2024 STATE OF THE
TECHNOLOGY
MARKET

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EFFICIENCY AND SPEED
— For You and Your Customers

DAN BLAKE
Chief Technology Officer,
FieldRoutes

Technology is all about creating efficiencies for businesses and customers and for driving value.

And making our customers' lives more efficient and helping them generate more revenue to drive greater value lies at the heart of FieldRoutes' mission for its partners.

That's one reason FieldRoutes is so eager to introduce Service Bundles in its software for customers in 2024.

FieldRoutes partners can create, sell, schedule and service as a single unit, and then they can bill their customers on a consolidated invoice resulting in payment in one transaction.

Bundles offer a pest control company more visibility in the renewals process and make things easier to see for its customers. Bundles also offer a way to increase return business, build revenue and minimize churn.

Plus, your time is precious, and so is your customers' time. So, making processes faster and more efficient, for our partners and your customers, remains a FieldRoutes focus.

Change has been a constant in life for everyone these last few years, and 2024 has brought even more. Some companies are growing through acquisitions, and others are finding new opportunities, with a few new challenges, through private equity investment. Whether this means a new system or new employees, FieldRoutes' goal is for its partners to become as efficient as possible as quickly as possible.

In addition, FieldRoutes is celebrating the achievements of its customers who reached or remain in the PCT Top 100 in 2024 and is strengthening the software's functionality to allow them to serve their customers and to scale efficiently.

FieldRoutes continues to develop the single platform that pest control companies need to operate, featuring integrations with ServiceTitan's Marketing Pro and Fleet Pro and a robust Marketplace at which FieldRoutes business partners are poised to help fuel your growth.

Of course, artificial intelligence is a part of nearly any business discussion today, and it's no different for FieldRoutes. Functionality that can automate mundane tasks, identify trends and offer analysis will find their ways into FieldRoutes solutions.

Shopping for the best price has always been critical, maybe no more so than in 2024. By making its software efficient and easy to use, FieldRoutes is able to help its customers not only offer the right pricing but differentiate themselves in their markets with superior service.

We trust that you'll find the PCT State of the Technology Market report informative. FieldRoutes, which is proud to continue its sponsorship, remains in position to provide the solutions to help your business operate more efficiently, to scale and grow and to drive the success that you deserve.

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KEEPIN' UP: AUTOMATED, AI-POWERED & ALWAYS CHANGING

There's never a dull moment in the technology space, and pest management companies of all sizes are sampling the latest advances to boost customer engagement, work smarter, save time and do more with less.

Brantley Russell paints a picture familiar to many pest control industry veterans — an evolution from paper tickets and handwritten checks to pay snail-mail bills to today's app-based, real-time software platforms that satisfy the need-it-now modern client.

The shift didn't happen overnight.

But Russell and other respondents to PCT's 2024 State of the Technology Market survey agree that the last five years, and even recent months, have introduced a whole new world of technology.

"I can remember having to update ledger cards with information manually, or go pull files from a cabinet to look for records or treatments or contracts," said Russell, vice president of operations and business development at Jury Pest Services in North Augusta, S.C.

Not anymore.

"The technology we use allows a business, in seconds, to retrieve complete data on a customer and a small or large owner can operate remotely as long as you have a [wireless] signal," he said.

From paper and pencil to complete automation, artificial intelligence (AI), customer experience tools and smarter scheduling functions are rapidly changing in the software landscape. These advances are also prompting more pest management professionals (PMP) to switch, upgrade, enhance or consider buying into a technology.

Eighty percent of PCT survey respondents said they use an operations-focused software program to run their business, and of those who do not, 9 percent are evaluating the options.

Automating administrative tasks and maximizing productivity top the list of benefits for 79 percent of users.

When asked about the last time their locations changed or upgraded software, 37 percent of respondents said within the last two years, with 11 percent migrating to a new or better platform in the last six months. Only 12 percent are using the same software they onboarded more than 10 years ago.

