



A ServiceTitan Magazine

# TOOLBOX

Spring+Summer 2024

# THE SOLUTIONS ISSUE



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HELPS CONTRACTORS  
KEEP WINNING **PAGE 14**

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to make customers'  
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Get 14 pages  
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tips inside!



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Editor's Note

Welcome to the third issue of Toolbox, ServiceTitan's magazine for the trades. For those of you new to Toolbox, this magazine is the print counterpart to our digital home at ServiceTitan.com/Toolbox, which includes articles, webinars, podcasts, tools, licensing and much more.

Our team continues to be blown away by the response to our first two print issues. We love highlighting the amazing work done by contractors like you — and that continues in this issue!

Some of the highlights:

- In a tighter economy, how are companies like yours still growing and winning? We profile three companies who are getting it done by emphasizing the basics.
- As part of our 2024 Commercial Market Report, we check in with Dallin Tippetts and Rainforest Plumbing & Air on process optimization ... which goes hand-in-hand with revenue growth.
- And don't miss the review of features built into ServiceTitan — to make sure you're getting the most out of our software!

Finally, we want to hear from you! What do you want to see in future issues? Do you have a story worth sharing? Got an idea for a new digital tool? Let us know!

Email us at ToolboxMagazine@ServiceTitan.com.

We truly hope you enjoy this issue of Toolbox. And from all of us at ServiceTitan, thank you for all you do, each and every day!

Scott Goldman

Scott Goldman, Toolbox Editor



Events  
YOU DON'T WANT TO MISS



Registration Now Open

Clear your calendar and start planning your travel. The leading conference in the trades—Pantheon—is returning to Orlando.

Once again Pantheon is taking place at the Orlando World Center Marriott in Florida. The conference kicks off on Monday, Sept. 30, and closes on Wednesday, Oct. 2, after the final keynote address.

To join dozens of thought leaders, hundreds of ServiceTitan team members, and thousands of contractors like you for a two-day celebration of the trades grounded in learning, networking, inspiration, and motivation, scan here



Come See Us at These Upcoming Events

2024 Dates	Event	Location
8.14	APR Buying Show	Hershey, PA
8.21	APR Buying Show	Monroeville, PA
9.6	NADCA Fall Technical Conference	Durham, NC
9.9	Carrier Elite Dealer Meeting	Miami, FL
9.11	RCAT	Irving, TX
9.12	Gensco Mitsubishi	Tacoma, WA
9.17	1-Tom-Plumber National Convention	Cincinnati, OH
9.22	MSCA	Colorado Springs, CO
9.24	Nexstar Super Meeting	Orlando, FL
9.28	NECA	San Diego, CA

# BACK 2 BASICS

## New webinar series aims to sharpen ServiceTitan users' knowledge

By Brendan Meyer

**W**hether you're a new ServiceTitan user or someone who knows their way around this powerful platform, there's always more to learn. That's why ServiceTitan, which wants every user to know how to tap into the software's full functionality, started its new monthly webinar series titled Back 2 Basics.

"Back 2 Basics was created to provide our customers with another free resource aimed at refreshing your ServiceTitan knowledge and helping you gain a deeper understanding of the features that you already have access to," said Natalie Koch, ServiceTitan senior content marketing strategist.

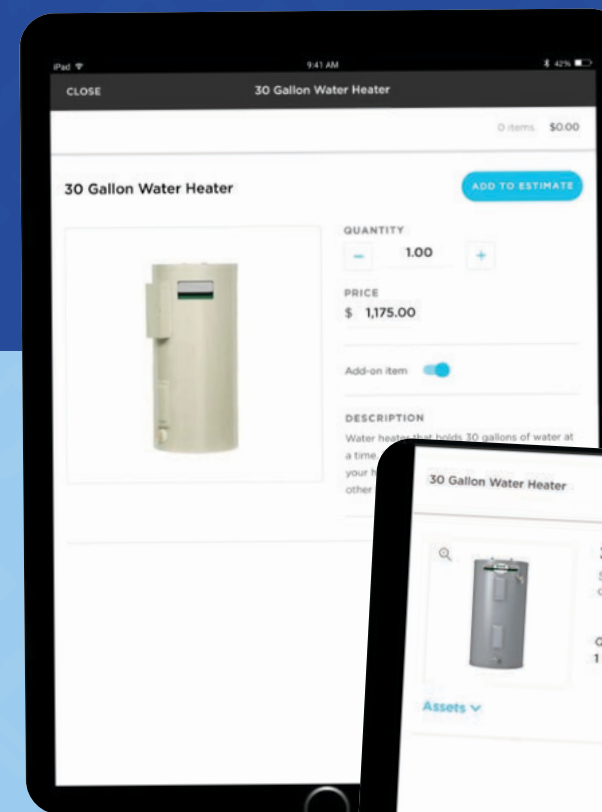
"We hope that, by introducing some of these really basic learnings each month led by our internal subject matter experts, we can enhance your knowledge of ServiceTitan in a different way and also provide you with some resources to continue on your journey to level up your daily usage and potentially answer some of your questions."

Here's a sneak peek into the best tips from each webinar.

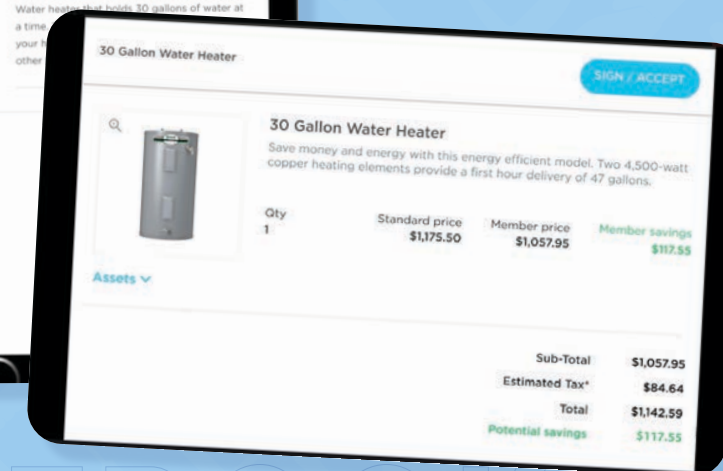


### LIVE AND ON-DEMAND WEBINARS FOR COMMERCIAL AND RESIDENTIAL CONTRACTORS

Don't miss out! Scan here or go to [www.servicetitan.com/webinar](http://www.servicetitan.com/webinar) and stay up to date with our live and on-demand webinars for commercial and residential contractors.



Scan to watch the Pricebook and Estimate Templates 101 On-demand Webinar



# PRICEBOOK 101

Building out your pricebook can seem like a daunting task. Where do you even start?

Here's one pro tip: Involve your technicians.

"Your technicians are using the pricebook every single day," Program Facilitator Tim Sjobeck said. "It's the most important tool in their bag. Why wouldn't I involve them in the build of this?"

