

Field Service Assessment

Service Operations & Software Evaluation Report

CLIENT / COMPANY
Apex MEP Solutions, LLC

ASSESSMENT DATE
March 12, 2026

PREPARED BY
Summit Task

Sample assessment — Apex MEP Solutions (Electrical, Plumbing & Mechanical) · ServiceTitan → Salesforce Field Service migration

1 Business process review

A — LEADS & MARKETING

PROCESS MATURITY SCORE

1 Ad hoc	2 Basic	3 Defined	4 Managed	5 Optimized
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Primary lead sources	Monthly lead volume	Current marketing tools
Referrals & repeat clients	51-150	ServiceTitan Marketing Pro, Google Ads

Lead capture process (current state)	Target state / gaps identified
Inbound calls and web form submissions are manually entered into ServiceTitan by the office coordinator. Google Ads leads come through a third-party landing page and are emailed to the team — no automatic CRM entry. Referrals are tracked informally in a shared spreadsheet. No lead scoring or automated follow-up sequences exist. Marketing Pro sends seasonal campaigns but there is no visibility into which campaigns convert to booked jobs.	Automated lead capture from all sources directly into CRM with source attribution. Structured follow-up sequences for unbooked estimates. Lead scoring tied to project type (commercial vs. residential) and trade. Dashboard showing lead-to-booked conversion rate by channel. Integration with Google Ads for closed-loop ROI reporting.

B — SALES & ESTIMATES

PROCESS MATURITY SCORE

1 Ad hoc	2 Basic	3 Defined	4 Managed	5 Optimized
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Avg. estimate turnaround	Estimate / quoting tool	Close rate (est. %)
3-5 days	ServiceTitan Estimates + Excel (large jobs)	42%

Sales pipeline management (current)	Pain points & targets
Estimates are built in ServiceTitan for standard jobs. Complex multi-trade projects are quoted manually in Excel and emailed as PDFs. There is no unified pipeline view. Sales follow-up is handled ad hoc — no structured cadence or reminder system. The GM reviews open estimates weekly in a spreadsheet exported from ServiceTitan.	Significant revenue lost to stale estimates with no follow-up. Excel quoting creates version control issues and lacks approval workflows. Target: unified pipeline with stage tracking, automated follow-up tasks, CPQ-style guided quoting for multi-trade projects, and manager approval routing for jobs over \$25,000.

C — PRODUCT OFFERINGS

DAILY SERVICE CALLS		COMMERCIAL & INDUSTRIAL PROJECTS		RECURRING REVENUE / MAINTENANCE	
Trades covered	Electrical, Plumbing, Mechanical	Trades covered	All three (often multi-trade)	Active contracts	87 agreements
Typical job value	\$250 – \$4,500	Typical job value	\$18,000 – \$350,000+	Typical contract value	\$1,800 – \$12,000 / yr
Monthly volume	~310 jobs	Active projects	15–20 at any time	Visit frequency	Quarterly or semi-annual
Client mix	65% residential, 35% commercial	Booked via	GC referral, bid / RFP	Managed in	Excel tracker (not ServiceTitan)
% of revenue	~38%	% of revenue	~47%	% of revenue	~15%

Current state — offering management

The three offering types are not differentiated in ServiceTitan. This creates reporting blind spots: management cannot separate project margin from service margin, and recurring maintenance visits are not auto-generated. No centralized rate card or approval process for project-level discounting exists.

Target state & opportunities

Distinct record types in Salesforce Field Service for service calls, project work orders, and PM visits. Automated PM work order generation. Centralized price book across all three trades. Separate P&L reporting by offering type. Goal: grow maintenance agreements from 87 to 150+ within 18 months.

D — INVENTORY MANAGEMENT

PROCESS MATURITY SCORE

1 Ad hoc	2 Basic	3 Defined	4 Managed	5 Optimized
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Inventory tracked?

Yes — periodic

Warehouse / stocking locations

3 (main warehouse + 2 truck stock zones)

Current inventory system

ServiceTitan Inventory (partial use)

Current process notes

ServiceTitan Inventory is used for some electrical and plumbing materials but the mechanical division manages parts in a separate spreadsheet. Truck stock is reconciled manually each Friday. No automated reorder trigger exists — stockouts are caught reactively.