> "The technology we use allows a business, **in seconds,** to retrieve complete data on a customer."
>
> — Brantley Russell, Vice President of Operations and Business Development, Jury Pest Services

Courtney Carace said there have been "significant transformations" in technology systems within the last few years at Pest-End in Plaistow, N.H. Those include AI-powered apps for transcribing customer calls, generating training materials and a survey tool that automatically floats $5 bucks to technicians who receive reviews from customers.

Not to mention, Pest-End also migrated to a completely different software platform in 2023.

All In with AI?

BASIC TRAINING. Some AI platforms can build how-to guides, SOPs and training manuals by documenting processes with visuals and steps as you work through them. For instance, when opening a new customer account, you perform the process and the platform "takes notes" and turns the information into a digestible presentation.

"[It] records the screen and creates visuals with instructions," said Courtney Carace, co-owner of Pest-End in Plaistow, N.H. "We have seen our onboarding process ramp up significantly, and we are getting employees up and running faster this way."

PHONE SHORT CUTS. AI-enabled transcription applications that integrate with voice-to-text phone systems and CRM platforms allow office staff to focus more intently on customer calls, streamline transactional inquiries and maintain call histories without manual input.

"I am amazed at how accurate it is with taking 20- and 30-minute calls and summarizing them into three or four sentences," said Cheryl Chappuis, co-owner of Holper's Pest & Animal Solutions, with four locations throughout Missouri.

Based on tone, the AI call center tool Rose Pest Solutions deployed will identify "at risk" customers. "We have an isolated person call those customers to find out how we can better serve them," said Curtis Rand, vice president of operations at the Northfield, Ill.-based company. He, too, said he is "amazed at what AI picks up."

Carace said with the AI component transcribing phone discussions, "Our representatives are more efficient and far more engaged in conversations because they are not so concerned about typing notes during the call."

ROLE PLAY

How would you characterize the role of software in your company's success?

- 72% plays an essential role
- 17% plays a marginal role
- 11% plays no role in a company's success

Source: Readex Research; Number of Respondents: 264

"I will tell you, I was not excited at the start, and it was a drawn-out process because there are lots of pieces to the puzzle," Carace said. Transferring data is a barrier to change for 20 percent of PCT survey respondents, followed by pricing (15 percent) and simply finding the time (11 percent).

But after onboarding the new program, Carace is now a superfan.

"Once we started using the system, and with all of the support, our business is growing more than ever, and we're not slowing down," she said.

INVITING ENGAGEMENT. Pest-End's revenue jumped from just under $8 million in 2022 to an expected $12.2 million this year, Carace said. Many business owners surveyed and interviewed say technology has allowed for route and revenue growth with minimal hiring or no new staff at all.

"We are more efficient than we were previously, and to have that increase in revenue and not add more bodies has been huge for us," Carace said.

The same is true at Rose Pest Solutions based in Northfield, Ill., with 12 offices. Vice President of Operations Curtis Rand said the business used to be "pretty bare bones" in the technology department, aside from its CRM and cell phones. But that has changed during the last eight years, namely with an automated customer care center through an integrated voice/text/marketing/auto dialer application.

Now, rather than equipping each branch with several customer care associates, Rose Pest Solutions operates one centralized call center. Each market has a local phone number that rings into the center. "That way, we can maximize economies of scale, and we offer more support with 10 people as opposed to 25 people answering calls," Rand said.

The company also experimented with a leadership intern program last summer for college business majors to help implement a couple of new technology initiatives, including Yodeck digital signage for engaging technicians across branches (see "Look at This" on page 5).

Improving customer experience is a technology advantage for 74 percent of survey respondents who said they do a better job with client service because of their software.

"If you don't have a system in place for phone, texting and scheduling, you're going to lose customers," said Anthony Yarbrough, who manages operations at his father's business, Envirotech Pest Control in Menifee, Calif., and just started his own business in Hemet, Calif., Divine Pest Pros.