A fully developed pricebook helps technicians communicate more clearly with customers, offer multiple options that convert more sales, and simply perform

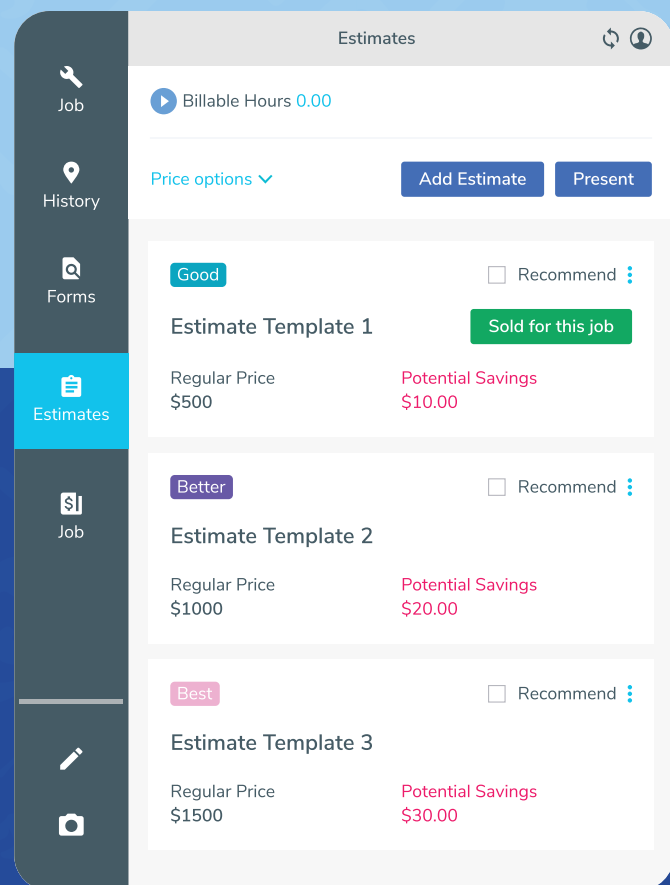
their jobs at a higher level.

Work with your techs to know what they want to see in a mobile view. Typically, they want to see their most-used categories at the top, so they don't waste time scrolling to find what they need when they're with the customer.

Here are some other tips:

- Know your flat rate and billable hours
- Keep it simple
- Constantly evolve your pricebook





# ESTIMATE TEMPLATES ESTIMATE TEMPLATES ESTIMATE TEMPLATES

Here's a stat for you: Shops that used ServiceTitan's estimate templates in 2021 grew revenue by 7.5%, and when those shops used the estimate templates at least 30% of the time, they grew by 10%.

How is that possible? For starters, estimate templates create technician efficiency.

"If you have these proposal templates built, they're not going out to their truck, spending 30 to 40 minutes or an hour building all these options, and then coming in and presenting to

the customer," Sjobeck said. "This creates some efficiency for them and a better customer experience."

Using estimate templates to offer customers multiple options also increases your revenue and conversion rates, and improves your customer experience.

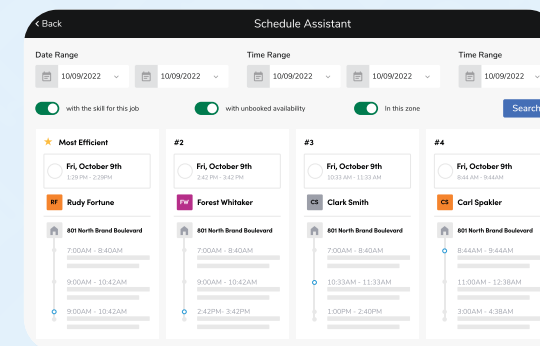
It's also important to note the difference between:

- Static and dynamic estimate templates
- Multiple-option proposal templates



**Scan to watch the  
Pricebook and  
Estimate Templates  
101 On-demand  
Webinar**

# CALL CENTER BASICS 101



As a call-center manager, one of the most important KPIs to track and monitor for your team includes call conversion rate and booking percentage.

To determine these numbers, you need to know your call-booking goals, your monthly revenue goals, and your total job average or average ticket.

"That helps you know how many jobs you need to have on the board to meet your monthly revenue goal," said Angie Snow, a ServiceTitan principal industry advisor and call center

expert. "And have that number up there so all your CSRs know exactly how many jobs should be booked, whether it's per month, per week, or per day."

Knowing your KPIs is one of the four simple things managers can do to perform more effectively and ensure CSRs are maximizing every opportunity.

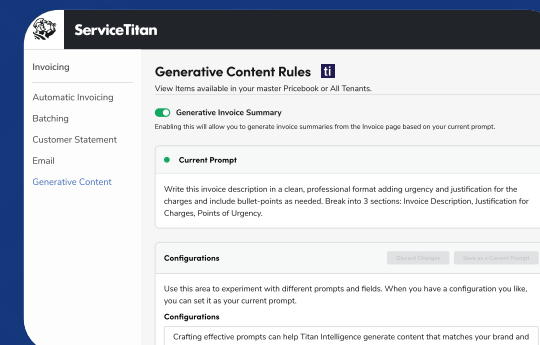
Other tips include:

- Set goals
- Provide training
- Measure, report, and improve



**Scan to watch the  
Call Experience  
That Performs  
On-demand  
Webinar**

# ACCOUNTING FEATURES REVISITED



Auto-batching is a new automated process you can find in ServiceTitan. So what is it?

A batch is a group of transactions, invoices or payments for exporting to an accounting software. Auto-batching allows you to automatically add transactions into batches based on specific rules and preferences, instead of doing it manually.

According to Program Facilitator Megan Montgomery, it's going to make your life a whole lot easier.

"Best practice is to really do this on a daily basis. Batching, posting, and exporting

should be a regular process for you," Montgomery said. "I would not go longer than a week between batching, posting, and exporting, because it just becomes a lot to go through."

Montgomery also talks about...

- Invoicing best practices inside the ServiceTitan Transaction Hub
- Tips on using payment terms and automated workflows
- Highlights new features coming soon, including journal entries and touchless integration



**Scan to watch the  
Accounting Features  
Revisited  
On-demand  
Webinar**



# THE TOP 14

## SERVICETITAN FEATURES YOU CAN USE TODAY

By Brendan Meyer



**C**ongratulations! You've already done the hard part.

- You've ditched your previous software or pen-and-paper and signed on with ServiceTitan, blazed your way through onboarding and gone live with the software that's built for the trades.
- Now there's only one question to ask. • Are you getting the most out of it?
- The standard ServiceTitan package comes with a plethora of features that are built to automate, simplify and take your business to the next level. So to make sure you're using the best ones, we've enlisted the help of Sena Sadeghi and Megan Montgomery.
- Sadeghi, ServiceTitan's Senior Manager of Customer Programs, and Montgomery, ServiceTitan's Ember and Sparks facilitator, have spent countless hours combing through the best ServiceTitan features and how they boost our customers' business.
- Here are their Top 14 features.



### WANT MORE INSIGHT INTO THESE FEATURES AND DIG EVEN DEEPER INTO THE SERVICETITAN COMMUNITY?

Get started with free training to get the most out of ServiceTitan with EmberSessions, led by a product expert.

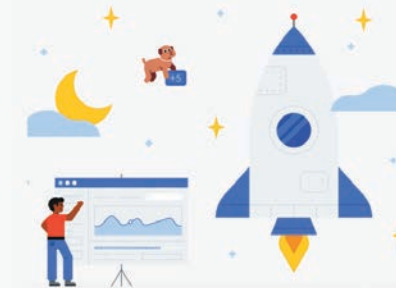
### Welcome to TitanAdvisor

THE NEXT GENERATION OF TITANSORE

Personalized recommendations to help you get the most out of ServiceTitan.

This will take about 2 minutes to complete

Let's Get Started



### TitanAdvisor (TAD)

**WHAT IS IT?** Are you competitive? Are you that person who can't be peeled away from Pop-A-Shot or Galaga arcade games until you've set the high score? TitanAdvisor tracks how much of the system you're using, how well you're utilizing it, and gives you a score. A higher TAD score correlates with some of our most successful ServiceTitan customers. In April, the highest score was 273. Make sure to keep your eyes on your TitanAdvisor score, which you can find by clicking on the rocketship icon at the top of your screen in ServiceTitan.

**THE QUOTE:** "TAD encompasses so many different facets of the software. It's business and software best practices. It highlights the KPIs that are important for you to be monitoring, shows why it's important, and (offers) a feature that can help you," Montgomery said. "And you can gamify it and measure how you're doing."

