

5 Key Considerations When Choosing Estimating Software

By:

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Estimating can make or break your business. Incorrect data, human error and mathematical mistakes can eat into your job profitability. Many contractors turn to estimating software platforms to help improve their accuracy and efficiency, but the role of estimating is so important that choosing a new software is a decision that shouldn't be made lightly. Here are five things from Estimating Edge leaders Joe Pettit and Mike Mouw that contractors should consider when looking for an estimating platform.

1. Longevity, Experience and Innovation

Contractors considering software need to take into account a technology company's track record and experience in the industry. By learning the history of companies like the Estimating Edge, it helps build a relationship and understanding of what the company can do for your roofing business. Estimating Edge has been committed to excellence in estimating for roofing contractors for over 30 years.

They were founded in 1986, the year Microsoft had its initial public offering (IPO) that cemented the company as a leader in computer software and operating systems. Microsoft[®] Excel[®], as we know it today, did not exist yet. In fact, the Windows[®] operating system was brand new, having been released in November 1985.

Estimating Edge founder, Lee Cursons was a seasoned contractor who was keeping an eye on the emerging world of computers and technology. He was thinking about how it could help him in his business—particularly for developing estimates and shop drawings. In 1986, he founded Estimating Edge to do just that.

Joe Pettit, senior training & support specialist, joined the team in 1989, coming out of a career in construction. “When I started, they were getting ready to release version 5.5 of the program, DOS 3.3 had just come out, and the screens were just changing from amber and green to using VGA and color monitors,” explained Pettit.

Right from the start The EDGE[®] allowed contractors to digitize drawings. “Back in the very

beginning, it was an electronic Sonic Digitizer that worked off sonic ultrasound waves. So, if you had a bump in your drawing sometimes it would mess up the coordinates that it would give you,” said Pettit. “Then we had transitioned to electronic digitizers, which were kind of like a big electronic drafting table with a little electronic grid underneath it and you would use an electronic pen to work with your blueprints that way.”

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In those early years, Pettit said that many contractors were excited about the technology and for many, that was the first computer in their offices. “Back then we even sold computers because so few people knew what to buy,” said Pettit.

Mike Mouw joined the team in 1999 when The EDGE for Windows had just rolled out. He currently is managing the Tech Support and Training departments. He brought with him a knowledge of construction, having worked in his family’s construction business, but little knowledge of computers. “I learned how to use a computer

in about five days, and then I learned The EDGE in another three to six months with Joe’s help, and then began helping others use the program,” Mouw explained.

Pettit and Mouw have seen the company continue to develop new features, solutions and program enhancements. Pettit says that just because a company has been around a long time does not necessarily mean that it’s a good company. Contractors need to see that the company is evolving as technology evolves and continuing to innovate. “A computer-related company that has survived all these years, definitely says a bit for the program and for the organization,” Pettit said.

2. Partnerships, Support and Training

There isn’t one software platform that can do everything for a contractor’s business. That’s why it is so important to consider integrations and communications between software programs that are being used in the business. If your programs cannot talk to each other and share information, that increases the risk for errors, not to mention the inefficiency of double data entry.

“We’re getting more corporations and companies to partner with us, so that we can actually tap into their technology workspace and data,” explained Mouw. “In today’s environment, being open-sourced is one of our top priorities.”

It is also important to think about your overall business goals. “Think through what you need in your company, not just for today but what you think you will need three to five years down the road. Whatever you purchase will need to be able to grow with you,” advises Pettit.

Customer support is also key says Mouw.

“They want someone to talk to, especially in this environment. It’s a, ‘I need something very, very soon. The bid is due. I have an issue.’ and that phone is right there, so it’s great to be able to get help quickly and that’s one of the things we do so well,” explained Mouw.

The depth and breadth of Pettit and Mouw’s experience and knowledge is invaluable to users of The EDGE. If there is an issue or situation, they have most likely seen it and solved it.

3. Customization and Training

The EDGE provides contractors with a database that is ready to use right out of the box. “Every company has the ability to modify it and customize it to fit their company and customize it for their processes,” explained Pettit.

Mouw agrees that the customization is important, saying, “It is a big deal because we really don’t want to change the way a company does things, we really do want to help them and guide them into maybe a better flow. And that better flow is really what they’re after.”

