry, or workarounds		
Training still needed		
Tester would use it on a busy day	☐ Yes ☐ No	☐ Yes ☐ No

Pilot decision: ☐ Continue both ☐ Eliminate finalist 1 ☐ Eliminate finalist 2 ☐ Retest

Reason/evidence: _____



Page 5 — Comparable 12- and 36-month cost

Use the same user counts, job/payment volume, labor rate, and growth assumptions for every vendor. Do not rank a quote with unresolved required items.

Shared assumptions: Field users now/36 mo. ____/____ Office users now/36 mo. ____/____
Jobs/month ____ Card volume/month \$ ____ ACH volume/month \$ ____ Internal labor \$ ____/hr

Enter 12-month and 36-month totals in each cell as 12 / 36. Include tax where applicable.

Cost item	A	B	C	D
Subscription and all user types	\$ / \$	\$ / \$	\$ / \$	\$ / \$
Required add-ons and usage (phone/SMS/AI/forms/GPS)	\$ / \$	\$ / \$	\$ / \$	\$ / \$
Onboarding, migration, cleanup, training	\$ / \$	\$ / \$	\$ / \$	\$ / \$
Accounting/API/integration/middleware	\$ / \$	\$ / \$	\$ / \$	\$ / \$
Card/ACH/refund/chargeback costs	\$ / \$	\$ / \$	\$ / \$	\$ / \$
Devices, hardware, and internal staff time	\$ / \$	\$ / \$	\$ / \$	\$ / \$
Promotion expiry and renewal allowance	\$ / \$	\$ / \$	\$ / \$	\$ / \$
Exit/export/transition allowance	\$ / \$	\$ / \$	\$ / \$	\$ / \$
Total	\$ / \$	\$ / \$	\$ / \$	\$ / \$
Unknown/unquoted required items (count)				

Output	A	B	C	D
Year 1 total	\$	\$	\$	\$
Year 2 run rate	\$	\$	\$	\$
36-month total	\$	\$	\$	\$
Year 1 cost per active technician	\$	\$	\$	\$
Year 1 cost per completed job (optional)	\$	\$	\$	\$
Comparable now?	☐ Y ☐ N	☐ Y ☐ N	☐ Y ☐ N	☐ Y ☐ N

Quote gaps and owner/date to resolve: _____



Page 6 — Weighted score and shortlist

Set weights before reviewing scores. They must total 100. Rating (1–5) × weight = points; total points ÷ 5 = score out of 100. A failed deal-breaker still means **do not select**.

Criterion	Suggested weight	Our weight	A rating / points	B rating / points	C rating / points	D rating / points
Five-workflow fit	25		/	/	/	/
12/36-month cost	15		/	/	/	/
Low-signal reliability	15		/	/	/	/
Office and field adoption	15		/	/	/	/
Accounting and payments	10		/	/	/	/
Dispatch, routing, communication	5		/	/	/	/
Recurring/project/pr ofitability needs	5		/	/	/	/
Integration and export	5		/	/	/	/
Implementation and support	5		/	/	/	/
Total	100	_____	/500	/500	/500	/500
Score / 100						

Vendor	Deal-breaker pass?	Evidence confidence H/M/L	Comparable cost?	Final pilot?
A	☐ Y ☐ N		☐ Y ☐ N	☐ Y ☐ N
B	☐ Y ☐ N		☐ Y ☐ N	☐ Y ☐ N
C	☐ Y ☐ N		☐ Y ☐ N	☐ Y ☐ N
D	☐ Y ☐ N		☐ Y ☐ N	☐ Y ☐ N

Two finalists: 1. _____ 2. _____

Evidence gaps that could change the order: _____

Interpretation

- Eliminate failures first.
- Resolve unknown required costs before calling prices comparable.
- Prefer tested employee results over sales demonstrations.
- If scores are close, choose based on the original operating problem, implementation capacity, and accepted risk rather than adding more features to the score.



Page 7 — Contract, security, implementation, and exit gates

Mark Pass, Fail, or Accepted risk (AR). Put evidence or an owner/date beside every blank or AR.

Gate	A	B	C	D	Evidence, risk, or owner/date
Exact plan, users, add-ons, usage fees match demo					
Promotion, renewal method/date, notice, auto-renewal clear					
Minimum term, cancellation, early termination clear					
Payment rates, deposits, refunds, chargebacks clear					
Migration scope, cleanup, training, staff hours assigned					
Pilot, phased launch, go-live support, rollback documented					
Support channels, hours, escalation documented					
MFA, roles/least access, audit log tested					
Device loss, subcontractor removal, payment duties reviewed					
Retention, recovery, breach notice, legal needs reviewed					
Customer, job, invoice/payment, pricebook exports tested					
Agreements, photos/forms/attachments, reports retrievable					
Post-cancel access, export fees, payment transition clear					

Internal implementation owner: _____ Vendor owner: _____

Pilot dates: _____ Go-live target: _____

Security/privacy reviewer: _____ Contract reviewer: _____

Conditions before signing

- [] _____
- [] _____
- [] _____
- [] _____

Accepted risks: _____



Page 8 — Final decision and 30/60/90 measures

Selection record

Selected vendor/plan: _____

Required add-ons: _____

Quoted users: Field _____ Office _____ Other _____

Year 1 total: \$ _____ 36-month total: \$ _____

Contract term: _____ Renewal date/notice deadline: _____

Why it won (cite tests, costs, or contract evidence):

1. _____
2. _____
3. _____

Accepted risk	Why accepted	Owner	Review date

Implementation owner: _____ Pilot start: _____ Go-live: _____

First crew/location: _____ Rollback plan: _____

30/60/90 measures

Choose measures tied to the three problems on page 1. Record the calculation method so the baseline and targets stay comparable.

Measure	Baseline	Day 30	Day 60	Day 90	Owner
Missed/unreturned calls or leads					
Request-to-scheduled time					
Drive time or miles/job					
Job-complete-to-invoice time					
Days to payment					
Jobs with complete notes/photos					
Accounting corrections/duplicates					
Job margin known within ____ days					
Other: _____					

Reviews scheduled: 30-day _____ 60-day _____ 90-day _____ Renewal _____

Who receives the results: _____

Sign-off

Owner/manager: _____ Date: _____

Office/dispatch: _____ Date: _____

Field lead: _____ Date: _____

Bookkeeper/reviewer: _____ Date: _____

Final note: A signature does not turn an unresolved requirement into a pass. Keep this workbook, current proposals, test evidence, and the signed order form together as the decision record.