### Tags

**WHAT IS IT?** It's time to throw away those brightly colored Post-It notes that were meant to catch the attention of a tech or office member with a critical message. Because now you have Tags, which allow you to flag specific information at the job, customer and location level. But that's not all.

**THE QUOTE:** "One of the dopest things I'll say is Tags are searchable and tags are reportable. You can use it inside of marketing to filter down your audiences," Sadeghi said. "I think these are some of the most flexible things that help ServiceTitan users when we don't have a specific field or we don't have a specific function. Tags is usually that catchall at the very end. It's a super-useful tool."



**ARE YOU  
READY TO  
LEAD THE  
CHARGE AND  
TAKE YOUR  
BUSINESS  
TO THE NEXT  
LEVEL?**

The Titan Score Challenge is here to help you get the most out of ServiceTitan and achieve rapid growth! Learn details, including how to win exclusive rewards here







### Custom Fields

**WHAT IS IT?** Don't see a field that captures one of your business needs? Create one. There are multiple places within ServiceTitan to add a custom field. Those fields are searchable and reportable, and certain custom fields can be used inside Marketing Pro.

**THE QUOTE:** "If a customer has a specific workflow or piece of information they know they're going to need, and maybe it doesn't exist in ServiceTitan, this is their answer," Sadeghi said. "It allows them to stay flexible and really customize the software to their needs."

### SMS Recurring Services

**WHAT IS IT?** Imagine this: The latest and greatest ServiceTitan Toolbox Magazine has just been completed, and as it's mailed out to customers all across the country, you receive a text message that says: "Hey ServiceTitan reader! It's time for you to dig into another edition of ServiceTitan Toolbox Magazine!" Well, that's the point of SMS Recurring Services. This feature, available in the essentials package and above, allows you to send a text rather than an email for recurring services to generate revenue—especially if you follow this great tip from Montgomery.

**THE QUOTE:** "This feature is a double-edged sword (in a good way) because you get a huge influx of calls and requests once you start using it," Montgomery said. "I know customers who've started narrowing it down to locations. They'll set up a campaign tied to a location, which means all of the requests are coming from that specific zone. It makes it easier for scheduling and dispatching."



### Forms

**WHAT IS IT?** Favorite feature alert! This is Sadeghi's. Why? Because Forms allow companies to capture information that can be reported on and sent to the customer if necessary. Forms are great for historical information, or using as a CYA (cover your ...). For example, you can use Forms for technician PTO, truck checks, permit forms, and parts request forms—and they're all reportable. Forms are available in the starter package. But custom reporting on Forms and conditional logic—which Sadeghi loves—is only available in the works.

**THE QUOTE:** "We've added conditional logic into Forms so that the Forms don't have to be so massive," Sadeghi said. "You can have some logic built into it where, depending on your answer, it will show other specific fields in that Form. Just recently, we've added a reporting data set for Form submissions. Now, you no longer need to export the Form results and put them in Excel to see all that detailed information. You can actually see all of that stuff inside of ServiceTitan, which is a huge help."



### Feature Configurator

**WHAT IS IT?** We all love independence. And the Feature Configurator helps facilitate it. It allows ServiceTitan users to take control of their configurations and gives them the ability to turn on a feature without having to contact support or their CSM. With Feature Configurator, you can search to find out if you can enable certain things on your accounts and any limitations with the configurations.

**THE QUOTE:** "A lot of what we want to do is empower the customers so they don't have to call support or call their CSMs if they need something," Sadeghi said. "This feature empowers (our customers) to take control of some of those back-end settings that they can look at and they can implement."



### Alerts

**WHAT IS IT?** Need an easy way to be notified when a time-sensitive action has been completed? Just set up an alert. Alerts allow you to be notified by email or text right away. Did the customer just sign an online estimate? Boom, you just got an alert. Your technician requested an additional appointment? Ping, there's your alert. A form was just completed? You're getting an alert.

**THE QUOTE:** "Alerts allow you to stay agile," Sadeghi said. "It allows you to have things done in real time, or just be notified of things in real time for specific use cases."



### Transaction Hub

**WHAT IS IT?** It's the end of the month and time for accounting. Yay! (said sarcastically). But Transaction Hub makes end-of-month-closing easier. Why? You can quickly locate financial transactions such as invoices, customer payments, and bank deposits without having to go to each individual job, customer, or location record. It also allows you to click through invoices and assign them to a second person to review.

**THE QUOTE:** "I think Transaction Hub really encourages best practices," Montgomery said. "You can assign a secondary reviewer and get multiple sets of eyes to make sure all your invoices and payments are good. You can also use Transaction Hub to group your bank deposits and visually compare that to what your actual bank deposits are. It's mind-blowing."





### Task Management

**WHAT IS IT?** Have you repeatedly told your CSR to follow-up with a certain customer, and you want to make sure it actually gets done? That's where Task Management comes in. Task Management allows you to assign tasks to other office users within your company—and hold them accountable if they did not perform the action. Currently, this feature is for office use only.

**THE QUOTE:** "Task Management allows you to have an accountability structure in place. You're assigning tasks out, and as they're being completed, you're being notified, or if they're overdue, you're being notified," Sadeghi said. "Some really good (Task Management) examples are follow-ups, permits, happy calls, and refunds."



### Automated Refunds Workflow

**WHAT IS IT?** Montgomery wants you to stop inflicting pain upon yourself. She's seen far too many ServiceTitan customers who are set in their ways and haven't used the Automated Refunds Workflow feature, which helps streamline the process of refunding customers. This feature lets you issue refunds for payments that have been applied to an invoice, issue refunds for unapplied payments, and edit or delete a refund.

**THE QUOTE:** "I often get a lot of people that are set in their ways that haven't implemented this yet, and then when they see it, they're like, 'Is this real life?'" Montgomery said. "You just have to set up how you want your tasks to be assigned to general ledgers and things like that in your settings. Once you set that up, make your life a lot easier and let it take those steps for you. I like to save people from pain."



### Daily Huddle Report

**WHAT IS IT?** Data, data, data. Is there anything more important than data? It influences every great decision. And with the Daily Huddle Report feature, you can receive a summary of your main KPIs, which are broken down by current date, current week, previous week, current month, previous month, and year-to-date. Use this tool to hold daily/weekly huddles with the team and be able to show progress toward goals.

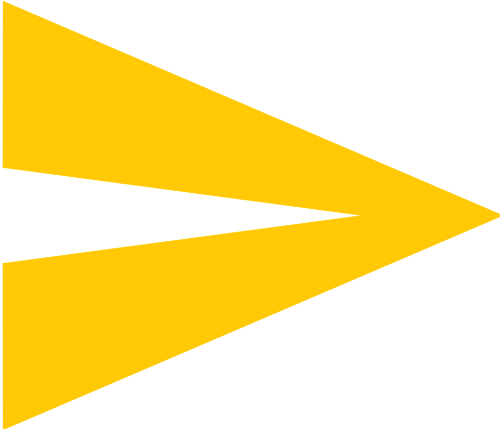
**THE QUOTE:** "Daily Huddle Report encompasses a larger scale of reporting capabilities," Montgomery said. "It's pretty cool because you can go into your business units and set a daily goal and be able to measure your business against the daily goal. I think it speaks to the power of reporting as a whole for ServiceTitan and being able to leverage your data."



### Pricebook Recommendations

**WHAT IS IT?** Everyone is looking to boost memberships and average tickets. That's why Pricebook Recommendations is great. It allows you to quickly add commonly used items, upsell for memberships, generate revenue and streamline tech processes, all while letting you recommend memberships on all applicable items.