Support and training during the implementation of The EDGE is key to success. It follows a set process. The contractor is learning the product and they also need to move certain data around, and to do it effectively it has to be done in a one-on-one environment.

“We work with the estimating team to bring everyone together,” said Mouw. “Many times in companies the different estimators go off on their own tangents. That’s why we work so closely with the team during implementation. Everyone agrees on the new process, which does look a little like their old method but now they benefit from the

technology, the streamlining, and we get everyone on the same page,” explained Mouw.

“The setup phase is critical, so we take the time to hear the client out, to learn about what their specific needs are and at the end of the day, they know that The EDGE is a trusted part of their team,” said Mouw.

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Mike Mouw—Training & Support Manager, Estimating Edge

4. Security, Access to Data, Backups

With cloud-based platforms, manually backing up data is a thing of the past. Online security should be a consideration when choosing software and you will want to ask about the company’s security controls. Ask questions such as, where your data will be stored, who has access to the data and what third parties, if any, do they work with to host and

store your data. It's also important to understand the company's backup and recovery processes.

Pettit explained that The EDGE handles security and backups for the customer saying, "Customer data is on an IBM® service cloud separate from other IBM customers and is encrypted with multiple layers of security."

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Beyond the security of your data in the cloud, you need to consider the vulnerability of your information should an employee leave. If an employee had the administrative access level to be able to export information from the program, a company could be at risk of them taking sensitive customer information with them to their new job. That isn't the case with The EDGE.

"If someone were to export the database or the jobs and then go to another company, they would not be able to open that information at that other company," said Pettit. "That's a new feature to

version 12 of our software that adds one more level of security for our customers."

5. Find Your Inside Champion

Pettit advises that contractors considering implementing a new software need to identify one or two key employees who are onboard with the idea and can serve as the champion for the software. "Contractors need to ask themselves if they have someone who's going to operate the program," said Pettit. "It's one thing for the owner of the company to decide to get the program, but if all of the estimators are working 10 to 12-hour days, and they're on some sort of commission, who is going to use it?"

Talk to your team to see who is interested in finding a better solution and an improved process. Have them be part of the selection process. "They need to understand that in the beginning it will be a little bit slower, but after that it will be a whole lot faster," Pettit said. "It has to be someone who knows the company well enough to be able to help set things up without bringing the entire company into it. Once the database is customized for your company it makes it much easier to bring the other estimators onboard."

Mouw says that once people see it and realize the benefits, the rest of the team tend to gravitate toward it. "The EDGE is just one of those programs that organizes data so well," said Mouw. "It's easy to understand, it's easy to flow through the normal processes. Once they realize everything this does for the data they are working with, organizing it and making it easy to get back to later, they want to use it."

Mouw and Pettit both agreed that feedback from contractors using the program is filled with praise. “I hear it all the time; that most of them say they would never want to go back to something they had previously,” stated Mouw. “They find something that just pushes them to that next plateau, and they thrive on that.”

Pettit hears that same feedback. “I hear regularly from contractors, especially those that have taken a few years to decide to move forward, that they wish they would have made the switch sooner.”

Experience the Estimating Edge Difference

Bring your estimators and company together to work through these 5 Key Considerations with the experts at Estimating Edge. The best way is to reach out and visit with Mike Mouw and Joe Pettit or any of the highly experienced roofing sales representatives for The EDGE. Set up your free consultation to review these 5 Key Considerations today at marketing@estimatingedge.com.



Roofing Road Trip with Karen Edwards and Special Guest Joe Pettit and Mike Mouw: The Power of the Edge

Read the transcript:
estimatingedge.com/5key-podcasttranscript/

Listen to the podcast:
rooferscoffeeshop.com/podcast/s2e40-joe-pettit-and-mike-mouw-the-power-of-the-edge-2

About the Authors



Joe Pettit is a senior training support specialist at The Estimating Edge, where he has worked for the last 29 years and has trained over 1,000 estimators on The EDGE software. Prior to that, he worked in the construction industry as an estimator, project manager and superintendent for various general contractors.



Mike Mouw is a training & support manager at The Estimating Edge, where he has worked for the last 19 years and has trained close to a 1,000+ estimators on The EDGE software. He previously worked with a local general contracting company after changing careers as a Class A Golf Professional.