Yarbrough helped his father move to a pest control-specific software platform and adopted the same program for his business. When deciding whether to use an off-the-shelf system, one designed for service industries in general, or a pest control-focused platform, 75 percent of survey respondents said their program is specific to pest management.

"That has changed our routing, our revenue and our time spent
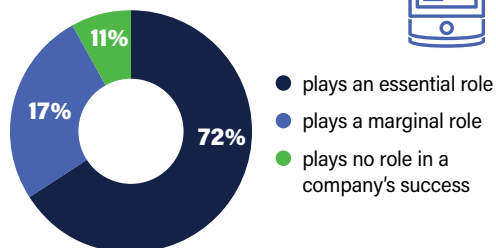
on administrative tasks," said Yarbrough of his dad's operation, estimating they cut communications lag in half.

Yarbrough came from the more technology-enabled automotive industry. "My dad was originally using Google Calendar for scheduling, and I said, 'Look, people don't want paper,'" he said.

To be sure, software systems can push paper out of the picture.

Bill Haynes says his Buford, Ga.-based business is 99 percent paperless since its recent conversion from one industry-based software platform to another. As for the hesitant customers who still ask for printed invoices, "Once they try auto pay one time, they say, 'I like this better,'" he said.

ALWAYS EVOLVING. Haynes also joins the camp of pest control companies that has switched software recently. The move was driven by a few factors. For one, there were apps Haynes Exterminating had in play that would not integrate with the previous program — or, doing so was clunky. He also ran into some issues completing state-mandated reports. "There were a handful of problems that were going to make it difficult to do our job," he said.

When asked what would trigger a software switch or prompt their business to buy a system for the first time, PCT survey respondents cited gaining better financial insights (36 percent) as a motivator, while 44 percent said to improve customer experience, 40 percent to spend less money and

Look at This!

Curtis Rand was looking for a way to engage employees across multi-location Rose Pest Solutions, based in Northfield, Ill. Leveraging technology in all facets of his business, he hatched a plan to connect technicians in Racine, Wis., to staff in South Bend, Ind., with field employees in New Albany, Ind., and so on.

He landed on Yodeck, a cloud-based digital signage program that runs videos on 42-inch TV screens hanging in every Rose Pest Solutions office. "We promote the top 10 service professionals of the month, top 10 sales, announce benefits enrollment or list work anniversaries," said Rand, vice president of operations.

While technicians spend days on the road servicing customers, they do stop into the office — and the Yodeck screens offer some lightweight fun, ignite camaraderie, share information and most of all, Rand said, "There are lots of laughs."

"People like seeing themselves or colleagues or a buddy they met one time two years ago on the screen," Rand said. "When you are a decentralized organization — and even if you are just one location — your service professionals are in and out of the office in a matter of minutes. This keeps everyone connected and it's entertaining for our company."

38 percent to optimize routes.

With the new platform Haynes' office is running, staff can upload pictures and quick-fill notes seamlessly in the field and post to the client portal. Tailored forms now allow technicians to click on products used, rather than manually inputting information into blank fields. It's more automated — another reason PMPs will switch programs.

"As we continue our growth, we are constantly re-evaluating all parts of our business, including the software we use, to ensure it can meet our needs," Russell said of constantly fine-tuning the technology environment at Jury Pest Solutions.

The business formally discusses potential technology improvements during bi-monthly meetings. "We also encourage all our folks in the field to provide us with feedback that would help our interaction with the admin team and customers," Russell said.

For instance, the company asks clients how they prefer to communicate. Its voice-text-email system that integrates with the business operations software complies with requests. "Businesses need to continue to trend their forms of communication based on customers and the limited time they want to spend communicating," Russell said.

TECH ENABLED

Does your location use an operations-focused software program to help run your business?