**THE QUOTE:** "It's a really easy way to boost your membership count because you're recommending memberships naturally, so you're talking a lot more about them," Montgomery said. "And it's a nice way to boost average tickets."



### Automated Estimate Emails

**WHAT IS IT?** Who doesn't love automation, especially when it comes to sales? Automated Estimate Emails allow your system to have an automated follow-up for estimates to generate revenue. For example, you can use this feature to resend estimates to customers every two days to remind them to sign their estimate and move forward.

**THE QUOTE:** "It's cool to have this ability to automatically follow up on unsold estimates," Montgomery said. "It'll send the emails for a specified date range. A lot of shops have physical people following up on their follow-ups tab. But to have this piece of it in the background to be able to really get those sales is helpful." ■



### TitanExchange

**WHAT IS IT?** Remember in grade school when you used a stencil to draw a dinosaur or a house, and then decorated it to your liking after the fact? TitanExchange is your ServiceTitan stencil. It's where you can browse best-practice content shared by other network members such as forms, tags, payrolls, reports, dashboards, job types, business units, roles, and email templates, and pull templates into your account to use for your own business.

**THE QUOTE:** "I think this is a really great tool for newer folks who are just getting on the platform who don't have forms from another company that they've implemented or don't have dashboards that they want to look at and create," Sadeghi said. "This is a really easy way for them to get started very quickly and just grab these things from TitanExchange and then customize them to their needs."



# STILL WINNING

In a tighter economy,  
can growth be sustained?

These three companies make that  
happen by emphasizing the basics

By Pat McManamon



**T**he ripple effects from the COVID-19 pandemic continue to affect the trades. • ServiceTitan data shows that when people found themselves at home and/or working at home during shutdowns, they realized their systems needed upgrading. Replacement and other big-ticket items moved to the top of the to-do list. • “Seven years of demand put into a two-and-a-half year period,” said Bill Rosell, CEO of LB Capital, which owns several businesses in the trades. • That demand led to welcome growth, as companies from 2020 to 2022 enjoyed the revenue from installs and replacements. • By mid-2023, though, the trend had changed. Those who needed upgraded systems – hot water heaters, HVAC – had them, and work trended toward repair and maintenance. This challenged businesses that hoped to maintain the same growth rates they enjoyed in the “install” years. • The struggle is real, but there is no need for despair.



Some businesses have devised ways to buck the trend. They are maintaining healthy growth rates in this challenging economic time, and setting a strong foundation for continued growth in the future.

Three of these businesses discussed their approach with ServiceTitan, to explain what they are doing to maintain positive growth rates year-over-year. They offer sound tactics and strategies to maintain the scaling that is so important to a business.

While the average growth rate among ServiceTitan customers is about 7% annually, these three businesses have leveraged their strengths and principles to maintain at least 20% growth.



**Matt LaMartina**

One entity focused on ideas from a new management team. Another ensures the team is treated like family. And the third focuses on the processes that lead to success. Note: All may incorporate every one of these elements, but their individual focus on one of them is clear.

With their actions, they show it is possible to win in a time of economic challenges.

Cooper's Plumbing and Air is based in Bainbridge, Georgia, and has an office in Tallahassee, Florida. It saw revenue head the wrong way in 2022, from \$4 million to \$3 million. Hiring leaders from the corporate ecosystem brought in what Tony Cooper, Owner and General Manager, called "mature leadership people."

John Goodwin brought a corporate focus from Terminix. Daren Free brought the same from Charles Schwab.

"I feel like we had a lot of stuff in place because I'm bent toward admin rather than toward sales, even though I've done it all," said Cooper, who has been with the family business for 20 years. "Then I got these two other managers. One is a good sales manager, and the other guy has no inhibitions. He'll say, 'Why not buy another truck? We'll figure it out.'"

"With those two personalities plus mine, it created a good synergy of being able to grow quickly and not blow apart."

When Free interviewed, he said growth to \$40 million in 10 years was realistic. But from 2022 to '23, revenue jumped 81%. In the past year, the growth has gone from \$4 million to \$8 million with a goal for \$12 million in '24.

Cooper's became "an overnight success that took 20 years," Cooper said.

The right leadership helped in various ways, from a higher closing rate to a bigger average ticket to better hirings. Annual surveys measure employee engagement, and attention to that has seen the internal rating go from 60 to 91. That growth also benefited the team. Cooper's allows every employee to share in the success with a compensation plan built on revenue.

"All we see is success and more success, and we have no idea what's possible, so we just keep going," Cooper said.

Meanwhile, Yarbrough & Sons Heating, Cooling & Plumbing in Blanchard, Oklahoma, uses the honor system to facilitate growth. Meaning they honor their customers by honoring their



**"... No matter how big we get, it's about the team, it's about the family ..."**

**Tucker Yarbrough**  
Yarbrough & Sons

employees.

"If you do your job well, and you take care of people, people tend to call," said Chief Financial Officer Tucker Yarbrough.

This approach started with Yarbrough's parents, who made a point to take care of their employees from the day they founded this business in 2002. In the present day, that means putting 10% of profits in a profit-sharing fund, being transparent with the team about present financial status and long-term goals, and simply recognizing that, without the team, the business is nothing.

"Operating with a ton of humility," Yarbrough said. "The company doesn't exist without the team."

That approach has earned trust and respect from the team. The average tenure for a Yarbrough employee is seven years, the churn rate less than 15%.

"These people choose to spend their life making a career with us," Yarbrough said. "So we better operate with a ton of gratitude and humility."

The approach pays off in the bottom line. From 2018 through 2023, Yarbrough & Sons grew from \$4.5 million to \$10.1 million. Through it all, it maintained a profit margin of 12%-15%.

"One of the things that we're super conscientious of is, no matter how big we get, it's about the team, it's about the family and trying to be basically the largest small company that you'll ever have contact with," he said.

Finally, Tony LaMartina Plumbing in the St. Louis area finds growth by focusing like a laser on processes -- in marketing, the call center and ensuring the customer experience. This allows the business that was founded in 1982 to continue to build on the goodwill it has generated for 42 years.

"It also allows us to rise above some of the daily minutiae that we find ourselves churning in and helps us prioritize," said Matt LaMartina, the fourth generation of LaMartinas to work in plumbing and president of the company. "We ask, 'Is this an action, a behavior that's going to help us get to the next level? Or are we going to die on the hill of busy work?'"

Marketing means being prepared, for good and bad, and not pulling back if things become tough. Much work and energy has gone into ensuring the call center can answer questions and address needs, to make sure the first touch point for customers is a positive experience. Customer experience stems from the company's established brand awareness, but grows by helping those in the home understand what the customer needs, and wants.