Target outcomes

Unified inventory across all three trades and stocking locations. Automated low-stock alerts. Barcode-scan receiving at warehouse. Truck stock reconciliation via mobile at job close. Serialized asset tracking tied to customer site records.

E — CASE MANAGEMENT

PROCESS MATURITY SCORE

1 Ad hoc	2 Basic	3 Defined	4 Managed	5 Optimized
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Case / ticket volume (monthly)

101-500

SLA tracking in place?

Yes — manual

Customer portal exists?

No

Current case handling process

Service requests arrive via phone, email, and web form. Priority is set manually — no defined SLA tiers. Callbacks and warranty claims are tracked in a separate shared inbox. Clients have no self-service visibility into job status or history.

Improvement targets

Structured case intake with trade-specific routing. Tiered SLA rules — commercial maintenance clients get 4-hour response; standard residential gets next-day. Automated SMS/email status updates. Customer-facing portal. Maintenance agreement automation with auto-generated PM work orders.

F — FIELD SERVICES, DISPATCH & PROJECT MANAGEMENT

PROCESS MATURITY SCORE

1 Ad hoc	2 Basic	3 Defined	4 Managed	5 Optimized
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Field technicians

34 (12 electrical, 11 plumbing, 11 mechanical)

Dispatch method

Drag-and-drop board (ServiceTitan)

Mobile app used in field?

Yes — ServiceTitan mobile

Scheduling & dispatch process (current)

Dispatchers assign jobs via the ServiceTitan scheduling board. Dispatch is managed by trade — each division has its own dispatcher. Multi-trade jobs require manual coordination via phone or text. No automated skill-matching or travel-time optimization exists.

Project management needs & gaps

15-20 active construction/renovation projects lack structured phase management. Milestone billing, subcontractor coordination, and permit tracking are all handled outside ServiceTitan. Target: distinct workflows for service calls vs. projects, Gantt-style phase scheduling, milestone billing triggers, and permit/inspection tracking.

GPS / location tracking

Yes — real time (ServiceTitan)

Avg. jobs per day per tech

4.2 service / 1 site (project techs)

G — INVOICING & ACCOUNTS PAYABLE

PROCESS MATURITY SCORE

1 Ad hoc	2 Basic	3 Defined	4 Managed	5 Optimized
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Invoicing trigger

Job completion (manual review)

Accounting platform

QuickBooks Online Advanced

Avg. days to invoice

4-7 days

AP / billing process (current)

Technicians close jobs in ServiceTitan and office staff reviews before pushing invoices to QuickBooks Online. Project jobs are invoiced manually in QuickBooks — no milestone billing integration exists. Invoices for large commercial clients average 28 days to collect.

Targets & pain points

Reduce days-to-invoice to same-day for service calls. Automate milestone billing for project jobs. Integrate payment collection into the customer portal. Automated AR aging reminders at 15, 30, and 45 days. Two-way sync between Salesforce and QuickBooks Online.

H — SECURITY

SSO / MFA enforced?

Yes — admins only

Role-based access control?

Yes — basic

Data residency requirements

US only

Compliance requirements

SOX 2

HIPAA

PCI DSS

ISO 27001

GDPR

Security concerns & notes

Field technicians use personal mobile devices in some cases — MDM policy is inconsistent. Credit card data collected via ServiceTitan Pay must remain PCI-compliant in any new environment. Role separation between trade divisions is important. SSO enforcement should be expanded to all users. Audit logging required for any changes to pricing, customer records, or permissions.

I — PAIN POINTS & MISSING SERVICES

Takeoff & estimating software

A formal evaluation of construction takeoff platforms is needed. Primary candidates are **Trimble Estimation** (strong MEP-specific trade assemblies) and **Autodesk Construction Cloud** (deeper BIM integration). The evaluation should assess: (1) accuracy for multi-trade MEP takeoffs; (2) native or connector-based integration with Salesforce Field Service for post-takeoff estimate-to-work-order conversion; and (3) ability to push material lists directly into inventory management. Neither platform has been assessed against the Salesforce integration requirement — this is a key open item before the Phase 1 discovery sprint.

