Being Us.

Brand Manual.

WHAT IS THIS?

Glad you asked. If you're reading this, you're on the Useful team—congratulations. You must be one hell of a gal or guy. A gal or guy who will probably write, design, engineer or just plain make something on behalf of the Useful brand. This manual can help you do that just right.

USEFUL, THE BRAND.

When you write an email to a customer, you're writing as Useful. If you're talking to a potential customer you met at the store, giving a presentation or posting as Useful on social media, you're speaking as Useful. While you should absolutely bring your own personal touch to all you do, because that's what we like about you, we ask that you work to maintain consistency of voice and action while sharing our brand with the world.

WITHIN THE FOLLOWING PAGES, YOU'LL FIND IDEAS THAT WILL HELP YOU UNDERSTAND WHO WE ARE—AND WHO WE'RE NOT.

When you sit down to write, design, build or even make a phone call, keep this manual handy. From the minute you start your work until the glorious second you finish, ask yourself:

How would Useful say this?
What would Useful do?
Is this us?

Then take a deep breath, add your own spark—and go for it.

Welcome to the team.

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OUR PURPOSE

Useful is more than a name that embodies the core benefit of our product. It's a daily reminder of our very purpose. From how we spend our time to the conversations we have with teammates and customers, we should all strive to

BE USEFUL.

Don't wait for someone else to do something. Step up. **Be the linchpin**. Fill in the gaps when people need help. Do whatever it takes to get the job done.

Because that's us.

STAYING TRUE OUR PURPOSE is the only way to meet (or exceed) the very customer needs we exist to satisfy. And, to continue understanding and evolving with those needs, we have to go a step further. As a brand and as a company, we have to be a resource that extends far beyond our product.

Resource

noun re·source \'rē-ˌsȯrs, -ˌzȯrs, ri-'\
A place or thing that provides something useful.

WE SHOULD ALL work to establish and maintain a reputation for our brand as a resource. Not only in the form of Useful, but also by being a reliable source of information and support for our customers and the industry. A few examples:

WE CAN PROVIDE UNDERSTANDING by answering a simple question or by helping someone troubleshoot the product.

WE CAN PROVIDE CLARITY by making sure every single word and image we use to describe the product is as efficient and accurate as possible.

WE CAN PROVIDE VISIBILITY by shining a light on industry trends, or, more personally to a customer, on time being wasted or work being done inefficiently.

WE CAN PROVIDE OPPORTUNITY as our app continues evolving from a way customers can get jobs done faster into the ultimate resource—a way to find more work.

A few more tips for saying and doing things supportive of our brand as a resource:

WE EXIST TO SOLVE BUSINESS PROBLEMS for our customers. We take time to get to know them better and then even better. We listen patiently to their needs and fears.

WE SHARE WHAT WE LEARN with each other. By maintaining an open dialogue about what's working—or not—all insights can be collectively known and those most relevant can be elevated.

WE PLEDGE TO PUT OUR DATA TO GOOD USE, identifying industry needs, trends and insights that can help improve our customers' work lives.

WE HELP OUR CUSTOMERS UNDERSTAND THE BENEFITS OF TECHNOLOGY in ways that can calm fear, uncertainty and doubt related to changes in their industry.

By being a resource beyond what you're here to do, you can help us become the resouce our customers need. And together, we can all go pretty far. Buckled up? Cool.

OUR VALUES

WE PUT PEOPLE FIRST.
You. Each other. Customers. Our customer's customers. Serving people first is how we serve our purpose.

WE SIMPLIFY.
Complication is a choice. We simplify. Our app. How we communicate. How we work.

WE EMBRACE CHANGE.
In fact, change is what we represent. Yes, change is hard. We believe it's worth the trouble.

WE LOOK AHEAD.
We keep one eye on the future. We discard habits and plans that are destined to become obsolete.

WE DON'T COMPROMISE.
Every damn detail is worth doing right. Every damn time.

WE FINISH STRONG.
We focus on results, not just effort. We do our homework. We triple-check. We see things through to the best solution possible and communicate when work is done.