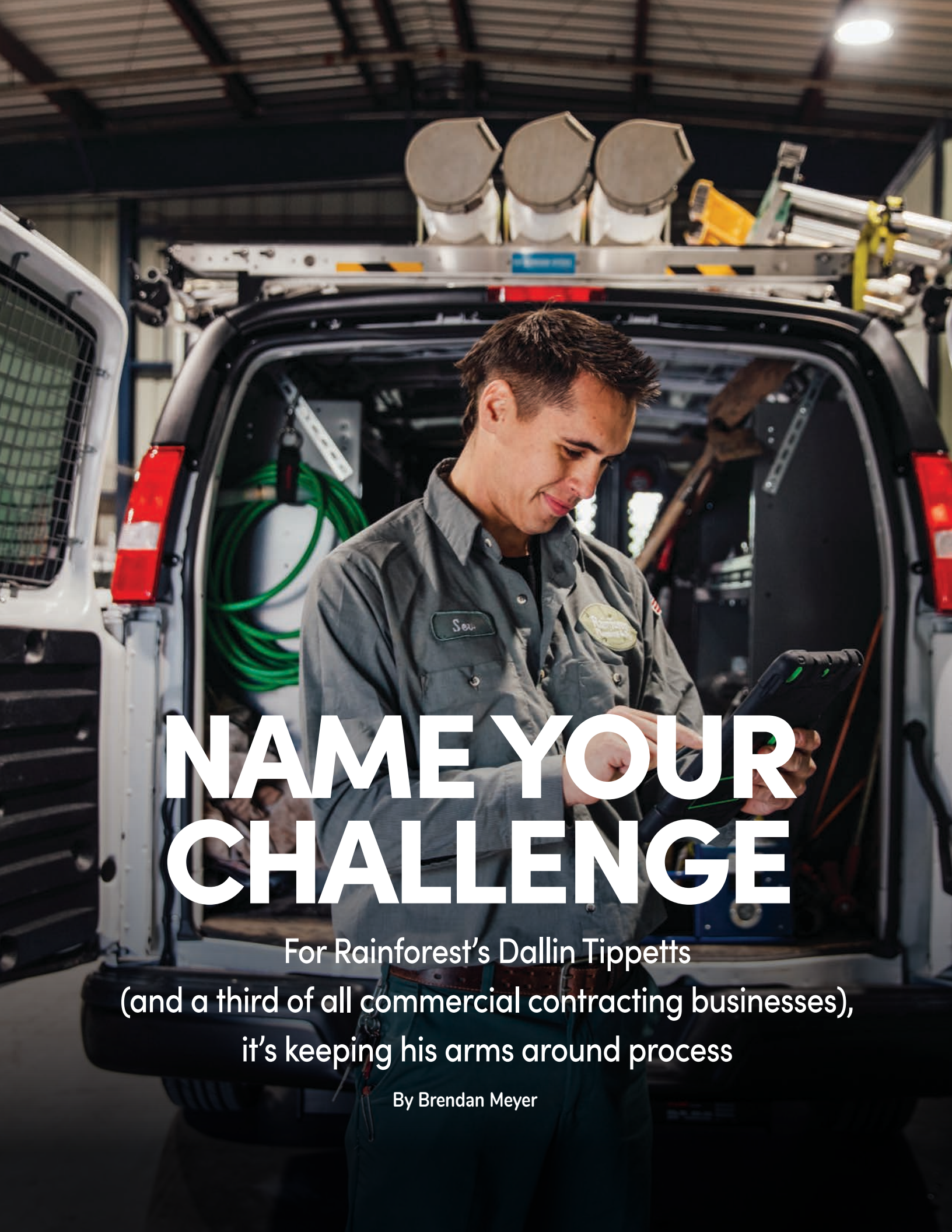
Growth has followed. LaMartina expected to do \$900,000 in business in the first quarter of 2024. It topped \$1 million before the quarter ended. LaMartina said the long-term goal is to be at \$10 million by 2028.

"We're definitely on that aggressive growth path," LaMartina said. "And I'm pretty excited. ... I mean, this is an awesome time to be in the trades." ■



**Tucker Yarbrough**





# NAME YOUR CHALLENGE

For Rainforest's Dallin Tippetts  
(and a third of all commercial contracting businesses),  
it's keeping his arms around process

By Brendan Meyer



**T**he moment Dallin Tippetts realized his family's business, Rainforest Plumbing & Air, had taken an exponential leap in size happened a year and a half ago. He walked into his shop's brand new office building in Mesa, Arizona, and was greeted by a co-worker.

"Hey, Dallin, how's it going?" the co-worker said. But Tippetts, the VP of Operations who has worked with his family (and brother Spencer) at the commercial-first shop for 12 years, didn't know who the person was.

"I looked at this person and I could not tell you their name," Tippetts said. "Never seen him in my life."

That day, Tippetts told himself that he needed to "keep my arms around this," he said. Because a growing headcount is exciting—but it also requires understanding everyone's role and how they affect Rainforest's most important person of all:

the customer.

That's why Rainforest is focused on process optimization in 2024. That's also one of the top goals for commercial contractors this year, according to ServiceTitan's 2024 Commercial Marketing Report—which surveyed more than 1,000 commercial contractors, not limited to ServiceTitan customers, across a variety of trades.

According to the report, key goals for 2024 include:

- Revenue growth (67%)
- Process optimization (33%)
- Improved profitability (32%)

For Tippetts and his brother Spencer, the VP of Air Conditioning Operations, those first two—revenue growth and process optimization—go hand-in-hand.

"We're not going to stop hiring, we're not going to stop



growing. But we have put a huge emphasis on making sure that everyone understands the values we have as a company,” Tippetts said. “How do you grow revenue? You grow it by optimizing your processes.”

Rainforest is familiar with growth. The company has never had a down year. The growth was incremental at first, but when they went live with ServiceTitan in 2018, it became exponential. In 2022, Rainforest ended the year with \$22.6 million in sales. In 2023, that number jumped to \$27.6 million.

According to the report, while only 29% of commercial contractors across the industry saw an increase in revenue last year, over 70% of ServiceTitan commercial customers saw an increase in 2023, with over 50% increasing revenue by 10%+.

**Grow, then maintain**

After seeing growth in sales and headcount (from 90 to around 115), Rainforest is now tasked with a new challenge in 2024: maintaining.

“It’s consistency in the quality of the people that we have,” Tippetts said. “It’s investing into the training of those individuals, and making sure that as we grow, we’re not losing the sort of bespoke quality of our service that we’ve had for so many years.

“We’re privately held. We haven’t been purchased by a corporation or conglomerate or something like that. We take a lot of pride in still being your local option. But it’s hard to keep your arms around that as the team continues to grow.”

Tippetts has already found one way to tackle that in 2024. In years past, directors and managers have looked at Rainforest’s sales goals as a whole. Not anymore. Now, Rainforest has individualized business-unit goals.

“We used some of the functionality in ServiceTitan where we can filter things down by business unit and just say, ‘Director and managers, here’s your stuff that you need to pay attention to. Don’t worry about the whole thing. Here’s your business unit numbers and let’s just tackle that,’” Tippetts said. “Now we operate on a week-to-week basis. Spencer and I check in with our individual directors and talk about that one business unit at a time.”

**More findings from the data**

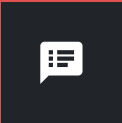
Tippetts anticipates those numbers will only continue to grow. He said Rainforest is upping its investment in sales and marketing in 2024—a common move among respondents.

According to the report, a significant 43% of businesses plan to increase their investment in sales and marketing activities in 2024.

It’s a big and exciting task for Tippetts, who relishes taking his family’s business to new heights. As for knowing everybody’s name by the day they’re hired?

He has his work cut out for him.

“We’ve been producing all these training videos (that I’m in),” Tippetts laughed. “So from Day 1, everybody knows what I look like, what my name is, and what I do.” ■



**“We’re not going to stop hiring, we’re not going to stop growing. But we have put a huge emphasis on making sure that everyone understands the values we have as a company.”**

**Dallin Tippetts**  
*Vice President Plumbing Operations and Client Services*



Scan to read  
ServiceTitan’s  
2024 Commercial  
Market Report

# GOING PAPER- LESS

How ServiceTitan helps  
Guardian Roofing deliver its  
'Customer for Life' motto

By Brendan Meyer

\$\$\$

To this day, there are two words that send a shudder through anyone at Guardian Roofing: "Packet Party." • It harkens back to a time when the Seattle-area residential roofing shop used to print roughly 300 pieces of paper a day from its printer, named Matilda, to document and manage that day's jobs. And they have far more daily jobs than your average roofing shop. • That's because Guardian, started by husband and wife duo Matt and Lori Swanson in 2005, has a "Customer for Life" motto. That means the company doesn't just replace your roof. It will also repair and maintain, with no job too big or small. • And that became a problem when it came to paper.



