



A Tradies' Guide to Cloud Technology





In 2017 everything moves faster. Thanks to tablets and mobiles, texting and instant alerts, on demand content and streaming services, professionals and casual consumers alike expect more, and they expect it in real time. Email, instant messaging, instant payments and mobile business options let us communicate faster, work more efficiently and improve the bottom line.

But not everyone is champing at the bit to adopt the new technology. While accountants and IT professionals have embraced the seemingly endless possibilities offered by cloud technology, other industries, notably trades, have been slower to exploit the efficiencies, cost savings and sheer convenience the cloud has to offer.

Nevertheless, it's time — time to kiss that cumbersome filing system and those inefficient paper-based processes goodbye. These days cloud software is not just for the early-adopter — it's the mainstream.

It may seem like a daunting prospect at first, but there are plenty of reasons to make the leap. Once you adopt cloud tech you'll have access to your business in real-time from anywhere in the world (with an internet connection). With a cloud-based business you'll be more profitable — saving on upfront IT costs and avoiding expensive and maintenance-heavy hardware; you'll enjoy effortless updates, automatic backups, recovery and security; you'll engage with your clients more easily; plus you'll enjoy less hours on the clock and more time doing what you enjoy.

“Many tradies get into their profession for the lifestyle,” says Clinton Cowin, director at [TradiePad](#), “but as a business owner that freedom soon goes out the window. Cloud technology can help you get that lifestyle back, getting things like business administration done during business hours, rather than at 10 o'clock at night.”

Not only that but you'll be able to generate quotes, order supplies, schedule jobs, organise and follow up invoices — even manage payroll and inventory — all while you're out on the road or at the bach.

Simply put, you'll have access to enormous processing power and clever apps without having to have them built for you. You'll get the same software as the big players, without the expense, downtime and learning curve.

All it takes is a few good decisions.

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First things first

Many of our fears are tissue paper thin, and a single courageous step would carry us clear through them. ~ Brendan Francis

First, some good news. If you're using Gmail, Calendar, Drive or Docs, you're already in the cloud. Using Xero, MYOB or QuickBooks? You're using cloud solutions with those too.

The benefits of those services is obvious — your information is stored securely online and available from anywhere with an internet connection. That's the cloud at its best — efficient, convenient and economically worthwhile, integrating effortlessly with the other systems in your business.

But many tradies still feel a pang of hesitation.

"People want insight as to how it's all going to look and how it's going to work," says Cowin, "but it's not as hard as it seems. It's just about getting that initial understanding about what the tech can do, why you'd make the move and what the benefits are going to be."

"The most common concerns we hear are around cost; the belief that changing systems is going to be expensive, but that's just not the case," says Ashley Clemmett, general manager of Member Network Support, [Laser Plumbing & Electrical Australia](#). "That's something we've proven time and time again. In fact, it's quite the contrary — there are huge cost savings."

"Other than cost, there is often resistance around the changing of habits; changing something you've been doing for ten years. 'We need to phone our customers to collect outstanding accounts'; 'we need to put our invoices in the mail'. But when you're cloud-based you can automate a lot. You're using the system to do things that would otherwise be manual processes. Once you've got it set up, you'll save so much time."

"For example, I was on Facebook the other day and I saw one of our clients had posted a message from his houseboat up on the lake. 'Gosh,' he said. 'I love the cloud. Just paying the boys now.' He was organising the weekly pays for his technicians, checking in on his business and doing the payroll in the cloud. Five years ago that would have been impossible — on a houseboat in the middle of January! Particularly for the small or midsize business, it can really help you get your life back."

Get educated

Security

One of the most pernicious myths about the cloud is that it's insecure. In 2017 however, that is simply no longer the case and it's likely that any traditional PC-based solution available is less secure than the cloud. The fact is those in-house solutions require man-power to maintain. Without the vigilance trained staff the integrity and security of in-house servers becomes a liability. Systems can crash without warning and leave crucial data permanently corrupted; backups are all too easily forgotten and inconvenient; not to mention the security issues created every time data is transferred via the ubiquitous USB stick.



"Cloud software providers work under the strictest security guidelines, protected by 'James Bond' style measures, such as fingerprint and retina scans," says Guy Pearson of Practice Ignition.