OUR CHARACTER

THIS IS WHERE WE DEFINE WHO USEFUL THE BRAND IS. The word ‘you’ below represents our customers, friends and anyone we have the pleasure of talking with or doing business with. Filter your actions (and reactions) through this point-of-view and before you know it, being Useful will be second nature.

—

We’re that old friend you can always count on. We’ll help you move the couch then sit down with you afterwards and crack open a beer.

We know the value of elbow grease. And we don't try to avoid it. Hard work is satisfying, especially when we're helping others.

We take pride in what we do. We work with purpose and precision while maintaining a level-headed sense of humor.

We're reliable. We'll stay up late, get up early or spend our weekend helping—whatever it takes to make things right.

We give good advice, not lip service. We communicate respectfully. And we stand by our word.

We never patronize or lecture. We share our thinking in a friendly (never sugar-coated) and honest way.

We're good with shining a light on the need for change rather than tiptoeing around it.

We accept responsibility for our actions. If we steer you left when right was right, we apologize.

OUR CHARACTER STORY

WE'VE PUT YEARS OF SWEAT AND GRIT INTO SOLVING PROBLEMS—and we're not slowing down anytime soon. The challenge our customers face is one we were born to solve. We work to make it easy for those who build, repair, install and maintain to use modern technology that can help them manage jobs better. And that's no easy task.

We build software. Our customers need more than that. They need a friend devoted to helping them navigate change. Technology isn't going anywhere. Our customers can only sidestep it for so long before falling detrimentally behind. Phonebook-in-an-internet-world behind. We can't let that happen.

We're building a product and bank of resources to make our customers' work-lives better. If we have to work late, we do. If we have to start over, we will. And we have. More than once.

We work quietly. Our customer's success will tell our story. Boasting about what we make is not our style. **We came here to work. And our work is never done.**

VOICE & TONE

VOICE AND TONE ARE NOT THE SAME. Voice is consistent, tone changes. It's that simple. Here's some deeper context demonstrating and defining the two:

Voice is who we are. It's singular and unchanging. It should be present within our product, website, social, and marketing communications. If our voice is flat, we won't stand out. If our voice is too sharp, we risk being put on mute. Three things guide how we use our voice:

AUDIENCE. Who are we talking to?

MINDSET. Is our audience a stranger, customer, happy, unhappy—where are they coming from?

CONTEXT. Are we on Twitter, giving a presentation or writing a script for an instructional video?

While these factors will vary, everything we say should sound like it's coming from one source: us. A few examples:

Greeting someone in our voice:
Hi there. (informal, warm, comfortable)

Greeting someone in Apple's voice:
Hello. (formal, modern, robotic)

Tone is all about how we say what we're saying. You communicate with children using a different tone than with adults, and you employ a different tone during a job interview than you would on the phone with your best friend.

Greeting someone in a playful tone:
What's up, buttercup?

Greeting someone in a friendly, straightforward tone:
Hi there. How was your day?

OUR VOICE

PRESENT IN ALL WE SAY AND DO, our voice represents our core qualities. When Useful talks, we're:

STRAIGHTFORWARD. NEVER CONFUSING.

We use plain English. We avoid vague words/phrases and overly complex terms. We never use 12 words when 4 will do. We avoid leading with jargon and shoptalk unless our audience initiates it. It's okay to use industry jargon you're comfortable with (and can speak fluently) to demonstrate that you understand where your audience is coming from, but only if they go there first.

FAMILIAR. NEVER COLD.

We've known our customers for a long time. We speak in a way that makes them feel comfortable and at-home. We use words they know and understand.

HELPFUL. NEVER BOSSY.

We communicate what's important to our customers. We don't want to waste their time by sharing information they already know. We also don't talk like we know their world better than they do. Helpful is one step beyond educational. Helpful is not presumptuous. Helpful is empathetic.

SPECIFIC. NEVER VAGUE.

We always speak clearly and believably by using concrete terms. We don't say "We've solved it.", which may come across as a sales pitch. We say exactly what we mean. For example, "We've finished our new timesheet tool. She's a beaut."

HONEST. NEVER EVASIVE.

We tell it like it is (with tact). We're honest about the capabilities and limitations of our product and we don't make promises we can't keep. We communicate in ways that reinforce our reputation as a trustworthy resource.