“A company that just does re-roofs, they might have 40 transactions in a month,” Matt said. “Sometimes we have 40 a day. That’s why the stacks of packets were so big. It created so much turmoil (and) inefficiency.”

A packet party wasn’t a party. It was panic.

Matilda was printing like a slot machine on jackpot, and office staff had to rush to file all of the pages into coherent packets, then place them in a filing cabinet for the technicians to eventually pull.

But wait! That was only some of the paper. There were also paper job-complete forms, paper service and repair agreements, and the stacks of packets that techs would bring every day that needed to be combed through.

“Inside those packets could be (notes like), ‘Call this customer, they want something different,’” Matt said.

“We found a few checks and some cash in these packets,” Lori said. “And also (crushed potato) chips.”

Too much paper caused a lot of stress and dysfunction at Guardian and, most troublesome, made it difficult to keep up with the “Customer for Life” motto. Yet, when they first heard about ServiceTitan and how it could simplify their business, Lori had one reaction.

“I was like, ‘No way. I don’t want to change,’” she said.

### Humble beginnings

Lori is a second-generation roofer who’s been in the industry most of her life. She spent high school and college summers working at her dad’s new-construction, commercial and residential roofing shop.

“I was in stinky trucks with stinky guys that smelled like asphalt and BO,” Lori laughed. “It was hard when all your friends are out at the beach and I’m up on a roof in 100 degrees, sweating. But it does build character, and you really learn the power of work ethic.”

She and Matt, who comes from a construction background, started Guardian with humble beginnings.

“I think our first job that we did, we traded for a website and a logo and did a roof for free,” Lori said.

Another time early on, when Matt and Lori were living in a small rented house, they sat together during a heavy rainstorm and discussed how concerned they were about the lack of work and leads.

“And literally right at that second, the roof in the place that we rented started leaking on my desk,” Matt said. “And we called the landlord and we were like, ‘Hey, you need a roof repair.’ And he’s like, ‘OK.’

“Whenever times have gotten really tough, it just seems like something has presented itself.”

Over time, Guardian grew and built a strong reputation in Seattle. But managing all of that growth, especially in the technological age, was proving to be unmanageable with paper.

It led to frequent miscommunication between the field and the office. Techs didn’t have the full client history at their disposal. Office staff spent hours deciphering handwritten field



notes and manually entering them into computers. There was a frequent disconnect between the field and the accounting team.

Maybe a software like ServiceTitan could be one of those Guardian moments when something just presented itself.

After Matt and Lori saw the software in action at a plumbing shop, they imagined how it could be a potential game-changer for their roofing business.

“We didn’t want to stay where we were at. We wanted to grow,” Lori said. “And so in order to grow and scale, we needed efficiencies and information to help facilitate that.

“It was a must-have.”

### Technological shift in roofing

Guardian went live with ServiceTitan in 2017—well before any of their roofing competition did. At the time, going the software route seemed like something that only HVAC and plumbing shops were doing.

And it was scary.

“All of a sudden, we don’t have paper anymore,” Matt said. “But I think you don’t realize how much it’s going to help you if you just fight through a solid month or two (of change).”

Today, Guardian is one of the largest residential roofing shops in the country with a 2023 revenue just shy of \$30 million. It has tripled in size since 2015.

“There is no way that we could have done that (without ServiceTitan),” Matt said. “I can’t imagine how many packets that would be.”

But now, after jumping ahead with technology seven years ago, the Swansons are seeing a big shift in roofing.

“If you look at how the industry has changed, everything revolves around technology,” Matt said. “Take marketing (for example). The fact that you’re getting reviews back every day, the fact that you better be monitoring every customer and how they feel about you. We have systems that do that, that send us text

messages if someone is unhappy. That’s what we’re doing just to keep up, just to try to stay ahead of the competition.

“Without all those things, I don’t see us being here. And I think it’s going to get really hard for companies that don’t embrace (technology).”

Lori agrees.

“I can’t even imagine going back to pre-ServiceTitan because of how archaic it was and not having real-time information,” she said. “Having to wait until the end of the month to know your metrics is just not scalable. It’s really hard to grow that way. You find yourself really reactive.”

As for Matilda the printer—the most archaic symbol of them all—her current whereabouts are unknown. Rumor has it she was retired in the same style that the printer in the movie “Office Space” went out.

“She got a gold watch,” Matt said with a laugh. “And out the front door she went.” ■





**"If (customers) book an appointment online, Dispatch Pro picks that appointment up, puts it on the board for us and nobody ever touches it."**

**Derik Wolfe**  
Call Dad's head of operations

# FROM **BOOKING** TO **DISPATCH**

Call Dad makes it easier on customers

By Adrienne Teeley • Photos by Bob Leverone

**A** few weeks ago, a potential customer phoned Call Dad, a residential HVAC company serving the Carolinas. But all of the customer sales representatives (CSR) were busy. • The caller was placed on hold via an automated voice message. But instead of waiting to speak to someone, the caller hung up. • Were they calling another HVAC company? Call Dad's team didn't waste time wondering. They quickly called the potential customer back, and asked why they had hung up.





Photos by  
Bob Leverone



“(The recording said) we could book online,” the caller said, referring to the automated voice message. “So we were just booking online.”

That’s why Scheduling Pro is one of Call Dad’s favorite ServiceTitan features.

“People just go online, book the call, it goes on the schedule. You never even have to do anything,” said Derik Wolfe, Call Dad’s head of operations.

“I think (this is) the future. What I’ve seen in the last five to 10 years, people are getting more and more introverted and don’t want to have open conversations. (They’re) looking for ease of booking.”

### Do more—without lifting a finger

When Wolfe first started his career, the only technology he had access to in his truck were paper maps and a huge yellow

Nextel.

“It literally took me 30 minutes to figure out where I was going after I finished one call,” Wolfe chuckled.

It’s no wonder he has been quick to embrace new technology. When Call Dad was updating its website last fall, it was important to him that the company lean into advancements such as online booking through Scheduling Pro.

In addition to Scheduling Pro, Call Dad also uses ServiceTitan’s Live Chat services, where industry-trained representatives are available 24/7 to answer customer calls and help schedule appointments.

It ensures every customer is fully taken care of—even if Call Dad hasn’t actually spoken to them yet.

“They get all the information they need, even what the (tech) looks like,” Wolfe said. “Then when we show up, they have their first conversation with Call Dad.”

### Dispatching made easy—really easy

As seamless as the online booking is for customers, it’s even more efficient for Call Dad’s team.

When a customer books online, the appointment is automatically put on the dispatch board and assigned to a tech, through another ServiceTitan feature, Dispatch Pro, which uses machine learning to assign the right tech to every job.

“Dispatch Pro with Scheduling Pro has been really great for us,” Wolfe said. “If (customers) book an appointment online, Dispatch Pro picks that appointment up, puts it on the board for us and nobody ever touches it.”

When setting up Dispatch Pro, Wolfe said there was a lot of room to customize how the software assigned techs, “and then it follows those rules that you set,” he explained. Now, he knows the right tech is going to every job, “compared to before, (when) you hoped your dispatcher was doing what they were supposed to.”

### Get used to busy “slow seasons”

When Call Dad started using Dispatch Pro, it had three dispatchers overseeing 30 trucks. But by the time winter rolled around, the company dropped down to one dispatcher.

The team is planning on bringing on more dispatchers, but wanted to get through the winter season first.

“Even with it being a slower time, we grew 81% from last (January), and still only had one dispatcher,” Wolfe said.