- yes — 80%
- no, and do not plan on using software — 11%
- not yet, but we are evaluating — 9%
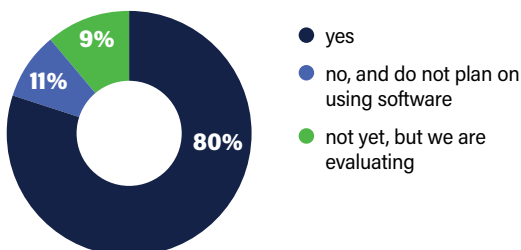
Source: Readex Research; Number of Respondents: 297

DESCRIPTIVE WORDS

How would you describe your location's software program?

- it's designed specifically for the professional pest management industry — 75%
- it's designed for service companies and contractors in general — 16%
- custom or proprietary program built specifically for our business — 8%
- other — 1%
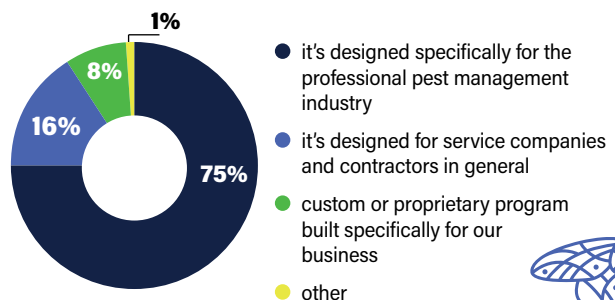
Source: Readex Research; Number of Respondents: 238

This viewpoint aligns with PCT survey respondents who put customer experience at the top of reasons to switch and software advantages, further supporting interviews with PMPs who noted recent moves to AI-based customer care tools help to capture hot leads, increase reactivations, reduce attrition and target marketing based on call requests.

Bobby Rycroft calls the platform his No More Bugs franchise uses a "customer retention saver." Because a primary service is mosquito control, services cannot occur during inclement weather. There is frequent rescheduling during the rainy summer season.

"It's really simple to empty a schedule and reroute it to a different day, and notifications are automatically sent out to customers so they know when we will service their property," said Rycroft, whose operation is based in Raleigh, N.C.

Rycroft said that notes are recorded on each account to form a historic picture. "It's also great to know, when you look through notes, if you have customers who consistently reschedule," he said.

Additionally, all sales forms are loaded into the CRM so customers can sign in-person or by email. "No more paperwork," Rycroft said.

Essentially, the software acts as a single hub for the entire customer journey, from lead to sale to service delivery, along with follow-ups and payment receipt.

"I hope we never change," Rycroft said of the platform the company uses, which is how 15 percent of PCT survey respondents feel.

"There is enough opportunity for add-ons and integrating apps," he said. "We have everything we need." ●

Survey Says, Text Me

Service note emails dispatched to customers from Holper's Pest & Animal Solutions prominently requested Google reviews. "And we never got any — ever," said Cheryl Chappuis, co-owner of Holper's, with four locations throughout Missouri.

The company finally did grab some reviews. But because of the way the ask was proposed, generally the folks who took time to key in their remarks on Google and assign a star rating were upset about something. These squeaky wheels were just a sliver of Holper's customer universe.

This year, the company discovered a feedback-gathering app. It integrates with the company's CRM and operations platform. After each service call is logged, an auto-text hits clients' mobile devices. It asks, "Would you like to leave a review for your technician?" There's a one-liner also informing clients that Holper's will reward technicians $5 for their review. (There's no pressure to dole out five stars.)
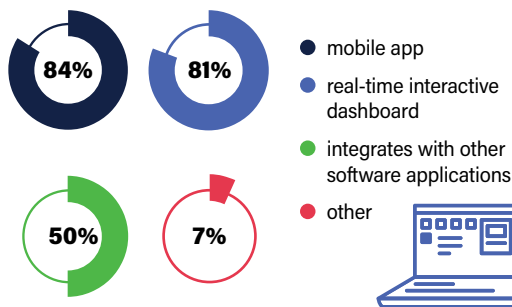
Customers love it.