CONFIDENT. NEVER COCKY.

We know who we are, where we've been and where we're going. We believe in our product, but we never boast. We don't say "Wait until you see our new timesheet tool." We say, "Our new timesheet tool has been months in the making. Give it a try."

AUTHENTIC. NEVER FAKE.

We never overreach to sound like something we're not. Using trendy words and phrases to impress or conform isn't our style. Words like vibes, totes and brillz are not us. Words like feelings, completely, and smart are.

OUR TONE

We're casual, but not overly sweet. We're real, human, and we have manners, but we don't beg.

Yes: We're very sorry and we truly appreciate your patience. The next month is on us.

No: We're so, so sorry! What ever can we do to make this up to you?

We're a brand of few words. Even so, we always choose a phone conversation or catching up with coffee or beer over emailing someone.

Yes: Can we grab coffee and talk next steps? We'll come to you.

No: Here are our thoughts on next steps. Forgive the long email, no time to write a short one!

We say goodbye with a head nod or simple toss of the hand, not an overly enthusiastic wave.

Yes: Talk with you soon.

No: We can't wait to see you tomorrow!!!

We are very comfortable in our shoes, and we've worn them around the block. We're not timid or overly analytical.

Yes: Timesheets are always a bear, but a one-tap start and stop sure helps.

No: Timesheets, ugh! We know, we know. What else could we do to make them better? Is there something we're missing?

Humor is good, balance is critical. Beware of attempts at being funny, especially in the form of easy puns. A single word can add personality where it's lacking—a joke is rarely necessary (or effective), especially with our audience.

Yes: Timesheets done. Enough said.

No: Get your timesheet on.

WRITING GUIDELINES

DO'S, DON'TS & TIPS

DO

Do | put usability and clarity before tone and cleverness. The goal of communication is understanding. If usability, readability or clarity is being sacrificed to make room for tone or cleverness, erase and get back to basics.

Do | refer to Useful as an app. Not platform, solution or resource. "Tool" is acceptable within an appropriate context, and if it's preceded by "app" within relative distance.

Do | be consistent. Don't drastically change your tone within one piece. Injecting personality is great, but make sure there's a common thread. If copy is casual, stay casual.

Do | use an active voice. An active voice is clear, crisp and succinct. Say "We took out the trash." rather than "The trash was taken out." Words like "was" and "by" are often clues you're using a passive voice. Look for them and rework those sentences when it's appropriate.

Do | be positive. Even if you're working with a customer or teammate who is not happy, maintain a tone of positivity. Say "We are incredibly sorry. Let's see what we can do to solve this." rather than "We're so sorry. We wish there was something we could do."

Do | avoid exclamation points as much as possible. Try expressing your sentiment through words rather than punctuation. Exclamation points are appropriate in very few situations. If every email, Tweet or blog post you're writing contains at least one, you're going too far.

Do | use the phrase 'field service industry' with caution. While Apple and Wall Street identify those in construction, plumbing, lawn care, etc. as the "field service industry", this phrase may not resonate with those we talk to most—people in the industry. Consider your audience. In a conversation with Apple or an investor, it's fair game. And public-facing communications may include the phrase—within a blog post about industry trends, or where we need to very concisely describe what we do, as within our social bios. Given these exceptions, try not to use 'field service industry'—unless someone goes there first.

Do | encourage natural usage of the word 'useful' to describe us. Occasionally, a beautiful thing happens. People naturally choose the adjective useful to describe our app ("Photos of the job site sure are useful.", etc.) This is a desired outcome we should encourage and humbly acknowledge, both in actual and social media conversation. We can do so by saying things like, "Thank you. That's the idea!" and "We're so glad you agree." Be sure to read the next point, as it's an important distinction.

PLEASE DO NOT

Do Not | use the word Useful outside of a brand or product reference when communicating externally. While it's fun to catch others tossing around the word useful to describe us, we should avoid it ourselves. Yes, it's a fine line. Here's the thing: We lessen and abuse our brand's power when we do things like use our name in an email sign-off, for example. Phrases like "Get Useful", "Stay Useful" or "Be Useful" should be avoided in external communications coming from us. We may encourage our Twitter followers to use #BeingUseful or something related, in order to join or track a conversation, but this would be the only exception.