Financing options for payment processing

Apex MEP has expressed interest in offering customer financing at the point of sale — particularly for HVAC replacement jobs exceeding \$5,000. Current ServiceTitan Pay does not support embedded financing. The target solution should support: (1) buy-now-pay-later (BNPL) or installment financing presented during estimate approval; (2) same-day funding to Apex MEP; and (3) PCI-compliant handling with no storage of card data on Apex MEP's systems. Candidate integrations include **Wisetack** (native Salesforce connector available) and GreenSky.

Call center integration & options

Apex MEP currently handles all inbound calls manually with no call logging, recording, or CRM screen-pop capability. A dedicated call center integration is needed to: (1) automatically create or match a Salesforce contact record when a known customer calls; (2) log call recordings and transcripts against the customer record; (3) support after-hours answering via AI-assisted IVR; and (4) provide queue management and SLA tracking. Recommended evaluation candidates: **Salesforce Service Cloud Voice** (native, Amazon Connect powered), **Twilio Flex** (highly configurable, Salesforce-native connector), and **Vonage Contact Center**.

Combined impact on platform selection

The three missing services have material implications for the Salesforce implementation. Takeoff integration may add 20-40 hours of scoping (Trimble vs. Autodesk connectors differ significantly). Financing integration via Wisetack adds approximately 8-12 hours to Phase 3. Call center integration is most variable: Salesforce Service Cloud Voice adds 15-25 hours; Twilio Flex adds 30-50 hours. These open items are reflected in Section 3 as a contingency range.

2 Software review & recommendations

CURRENT SOFTWARE STACK

Existing platforms in use

ServiceTitan (FSM, dispatch, invoicing, Marketing Pro, mobile) · QuickBooks Online Advanced (accounting, AP/AR) · Google Workspace · Google Ads · Procore (new construction only) · Microsoft Teams · ServiceTitan Pay (payment processing)

Contracts / renewal dates

ServiceTitan — annual, renews September 2026 (90-day notice required) · QuickBooks Online — month-to-month · Procore — expires June 2026 · Google Workspace — renews January 2027 · Microsoft 365 — renews March 2027

SOFTWARE FIT ANALYSIS

PLATFORM	CATEGORY	FIT — CURRENT	FIT — TARGET	RECOMMENDATION
ServiceTitan	Field Service / FSM	Medium	Low	Replace
ServiceTitan Marketing Pro	Marketing	Medium	Low	Replace
ServiceTitan Pay	Payment Processing	High	Low	Replace
QuickBooks Online Advanced	Accounting	High	High	Keep
Google Workspace	Productivity	High	High	Keep
Procore	Project Management	Medium	Medium	Evaluate
Salesforce Field Service	FSM / CRM / Projects	—	High	Implement
Salesforce Marketing Cloud Account Engagement	Marketing Automation	—	High	Implement
Stripe + Wisetack	Payments & Financing	—	High	Implement
Trimble Estimation	Takeoff & Estimating	None	High	Evaluate
Autodesk Construction Cloud	Takeoff & Estimating	None	High	Evaluate
Salesforce Service Cloud Voice	Call Center	None	High	Evaluate
Twilio Flex	Call Center	None	High	Evaluate

RECOMMENDED STACK SUMMARY

Recommended platforms & rationale

The core recommended stack remains Salesforce Field Service + Sales Cloud + Marketing Cloud Account Engagement, replacing ServiceTitan across all operational, sales, and marketing functions. Three new workstreams from Section 1i require additional platform decisions:

Takeoff & estimating: Discovery sprint comparing Trimble Estimation and Autodesk Construction Cloud in Phase 1. Decision required by end of Phase 1.

Financing: Wisetack is recommended — certified Salesforce AppExchange connector, same-day funding, purpose-built for home and commercial services. GreenSky is a secondary option for jobs >\$50K.