Since using the app, Holper's has collected about 400 new reviews. It matches each review to the technician and automatically pays the $5 on the spot. Technicians can transfer their bonus review wins to their personal bank accounts each week. "Technicians are getting $30 to $80 on a weekly basis, and it's huge," Chappuis said. "There is also a leaderboard, so they can see who got 15 or 20 or 30 reviews."

Customers have even called into the office if they have trouble with the link or if it's broken, or for some reason they couldn't get online. "I really want my technician to get the $5," they tell Chappuis.

Chappuis appreciates the transparent nature of the program, and when asked how long the company will keep it in place, she said, "Forever. For sure."

FEATURE RICH

Which of the following features does your location's current software program have?

- 84% — mobile app
- 81% — real-time interactive dashboard
- 50% — integrates with other software applications
- 7% — other

Source: Readex Research; Number of Respondents: 238; respondents could select multiple answers

BENEFIT PACKAGE

What are the benefits of your location's current software program?
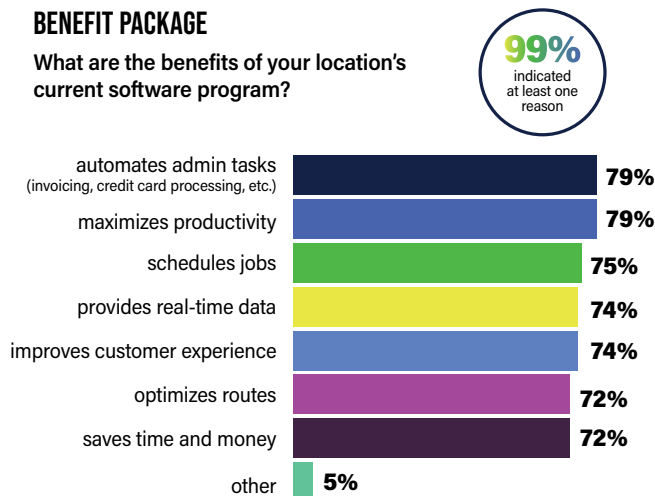
99% indicated at least one reason

- automates admin tasks (invoicing, credit card processing, etc.) — 79%
- maximizes productivity — 79%
- schedules jobs — 75%
- provides real-time data — 74%
- improves customer experience — 74%
- optimizes routes — 72%
- saves time and money — 72%
- other — 5%

Source: Readex Research; Number of Respondents: 238; respondents could select multiple answers

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HURDLE HOPPING

Which is your location's biggest barrier to buying or changing to a new software solution?

- transferring data — 20%
- pricing — 15%
- training staff — 12%
- finding time to just do it — 11%
- other — 6%
- don't see the need for a new software solution — 36%
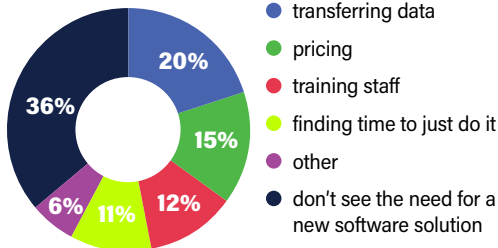
Source: Readex Research; Number of Respondents: 264

BUY TIME

When do you expect your location to buy, change or upgrade its software?