WRITING FOR USEFUL

While introducing our brand voice, we noted three factors to consider when writing for Useful:

AUDIENCE. Who are we talking to?

MINDSET. Is our audience a stranger, customer, happy, unhappy… where are they coming from?

CONTEXT. Are we on Twitter, in a customer presentation or writing a script for an instructional video?

Following are a few tips for considering these factors and how much they may shift your writing or conversation.

AUDIENCE GROUPS

GET TO KNOW THE USEFUL CUSTOMER PERSONAS. THEY ARE YOUR FRIENDS.

Decision makers - Bob, Roger, Cheryl*

- Decision makers may be closed-minded and/or jaded about technology use. Keep this in mind and take care not to assume their stance on technology, much less, Useful.

- Open their minds by mentioning high-level benefits related to their top pain points, then quickly substantiate those by briefly explaining how our product can help.

- When participating in two-way communication with this group, via social media or email, work to ask questions and listen. Really listen for understanding. And keep listening.

- This audience has unique pain points, different from managers and day-to-day app users. If you're having a conversation with one of them, or writing a piece that targets them, focus on those pain points within the personas or that they may have mentioned while you were listening. Thoughtfully consider how we can help address them. The more specific we can be, the more convincing and believable we will be.

- Decision makers are one of our most important audiences, however, they're heavily influenced by the following groups. It's important to let them know we understand the questions and concerns they'll face from their team. We're prepared for that and can help them prepare for it, too.

**Reference: Useful Personas*

Influencers - Jason, Louis, Jeremy, Keely*

- Influencers are afraid that technology will screw up their everyday work lives, making their jobs harder. They act out of this fear to change the minds of their decision makers.

- Influencers can derail decision makers very quickly. They can also positively influence decision makers, so it's critical to win them over early, demonstrating how we can make their lives easier in as many ways as possible.

- Influencers are leery of being sold to and skeptical that we actually understand their worlds. From their point-of-view, there's no possible way we could understand the intricacies of what they deal with, day-in and day-out. Ask them questions and listen. In static communications, demonstrate by showing, not saying, that we know what it's like to be in their shoes. Don't say, "We know your world." Show it: "Paperwork. Yeah, we understand."

Heavy users - Louis, Jason*

- Heavy users enter 90% of the information into the Useful app. While everyone else accesses it often, these guys are the ones responsible for populating the system. Note they're also influencers.

- We've made sure the app is familiar and easy for these guys to use. Demonstrating this ease early in conversation or in static communication is a good way to show them we've done our homework.

MINDSET

CONSIDER WHERE YOUR AUDIENCE IS (MOST LIKELY) COMING FROM BEFORE YOU SPEAK TO THEM.

Unfamiliar/Unaware - Anyone we're talking with or targeting with marketing who may have never heard of Useful before—even if they're one of our personas, we cannot assume they know anything about us or we risk being unclear.

- Choose your language carefully to make sure it's clear. "Manage jobs better" entirely out of context doesn't give a reader clarity about what Useful is or does. What kind of jobs? Managed how?

- Visual context can add clarity, too, so consider what's being shown visually alongside your writing. Does what's shown in the image allow you to simplify? Does it change your explanation?

- If someone is unfamiliar with our brand or product, what's the most important thing you want them to remember? Considering your target audience is necessary to answer this question.

Curious/Interested - Anyone who contacts us expressing interest in the brand or product. Maybe they download a white paper, comment on a blog post, or swing by our booth at a trade show.

- We have this person's attention. What can we tell about who they are and where they might fit into our audience group based on what they've shared? What can we ask to learn more? What can we communicate that lets them know we care about their interest, but doesn't overwhelm them?

- If they ask any clarifying questions, assume they're unfamiliar with our brand or product and speak to them appropriately.

Very familiar/Very aware - A customer or warm prospect. They know the basics and are ready for the nitty-gritty.