Call center: Salesforce Service Cloud Voice is recommended for Apex MEP's scale — natively embedded, eliminates middleware, supports Amazon Connect IVR for after-hours overflow. Twilio Flex is stronger if a dedicated dispatch center with 5+ agents is planned.

Integration requirements

Salesforce ↔ QuickBooks Online (DBSync or Breadwinner) · Salesforce ↔ Google Workspace + Google Ads · Salesforce ↔ Stripe + Wisetack · Salesforce ↔ Trimble or Autodesk (TBD) · Salesforce Service Cloud Voice or Twilio Flex (TBD) · ServiceTitan data migration: customers, 3-year job history, assets, 87 maintenance agreements

Estimated total annual license cost

\$78,000 – \$108,000 / year (expanded stack incl. call center, financing & takeoff platform)

3 Estimated implementation timeline

SELECTED IMPLEMENTATION PATH — PHASED ROLLOUT

- Lean stack
- Full stack
- Phased rollout
- Ongoing maintenance

Phased rollout selected — recommended given Apex MEP's 34-technician team, three-trade structure, active ServiceTitan contract through September 2026, and the need to minimize field disruption during peak spring/summer season. Three new workstreams (takeoff software, financing, call center) have been incorporated into Phase 1 discovery and Phase 3 respectively.

WEEKS BY PHASE

PHASE	SCOPE	WEEKS
Phase 1	Foundation, CRM, data migration, takeoff platform discovery	1-5
Phase 2	Field Service config, mobile deploy, dispatch, parallel run	6-11
Phase 3	Billing, QBO integration, case mgmt, financing, call center	10-15
Phase 4	Marketing automation, inventory, recurring revenue	14-18
Phase 5	Reporting, dashboards, cutover, hypercare, admin training	18-22
Total		22 weeks

Phase 1 — Foundation, CRM core & takeoff discovery

Weeks 1-5

Salesforce org provisioning, security model (trade-based role hierarchy, MFA enforcement). Sales Cloud: opportunity management, CPQ quoting, estimate approval workflows. ServiceTitan 3-year data migration. Google Workspace and Google Ads integrations. Takeoff platform evaluation sprint: Trimble vs. Autodesk — integration depth, MEP assembly review, Salesforce connector scoping. Decision required by end of Week 5.

Phase 2 — Field Service, dispatch & takeoff integration build

Weeks 6-11

SFS configuration: service territories by trade, skill-based scheduling, distinct work order types for service calls, project tasks, and PM visits. Mobile app deployment and training across all 34 techs. Dispatcher training and 2-week parallel run. ServiceTitan Pay decommissioned; Stripe activated for field payment collection. Takeoff platform integration build initiated.

Phase 3 — Billing, accounting, financing & call center

Weeks 10-15

QuickBooks Online integration via DBSync: two-way invoice sync, payment posting, product catalog alignment. Automated invoicing on job close; milestone billing for project jobs. Wisetack financing embedded into customer portal and field mobile. AR aging automation (15/30/45 day reminders). Call center platform configured (Service Cloud Voice or Twilio Flex) — CRM screen-pop, call logging, after-hours IVR, SLA tracking. Customer portal activated.

Phase 4 — Marketing automation, inventory & recurring revenue

Weeks 14-18

Marketing Cloud Account Engagement: lead nurture sequences, unbooked estimate follow-up, Google Ads attribution, maintenance agreement renewal campaigns (target: 87 → 150+ contracts). Inventory module: 3 locations, truck stock reconciliation via mobile app, serialized asset records. Procore replacement decision finalized.

Phase 5 — Reporting, optimization & ServiceTitan cutover

Weeks 18-22

Executive dashboards: revenue by offering type (service / project / recurring), technician utilization, first-time fix rate, aging AR, pipeline by stage, call center SLA performance, financing adoption rate. Full ServiceTitan cutover — contract not renewed (September 2026). 30-day hypercare. Internal Salesforce admin training and documentation handoff.