Wolfe is optimistic Call Dad will continue to grow in the coming months. The company is on track to grow revenue by 120% in 2024, and is looking to acquire other HVAC companies in the Carolinas.

These are lofty goals, and it’s hard to believe that something as simple as, say, online booking could aid in the business’s success. But “if 30% of our (bookings) start coming in that way,” Wolfe explained, “that takes pressure off of our CSR team, and lets them do outbound (sales) more.”

So taking advantage of these efficiencies is vital for Wolfe.

“Features like (Dispatch Pro and Scheduling Pro) help us become a better business, better company and do what we ultimately want to do: Serve like family and be there for our customers.” ■



# FINDING THE **QUALITY** IN THE **QUANTITY**

How Proximo Marketing pushes  
Marketing Pro Ads Optimizer to boost revenue

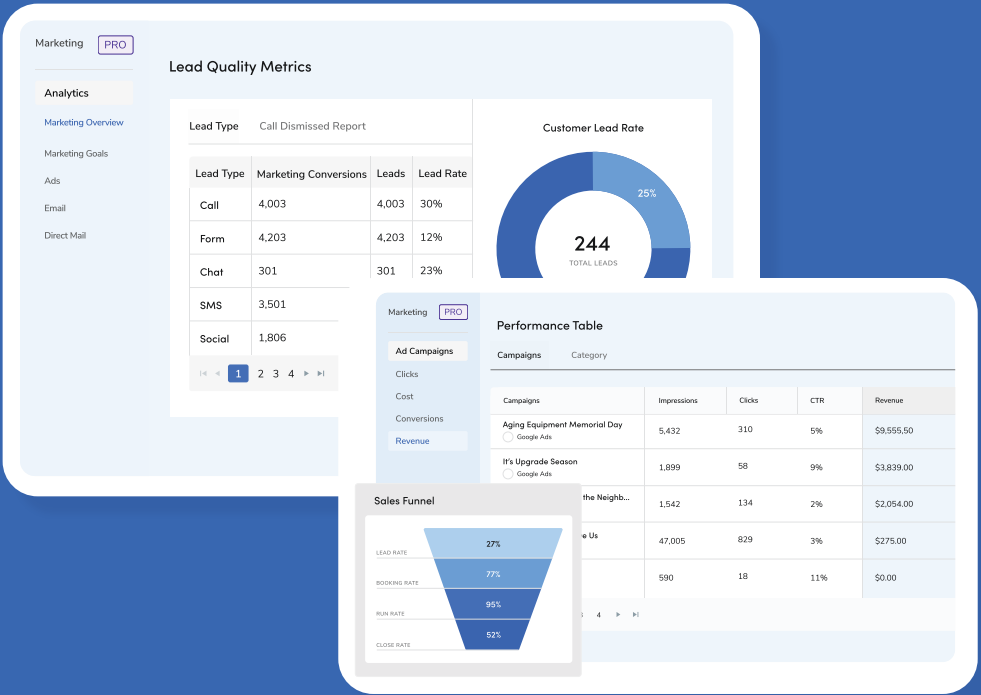
By Pat McManamon

**P**roximo Marketing makes one of its truths painfully clear on the company website. • “This is not,” the company says, “your Grandma’s marketing agency.” • That is meant literally and figuratively of course. • Because this team of women based in Gloucester, Va., (across the river from Yorktown) maximizes the digital world, where more and more businesses reside. • So when Senior Account Manager Liz Soto discusses the importance of the right advertising, she gets right to the point: “Why optimize toward calls when you can optimize toward revenue?”



“Now instead of optimizing toward potential calls, we're actually optimizing toward what you want, which is revenue.”

**Liz Soto**  
Senior Account Manager  
Proximo Marketing



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To affect that strategy, Proximo turns to Ads Optimizer in ServiceTitan. Ads Optimizer, which works within Marketing Pro, uses real data to make changes to an existing campaign strategy in Google Ads to increase lead quality.

“Lead generation is so important in the industry, and customer demand often drives a lot of the success of these businesses,” Soto said. “You have to be present, and you have to be able to feed that information back and forth to follow between seasonality and customer trends.”

“ServiceTitan's Ads Optimizer allows you to be able to continually stay on top of that because it just flows with the data that's being fed in and out. So I think that's what makes this such a profound way of using digital marketing.

“This is a solution that I think any industry would be able to capitalize on and really dig into. And I personally haven't seen any other software that is trying to do this.”

**‘Next level’ control of your marketing**

Once enabled, Ads Optimizer automatically analyzes data on campaign revenue from Google and revenue conversion data from ServiceTitan, which allows visibility into which campaigns are driving revenue and which ones are wasting money. Digital ads that work scale up automatically to generate more quality leads with higher average value, and Ads Optimizer minimizes spending on campaigns that don't convert to sales and revenue.

“The most important aspect of digital marketing, especially the component ServiceTitan offers, is being able to link that di-

rectly to job details and all the way through to the revenue,” Soto said. “That's really important, to be able to link those two together and then follow customer trends.”

In that way, Ads Optimizer solves one of the biggest pain points in marketing—tying digital marketing performance to revenue without having to create internal solutions. Instead, that work is done automatically within ServiceTitan and Marketing Pro, Soto said.

Ads Optimizer is driven by Titan Intelligence, ServiceTitan's artificial intelligence for the trades. The AI factor means the software learns as it functions, and can act without a human touch.

Ads Optimizer teaches Google what your ideal customer looks like. With this insight, Google will show your ads to searchers who are more likely to turn into high-paying customers, and stop wasting your ad dollars on low-quality searchers.

One campaign Proximo Marketing ran for a plumbing company, Soto said, saw lead quality increase from 44% to 60%, yielding almost a 100% better return on investment, after a month with Ads Optimizer.

Soto called that kind of capability “next level.”

**Proximo finds ‘invaluable’ precision**

Proximo's original work was in Dental Marketing, but the business grew to include the trades through word of mouth. Its emphasis on treating every business as a person helps it relate to what contractors experience.

“We find that anybody in the trades genuinely appreciates that you understand the job that they have to do and how they're serving people,” said MaKenna Wood, Proximo's Chief Marketing Officer.

The variables in the trades make precision marketing vital. Proximo said it finds that precision in Ads Optimizer.

As an example, she said that in demonstrating Ads Optimizer's potential to a client, Proximo could account for conversions from the ad to the call to the job completed, and the revenue associated with the job.

“That information by itself, to be able to share back and forth, is invaluable,” Soto said.

She continued.

“What I love about Ads Optimizer is the fact that any jobs that have been booked and any revenue that has been booked were considered qualified leads can then be filtered back into the Google Ads platform,” Soto said. “You can optimize toward that very specific type of transaction or (people like that customer).”

“So now you're getting a more qualified pool of data to then be able to funnel through. Now Google has the opportunity to optimize toward that very qualified pool compared to the general pool of calls.

“Maybe it's a lead, maybe it's not a lead, but you don't have that insight unless you actually are able to feed data back from ServiceTitan specific to the jobs and the revenue data.

“Now instead of optimizing toward potential calls, we're ac-

tually optimizing toward what you want, which is revenue.”

**‘You stand to make more money’**

As the Optimizer learns, more options and more information lead to more opportunities, and more optimization.

“I just like that it allows for room for growth and for error as you're growing as a company,” Soto said. “As I'm talking it out, you would think, ‘Oh yeah, I don't want to spend on this until I'm more established.’”

“Well, actually, if you spend on it earlier you can get that accurate data and start to optimize toward revenue. You stand to make more money on the investment, regardless of the level that you're able to invest.

“So it's a safer, more secure way of doing it, rather than throwing something against the wall and seeing what sticks.”