- If someone is very aware of our product, steer the conversation towards specifics as soon as possible. Why are they interested in Useful? What's the state of their day-to-day workflow?

- In static communication, try to avoid giving them new information coupled with familiar information that they have to sort out. Take the time to determine exactly what they need to know and only deliver that.

Confused/Frustrated

- If someone is confused about our product or an experience related to communication with Useful, respond to them with straightforward, unemotional language. Jump on the phone instead of emailing, if possible.

Happy/Satisfied

- If someone is expressing happiness as a result of using our product, encourage this feeling by expressing genuine (not overly sappy) gratitude for their business. Think of it as a virtual high-five, handshake or hat-tip—whichever level of enthusiasm appropriately matches theirs.

- If they're responding to a particular feature or product experience, feel free to suggest a hint that could further enhance their experience. For example, if they compliment the timesheet feature, ask how they like the one-tap start/stop functionality. (Only if that is not the very thing they originally complimented. We always want to show our customers we're listening.)

If you're uncertain about your audience's awareness level, assume it's low or nonexistent and speak in the most clear, concrete terms possible about our brand and product.

CONTEXT

WHERE ARE WE COMMUNICATING? A FEW NOTES ON HOW CONTEXT CAN CHANGE THINGS.

App

- Take clarity one step further. Everything should be even simpler than the website.
- Avoid sophisticated punctuation like em dashes and semicolons as much as possible. They become visual noise within a magnified framework.
- If you abbreviate something (Avg., Hrs., etc.) make sure it's clear within the context surrounding it. Spelling out the word is worth the design thinking to make space if it means a user could otherwise be stumped.
- Our customers live in our app. How can we demonstrate our brand personality within the app itself? While the writing should be as simple as humanly possible, we should look for ways to share our personality, helping to solidify the brand in one of its most powerful outward expressions.

Website

- Clarity rules. Once you know what you want to communicate, work to do so in as few concrete words as possible.
- Our website is our living, breathing brochure. If we mention something it should be newsworthy. If there's news, it should be mentioned. Depending on the news, our blog or Twitter may be a more appropriate platform than the website.
- Benefit-oriented language is best. Features have a place, too, but most readers won't care to read in-depth, feature-oriented details. They care how Useful can help them.

- Consider mobile. How does your language translate? Is it quick enough?
- Consider the visuals. How do they complement the copy? When product screens are shown, imagine seeing those with the eyes of someone unfamiliar. Do they make sense as they're shown, or do they require a little more explanation?
- Respect the attention span. How many seconds do you spend on a website that doesn't grab you right away?

Email

- We write many emails in a hurry. Double check the following to save yourself embarrassment:
    - If you ask someone to call you, did you include a phone number?
    - If you mentioned an attachment, did you attach it?
    - Spell check and reread one more time for typos. Every damn detail. Every damn time.
- Take time to greet people appropriately. "Dear Brian" will likely always be too formal, whereas "Heya Brian" may be too informal. How would you say hi to this person in real life? Say that.
- Don't abbreviate Thank you. If you mean to sincerely thank someone, say Thank you or Thanks rather than "Thanx!" and especially not "Thx". Consider our brand character. Be real, be genuine.
- Can any paragraphs be made into bullet points to increase the likelihood they'll be read?

Video

- Instructional: Instructional videos should be written for clarity. Intros and outros can include dashes of personality, but strive to put yourself in the viewer's shoes. Does every-thing make sense?

- Make the beginning as interesting or simple as possible. People are looking for a reason to stop watching—don't give them one.

- Avoid using terms only we are familiar with. It's easy to do when talking about features we know inside and out—remember to temper your word choices for those unfamiliar.

- Call-to-action: Whether you're writing for an instructional or a marketing video, always include a call-to-action. "For more help, visit____." "To request a demo, go to____." "To speak with someone on our team, call XXX-XXX-XXXX." Think about an action you'd like the viewer(s) to take and don't miss the opportunity to prompt them.

- Marketing: Marketing videos should be written with benefits in mind, not features. A combination of both could be appro-priate, depending on the agreed-upon concept. A voice over could speak to benefits while features are shown on-screen. Video is a versatile medium and allows for a lot to be communicated, but we still need to keep it simple and easy to grasp for a viewer. If we overwhelm them, they won't remember anything.