"Multilayered anti-virus programs work to prevent any breach to the servers. Cutting edge data encryption software also makes it virtually impossible for data thieves to extract any useful information. So even small firms get the same security benefits as Fortune 500 companies."

"Concerns around security are still a big thing," says Clemmett. "Now we've had clients who have experienced fire, flood, theft, you name it. If they had have been storing their information on a server in-house, then the cost to retrieve all that data would have been very expensive — if it was possible at all. But having everything in the cloud means those businesses have been able to simply buy a new laptop and bang, they're back up and running overnight. That's because everything is backed-up in the cloud."

Cowin agrees.

"Security is still a question that comes up — 'Is my data going to get lost in the cloud?' But the fact is that these [cloud] companies are in the business of looking after people's data. It's easy to be scared of something you don't fully understand. Once you explain it and you provide that understanding they can make an educated decision. 'Yeah, it's not what I thought, but I use internet banking on a daily basis and I understand my data is not going to be compromised'."

Cloud providers ensure that your data is protected by the newest and most advanced technology available. Your information is stored on multiple servers ensuring no single crash will ever wipe out your business.

"I think we've now reached tipping point, with businesses coming in who have only ever known the cloud," says Margaret Carey, blogger and owner of Business EEz, "but now we don't think twice. A lot of businesses can be quite conservative — they're entrenched and they don't see the need to change — but you need to weigh up the level of functionality that you get at that entry level in Xero or Quickbooks Online or MYOB."

With cloud solutions you're free to forget about security, as well as the more general IT concerns you may be accustomed to dealing with, meaning you can focus on your business instead of focusing on your tools. All problems are taken care of by the developers of the software, instead of your company's IT guy (or gal).



Migrating to the cloud is not an 'all or nothing' proposition. In fact, you're probably already there to some degree. You're in the cloud. And with cloud tech you're at liberty to add products to your suite piece by piece, adopting new applications as your business grows.

"It's understandable that some people could feel overwhelmed at the idea of migrating to the cloud," says Clemmett. "People are so busy and tied down doing the daily tasks that a business requires that it can seem overwhelming to implement business improvements at the same time."

"Yes, you do need to set aside some time to do it, but you should, because the rewards will be enormous. And there are a lot of companies out there that exist to help businesses migrate into the cloud."

The learning curve is slight and there's little to fear in terms of disrupting your current systems for the worse. Best of all, after you're done, you'll have the ability to scale up and scale down your services at will; You'll be able to manage your own IT and enjoy pay-as-you-go terms for all your services.

"If you've got time and the desire then it's not that hard," says Cowin. "It's just a case of being committed — a month of pain for a very, very long term gain."



Benchmarking

With the effective use of benchmarking you'll be able to identify gaps in your processes in order to achieve greater efficiency and, it follows, a competitive advantage. You're probably already doing it to some degree — annual turnover, expenses, labour costs, etcetera. Using the cloud you can supercharge this process and gain greater insight into your business than you ever thought possible.

Clemmett concurs.

"Yeah, we're so lucky at Laser — we've got some fantastic cloud-based software that does benchmarking everyday, straight out of Xero. We're able to see how these franchisees were doing before they were with Laser and we can track how they're doing now."

"We can track across different market segments as well. Why is one making 20% more profit than another? Or why are their aged receivables so much better? We can really pinpoint what the problem is and work to get a solution in place. Instead of blindly trying to improve the whole business, you can identify the key areas and focus on those — because you can put a lot of energy into improving something that's already working really well. We look at a whole range of KPIs and identify that low hanging fruit and decide what to work on first. If we didn't have that data in the cloud we couldn't do it nearly as easily. We used to use raw data, spreadsheeting it ourselves, and it was such a big job we only did it quarterly. Now we do it daily and we don't need dedicated staff to make it happen. Now it's totally automated."

"A lot of times were exposing processes that people have never thought about before and making owners think about their business in ways they haven't thought about it before," says Cowin. "But that allows growth. They can scale, bring on staff, etcetera. No doubt change is required, but if you commit, you won't want to go back. No way."



The ecosystem

The power of cloud solutions is most dramatically demonstrated by the staggering number of low-cost apps available for businesses of every description.