Wood said Ads Optimizer allows Proximo to act uniquely and serve clients on both sides of the agency's mission. To Soto, that means automating the execution side of campaigns, which allows Proximo to be more strategic.

“Our mission and our core values are to be results driven,” Wood said. “So we're using the data and the analytics and the information that we get from our marketing platforms in order to feed better decision making and support their business.

“It allows us to be in a better relationship with clients, which is another part of our core values and our mission as a company. Because we are using the tools that are needed to prove those results and get that data.” ■





# FAMILY TRADITION MEETS MODERN TECHNOLOGY

Tioga Plumbing & Electric's  
ServiceTitan story

Story by Brendan Meyer  
Photos by Nathan Hunsinger

**P**lumbing runs in Amanda Reeves' family. • Her grandfather was a plumber. So are her father, uncle and brothers. Her nephew just passed his tradesman test, which means the family trade is about to stretch four generations. • But growing up, Reeves had no interest in plumbing. She wanted to be a doctor. • "And my dad was like, 'You should be a vascular surgeon—because it's basically plumbing with smaller pipes,'" Reeves said. • Instead, she worked as a certified medical assistant. But then her father's new-construction, commercial and residential shop, Tioga Plumbing & Electric, started growing and needed help. She'd come in after hours and help with accounts payable data entry. Eventually, she left the medical field and joined the family business.





Today, Reeves is the office manager and going on 14 years at the Dallas-Fort Worth area company. That means she's seen plenty of change—much of it having to do with software. Tioga has shuffled through multiple types that didn't seem to fit—until they found ServiceTitan in 2016.

The all-in-one software for the trades worked well, but Tioga was only using it to schedule and invoice service calls.

Thanks to Reeves, that's now a different story.

In 2020, during the early days of the pandemic, Tioga's new-construction and commercial work with restaurants took a hiatus.

"(That meant) I had a bunch of extra time not having to do all the billing and stuff with that," Reeves said. "So I was able to dive into (ServiceTitan) and really learn how all of it works."

### Increasing productivity

Reeves has always tried to make things more efficient for her father's business.

"I remember as a kid, I used to sit in my dad's office with him and he'd hand me different color highlighters and say, 'Everything that's shaped like this, color this color, and then count them up.' I had no idea at the time, but I was helping him do takeoffs," Reeves said.

Many years later, when she suggested the company switch to software, Reeves' father supported the idea.

"Y'all just do whatever you need to do to make everything run smoothly," he told his daughter.

They shifted from one software to the next. The not-so-great ones had little scheduling capabilities. Others worked OK until Tioga started to grow (currently, they have around 40 employees).

The company learned about ServiceTitan through Reeves' brother, whose plumbing shop in San Antonio used it. Reeves researched the software with her sister-in-law, Courtney Car-

ter, and decided to make the switch in 2016.

But Tioga didn't realize the full benefits of ServiceTitan until Reeves had time to dig into it during the lulls of the pandemic. She spent hours going through every setting, chatted with support whenever she had a question, and set up weekly meetings with her customer success manager.

She dove into new features like reporting, dispatch, invoicing and customer communication, and Tioga's TitanScore jumped up about 50 points.

"I was like, 'Oh, it does this. Oh, it does that,'" Reeves said. "(For example), we turned on the dispatch notifications and the confirmation text messages, and our customers were like, 'Wow, the communication is fantastic!'"

"(ServiceTitan) increased our productivity and customer satisfaction exponentially when we started turning (on features)."

### A smoother workflow

These days, things have picked up at Tioga, enough that Reeves can't dedicate most of her time to learning more about ServiceTitan.

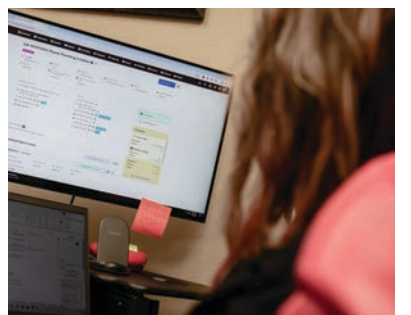
But she's still the go-to ServiceTitan guru in the office, and with that comes a sense of pride—and responsibility.

"I want to make sure we've got the proper processes and procedures to hand to everybody (about) what ServiceTitan does," Reeves said.

Recently, she just completed the ServiceTitan Certified Administrator Program. She also joined the Torch Network, and wants to keep better track of the Ember and Spark sessions, which fuel TitanScores and business development. Currently, she's setting up the inventory and project modules.

All of this is in an effort to set up Tioga for growth.

Or, put another way, she's removing obstructions and creating a smoother workflow. Which, coming from a long line of plumbers, fits perfectly with the family trade. ■



**"We turned on the dispatch notifications and the confirmation text messages, and our customers were like, 'Wow, the communication is fantastic!'"**

**Amanda Reeves**

Office Manager,  
Tioga Plumbing & Electric





**Lydia Brewster, Warehouse and Marketing Manager at Aqua Clear in Lenoir City, TN.,** won a 2024 Tesla Model 3 from ServiceTitan for being the top referrer of the software in 2023-24, recommending seven companies who became new users in nine months.



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**Jason Brady, Above & Beyond:** This year, Above and Beyond is pacing at \$10 million in revenue to go along with a TitanScore of 242—which is in the top 1% of all users. That's because founder Jason Brady utilizes many of ServiceTitan's products and features at his disposal—including Marketing Pro, Scheduling Pro, Dispatch Pro and Integrated Financing—that create strong processes at his company and provide a seamless customer experience.



**Adam Cronenberg, Element Mist:** Adam Cronenberg had so much previous success with ServiceTitan that he used the software when he started his Arizona misting company, Element Mist. In its first year, the company pulled in \$600,000 in revenue, with a 10% net income. "We had one customer tell us, 'I can see why you guys are the industry leaders, everything's great. You obviously have been doing this for a really long time,'" Cronenberg said. "(We were) like, 'Wow, we just started.'"



## Be brave on mental health, starting now

**W**hen Jackie Sorensen agreed to be a guest on "Toolbox for the Trades," ServiceTitan's podcast, she didn't plan on getting a counseling session, but I gave her one anyway.

She talked about the conflict between her and her father as she prepared to take over the family business, calling it a dark time, and how it made her feel lonely.

The counselor in me, seeded by a program when I was a college undergrad and deepened by more than 400 hours of counseling sessions I led as I pursued my Master's during the pandemic, kicked in.

In life, it's normal to focus on the negative, and to look for things that threaten our survival. That's where Jackie Sorensen had been. So I offered her a reframe, telling her that in my view she had been brave during that transition, which can be tricky in so many family businesses.

She thanked me, but all I had done was tell the truth. Her courage was inspiring.

So, as a leader in the trades or a manager within your company, how can you handle mental wellness for yourself and your employees?

Here's my advice:

If you are practicing good mental health strategies in your own life, that will bleed into your organization and will make the subject less taboo.

Be as open as you can about your struggles and your shortcomings, to make it more acceptable for folks who report to you to speak up when they're having a tough time.

Remember that work and home are intertwined. Normalize mental health struggles, because everyone deals with them.

Work at your own mental health, because when you do that, you're a model for the people who report to you and look up to you.

But above all else, give yourself grace. None of this is easy.

You may want to consider a coach or counselor of your own; most of my guests on the podcast speak about working with an objective third party to help them run their personal lives and their business. In the trades, many best practices touch on mental health in leadership, so resources are available, including setting expectations, having boundaries at work, and teaching people how to treat you.

I understand that it's hard to set aside energy to work on your own mental health, but I promise by doing so, you'll improve your life and the lives of those around you, including your team members.

If you do, that effort will be really brave. And I'd be the first to tell you as much.



Scan the code to check out the Toolbox for the Trades podcast.







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