Blog

- Consider the purpose. Are you sharing a story or educating? Consider the tone, and your audience. Choose language that checks back to your purpose.

- What images can you include to make things more interesting?

- Whose voice are you capturing in this blog post? Are you writing as yourself, employee of Useful? Or, are you writing anonymously as the Useful brand? Always put our defined voice and tone into practice, but consider authorship as freedom to push different levers within that tone and voice—especially if you're writing as yourself.

- Can any paragraphs be made into bullet points to increase the likelihood they'll be read?

White paper

- White papers are meant to teach the reader something. Any narrative should be wrapped around facts and data that help support your overall purpose. Being specific and concrete will maintain your credibility and add value to the reader's experience.

- Consider using graphs, tables and imagery to demonstrate your points wherever possible.

- As always, consider whether any paragraphs can be made into bullet points.

Social media

- Facebook
    - People are on Facebook to be entertained. To see what's going on with their friends and family. Speak to that mindset. Don't bore them.
    - Brevity is key. Facebook captions should stay under 50 characters, if possible.

- Don’t use hashtags. That ship sailed on Facebook’s stormy seas long ago.
- Use photography, imagery or video when possible. And when you do, don’t post two paragraphs of text to go along with it.
- Consider the percentage of content that’s educational, informative and just plain entertaining. Post a mix of each. Refine what you post based on what our audience is responding to.

• Twitter

- People visit Twitter for news and information (and, to be entertained or distracted, too).
- Easy on the hashtags (more than 2 = too many for us). Use only those relevant to our industry or a time period, especially related to live-Tweeting events. Otherwise, don’t communicate in a hashtag what you can say in your text.
- Easy on the promotional hashtags (#GetUseful, #PoweredByUseful, etc.). Unless we’re actually prompting others to use them within a Tweet, try not to include hashtags like these within every single Tweet. Looks like we’re trying too hard rather than being authentic. And, turns fun/added-value tweets into overly promotional tweets, which we should limit.
- Tag other brands or people when you mention them.
- Take time to like other posts and retweet other posts, but don’t overdo it.
- Use words to convey tone and/or sarcasm. Never use emoji.

GENERAL GRAMMAR AND PUNCTUATION

Em dashes are a great way to connect two thoughts, add a longer pause than a comma, and to set off important bits of a sentence. When using them, make sure to follow two rules:

- Use a true em dash, created by holding Option + Shift + hyphen keys on a Mac (in HTML: —) None of this--please.

- Maintain consistency with spacing. We prefer em dashes without spaces on either side of the word, in other words—do this <- not -> well — this.

- Consider context. If you're writing for our actual website (not the blog) or writing for the Useful app, a hyphen may be more appropriate than an em dash. Talk with a designer to help you decide.

Words to avoid

We are Useful. That's our name. Don't wear it out.

"Thanx" or "Thx" in place of "Thank you" or "Thanks".

"Field service industry/workers" should only be used with appropriate audiences (see pg. 10)

Ain't

Totes

OMG

LOL

Vibes

Anything trendy or shorthand. Remember our brand character. Be real, be genuine.

LESSEN CONFUSION WITH FEWER MISTAKES. KEEP YOUR EYES PEELED FOR THESE COMMON ONES.

- **You're** (a contraction for you + are) vs. Your (a singular possessive pronoun)

  You're a linchpin in this company. // Your input is always valued.

- **Our** (a plural possessive pronoun) vs. Are (a being verb) vs. Hour (a noun)

  Our mail has arrived. // The letters are still unopened. // We will leave in an hour.

- **It's** (a contraction for it + is or it + has) vs. Its (a plural possessive pronoun)

  It's raining now. // The earth is claiming its daily drink.

  - This one is tricky. If you're unsure which to use, try replacing it with it is or it has. If neither of those phrases works in its place, then its is the word you need.

- **They're** (a contraction for they + are) vs. Their (plural possessive pronoun)

  They're on their way. // Their car is a black SUV.