Estimated duration

20-22 weeks (April - September 2026)

ServiceTitan contract notice deadline is approximately June 2026 (90 days prior to September renewal). Phase 2 field go-live must be confirmed successful before this date to justify non-renewal. The takeoff platform decision (end of Phase 1) is the single highest-risk dependency for staying on schedule.

ONGOING MAINTENANCE — RECOMMENDED TIER

SERVICE TIER	SCOPE	CADENCE
Essential	Break-fix support, user provisioning, minor config changes	On-demand, <5 hrs/mo
Growth ★ Recommended	Ongoing improvements, workflow builds, reporting, Salesforce release mgmt, QBO sync, call center tuning, financing reporting, user training	Bi-weekly check-ins, 12-15 hrs/mo
Enterprise	Dedicated consultant, integrations, roadmap planning, full admin coverage, takeoff platform ongoing optimization	Weekly, 20+ hrs/mo

The Growth tier is recommended for Apex MEP's first 12 months post go-live, particularly given the expanded stack — call center tuning, Wisetack financing reporting, and the takeoff platform integration will require ongoing refinement in the first two Salesforce release cycles. After 12 months, a move to Essential is appropriate if an internal Salesforce admin is in place.

ASSUMPTIONS & DEPENDENCIES

Key assumptions

1. Apex MEP designates an internal project champion available 5-8 hrs/week during implementation. 2. ServiceTitan data export provided within 10 business days of kick-off. 3. Salesforce licenses procured by April 7, 2026. 4. QuickBooks Online chart of accounts reviewed and cleaned prior to integration build. 5. Technician device standards agreed upon before Phase 2 — minimum iOS 16 or Android 13 required. 6. Takeoff platform decision (Trimble vs. Autodesk) made by end of Phase 1 (Week 5). 7. Call center platform decision (Service Cloud Voice vs. Twilio Flex) made by start of Phase 3 (Week 10).

Risks & mitigations

Risk: Takeoff platform evaluation extends beyond Phase 1. Mitigation: evaluation sprint scoped as first 2 weeks of Phase 1; decision gate at Week 5 is non-negotiable. | Risk: Technician adoption resistance across 34 techs. Mitigation: trade-lead champions per division; training by trade. | Risk: Call center scope creep — Twilio Flex custom builds can expand significantly. Mitigation: scope cap agreed in Phase 3 contract amendment before build begins. | Risk: QuickBooks sync complexity. Mitigation: dedicated sprint with parallel validation. | Risk: ServiceTitan renewal deadline pressure. Mitigation: Phase 2 go-live at Week 11 provides 14 weeks of buffer.

✓ Consultant notes & sign-off

Overall readiness

3 / 5

Partially ready

Est. project length

20-22 wks

April – September 2026

Est. go-live

Sept 2026

Before ServiceTitan renewal

Executive summary

Apex MEP Solutions is a well-run, growth-oriented MEP firm that has outgrown ServiceTitan's capabilities across all three operating dimensions — field service management, commercial project delivery, and recurring maintenance. The addition of three previously unaddressed capability gaps (takeoff & estimating software, customer financing, and call center integration) materially strengthens the case for migrating to Salesforce as a unified platform.

The recurring revenue stream remains the highest-opportunity area — 87 maintenance agreements managed in a spreadsheet represent ~15% of revenue but likely 30%+ of margin. Getting these into Salesforce and on automated schedules is a quick win that will deliver outsized returns relative to the project investment.

Four open decisions must be made before or during Phase 1 to protect the September 2026 cutover deadline: (1) Salesforce license tier confirmation; (2) Trimble vs. Autodesk for takeoff; (3) Wisetack vs. GreenSky for financing; and (4) Service Cloud Voice vs. Twilio Flex for call center. Summit Task will facilitate all four decision frameworks during the kick-off sprint.

Overall readiness score

3 — Partially ready

Follow-up meeting date

March 19, 2026 — Apex MEP Leadership

Next steps owner

Summit Task + Derek Okonkwo (Apex GM)

Consultant signature

Summit Task

Client acknowledgment

Derek Okonkwo — Apex MEP Solutions, LLC