“The great thing about cloud solutions is that there’s entry level software for everyone,” says Clemmett. “It’s not just for big business. If you’re a one man band, or have a few staff, or have thirty or sixty, you’ll be using the same systems — the same software. It doesn’t matter what size you are.”

“Everything bolts together — that’s what we love. It’s getting a system where everything works in harmony. Gone are the days of getting that colossal program that does everything. Instead it’s about getting a suite that does what you want.”

Some of the options available:

- Mobile payment solutions (with point-of-sale and data capture functionality)
- Customer relationship management software (CRM)
- Time tracking
- Payroll
- Job management
- Email managers
- Invoicing and credit control
- Inventory management
- Reporting

As your business changes, so too can your software. In addition to your core tools, cloud systems offer myriad low cost third-party add-ons. You pick and choose exactly what you want, when you want, and pay for nothing else. [See our recommendations below]



Cloud solutions liberate mobile devices. Devices which are otherwise limited in storage and memory take on a new level of usefulness when paired with cloud-based applications.

Essentially, every piece of paperwork you do in the field is one less piece of paperwork you'll have to manage after hours...and you'll be paid for it. That equals less time in the office, more time to work on your business (rather than in it), more billable hours and more time to spend with friends and family.

Just a few possible scenarios:

- On-the-job costing and appointment setting
- Video conferencing
- Editing documents, spreadsheets and quotes
- Emailing, updating contacts
- Booking appointments
- Sending appointment reminders
- Invoicing (checking who owes you what and how much) and invoice reminders

The irony is that with all the options available to tradespeople, uptake it still low.

"It's well known that the trades and services industry are one of the least tech adopted industries," says Cowin.

"That stands to reason. It's a big change going from pen and paper to paperless. Most tradies are very time poor — they spend their time 'on the tools', doing business administration after hours and that's a drag."

The future

Rarely does an opportunity come along that can save you money, free up your time and give you a competitive edge. Cloud computing does that.

But what's next?

"We've already seen that it's not about having one system that does everything. It's about finding a suite of cloud software that really suits your business," says Clemmett.

"Those different software products talk to each other. What I see in the future is that that level of integration is going to become greater and greater."

"I see that becoming more seamless to the point where there will be a cloud system you log into and everything will be bolted onto that. We're already seeing businesses from all walks of life realising it's not the future — it's happening right now."





Our cloud recommendations

Xero

Log in online anytime, anywhere on your Mac, PC, tablet or phone to get a real-time view of your accounting.

www.xero.com

MYOB

MYOB Essentials is easy online accounting software that has everything you need to take care of business, including payroll.

www.myob.com

QuickBooks

Quickbooks is a software solution designed to manage payroll, inventory, sales and other needs of a small business.

quickbooks.intuit.com

Debtor Daddy

Debtor Daddy politely and persistently reminds your customers to pay. Set-up takes just three minutes, then with just a few clicks, Debtor Daddy is on the job.

debtordaddy.com

Tradify

Schedule, quote & invoice jobs quickly and easily. Sync with Xero to track invoices, bills, customers and more.

www.tradifyhq.com

WorkflowMax

All-in-one workflow. for quotes, time sheets, job and project management, invoices and more.

www.workflowmax.com



Quotient

Intuitive online quoting and proposal software that lets you create, send and manage your quotes.

www.quotientapp.com

TSheets

Schedule and track employee time from your desktop or mobile device. Know who's working and where with GPS.

www.tsheets.com

Fergus

Job management software for tradespeople. Quotes, schedules, invoices, timesheets, GPS tracking and seamless integration.

fergusapp.com

SmartTrade

A comprehensive job management software system for trade & service businesses with a CRM module to build more information about your customers.

smarttrade.biz

iTrade

The Gold Standard for simple and clean job management without the clutter.

www.itrade.net

Accelo

Streamline your work into one integrated system with CRM, Projects, Service, and Retainers.

www.accelo.com

About Debtor Daddy

Debtor Daddy politely and persistently reminds your customers to pay.

Set-up takes just three minutes, then with just a few clicks, Debtor Daddy is on the job.

When an invoice is due, relax. Debtor Daddy follows up with perfectly crafted email reminders that get results, meaning you can get back to what you love.

[Try it free](#)