- more than 10 years from now — 5%
- 6 to 10 years from now — 2%
- 3 to 5 years from now — 8%
- 1 to 2 years from now — 10%
- 6 months to almost a year from now — 7%
- in the next 6 months — 5%
- never — 15%
- don't know — 48%

3.6 avg. # of years until expected change or upgrade in software
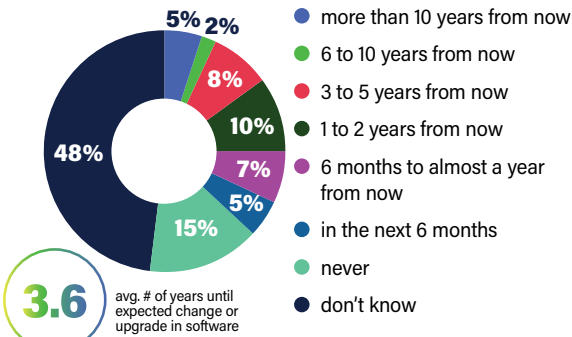
Source: Readex Research; Number of Respondents: 264

COST BASIS

How much does your location currently spend or expect to spend on software per user, per month?

- $301 or more — 15%
- $261 to $300 — 4%
- $221 to $260 — 4%
- $181 to $220 — 6%
- $141 to $180 — 6%
- $101 to $140 — 11%
- $61 to $100 — 16%
- $21 to $60 — 11%
- $20 or less — 6%
- don't know — 20%
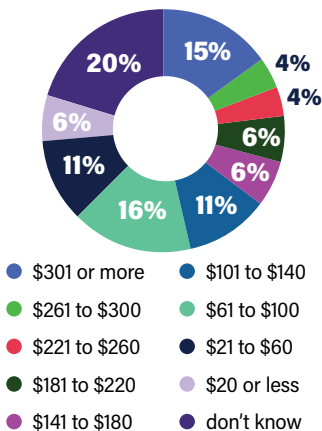
Source: Readex Research; Number of Respondents: 264

UPGRADE CYCLE

When is the last time your location changed or upgraded its software program?

4.8 avg. # of years since last upgrade

- more than 10 years ago — 12%
- 6 to 10 years ago — 18%
- 3 to 5 years ago — 26%
- 1 to 2 years ago — 18%
- 6 months to a year ago — 8%
- in the past 6 months — 11%
- don't know — 7%
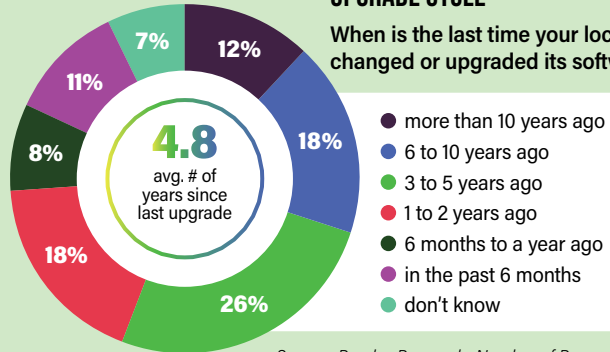
Source: Readex Research; Number of Respondents: 238

REASONS WHY

Why would your company buy or upgrade to a new software solution?

- to improve the customer experience — 44%
- get a better deal/spend less/get more features for the same price — 40%
- optimize routes/scheduling of jobs and missed stops more effectively — 38%
- improve communications/information sharing — 37%
- get better financial insights/reporting — 36%
- get better customer service/support from vendors — 36%
- automate tasks — 32%
- streamline sales and lead generation — 32%
- integrate other software programs that we are using or want to use — 25%
- other — 6%
- no answer — 1%

28% would not buy or upgrade their software

71% indicated at least one reason

Source: Readex Research; Number of Respondents: 238; Respondents could select multiple answers

ABOUT THE SURVEY

The PCT 2024 State of the Technology Market was sponsored by FieldRoutes and compiled by Readex Research, a privately held research firm based in Stillwater, Minn. A sample of 4,512 owners, partners, executives and technical directors of pest control businesses was systematically selected from the PCT database. Data was collected from 297 respondents — a 7 percent response rate — via online survey from June 10-25, 2024. The margin of error for percentages based on the 238 respondents whose company location uses an operations-focused software program is ±6.2 percentage points at the 95 percent confidence level. Charts may not add up to 100 due to rounding.

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- Ari Ivers, Operations Manager, Tuxedo Mosquito Control

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