- **Effect** (as a noun, "result"; as a verb, "to bring about or accomplish") vs. **Affect** (verb only; "to influence")

  She had an effect on me. // How will the rain affect our afternoon?

- **Less** (overall volume) vs. **fewer** (quantifiable number)

  There is less candy in the jar. // There are fewer pieces of candy.

- **Use of the Oxford or serial comma:** Avoid it. This comma is overly formal. We're not.

  Do: *He packed the hammers, nails, nailers and ladders.*

  Don't: *He packed the hammers, nails, nailers, and ladders.*

- **Watch and double-check your use of 's**

  - When forming possessive singular nouns, use 's regardless of the final consonant: Charles's dog, a witch's curse
  - Pronominal possessives hers, its, theirs, yours and ours have no apostrophe.
  - Indefinite pronouns use an apostrophe and s to show possession: One's favorites, somebody else's hat
  - Use of an apostrophe (when not indicating letters are removed, such as in "don't" and "it's) is to show ownership: The runner's medal, the dog's collar, the sun's rays
  - If the last letter of the owner's name is an s, place the apostrophe on the end without adding the extra s: Mr. Smithers' grin, the Elves' promise

A few notes on numbers

- As a rule, whole numbers smaller than ten are to be spelled out. On the web and mobile, however, copy is often read and understood faster when numbers are represented with their numerals. Context can help you make the call. One example to consider is:

- Time sheets. Done 3x faster. vs. Time sheets. Done three times faster. Do you feel the difference in quickness of the first read vs. the second?

- If a number begins a sentence, select a word over a numeral. Two time sheets away from Friday. Not bad.

- Don't write two numbers next to each other. Instead of saying "7 5-foot boards" you should spell out one number: Seven 5-foot boards.

VISUAL GUIDELINES

OUR LOGO, COLORS PALETTE, TYPOGRAPHY & ICONOGRAPHY

OUR LOGO

Useful's aesthetic is simple, clean and functional. While the colors are modern, they're also a throwback to brands and colors of tools—think hammers, saws, drills—that Useful customers use every day, much like the generations of craftsmen before them. The inspiration behind our overall visual design and branding is the fact that a tool can be incredibly practical and straightforward, but only if it is perfectly designed to perform its job well. This practical precision is what we should aim for within our app and when designing various pieces of communication for people who view and interact with our brand.

FULL COLOR

Useful

ONE COLOR

Useful

REVERSED OUT

FULL COLOR*

*Only use on dark backgrounds

ONE COLOR DARK*

*One color logo can be used with Useful color palette as a background.

APP ICON

USEFUL PRO

USEFUL CREW

OUR COLORS

Jay's a color guy. So of course, careful thought was given to the current range of brand colors. They were chosen to hang together, connote the Useful brand and also to work well within the app itself, considering the fact that the app is often being used outside in bright sunlight. From our perspective, there is such a thing as the perfect purple (and gold and red). In other words, these are the perfect colors for us. Please don't f*** with them.

BRAND COLORS

	RGB	Hex	Pantone	CMYK
	153, 153, 153	#999999	Cool Gray 9	0, 0, 0, 40
	14, 116, 150	#0e7496	PMS - 307	91, 23, 0, 41
	231, 100, 37	#e76425	PMS - 1665	0, 57, 84, 9
	201, 36, 52	#c92434	PMS - 186	0, 82, 74, 21
	253, 181, 21	#fdb515	PMS - 109	0, 28, 92, 1
	73, 48, 135	#493087	PMS - 2735	46, 64, 0, 47
	120, 170, 66	#78aa42	PMS - 382	29, 0, 61, 33

OUR FONTS

MARKETING AND DIGITAL TOUCHPOINTS

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**Can also be referred to as San Francisco*

OUR ICONOGRAPHY

Personas

PEOPLE YOU SHOULD KNOW

WE'RE BUILT FOR PEOPLE, NOT PROCESS.

Our product and services have been shaped by insights we've discovered while actually talking with our customers—not by simply studying their jobs. There are 3 big hurdles that consistently keep those we're built for from adopting technology. We call these hurdles the three points of friction. As you get to know our personas, keep these in mind as some of their core concerns.

POINTS OF FRICTION

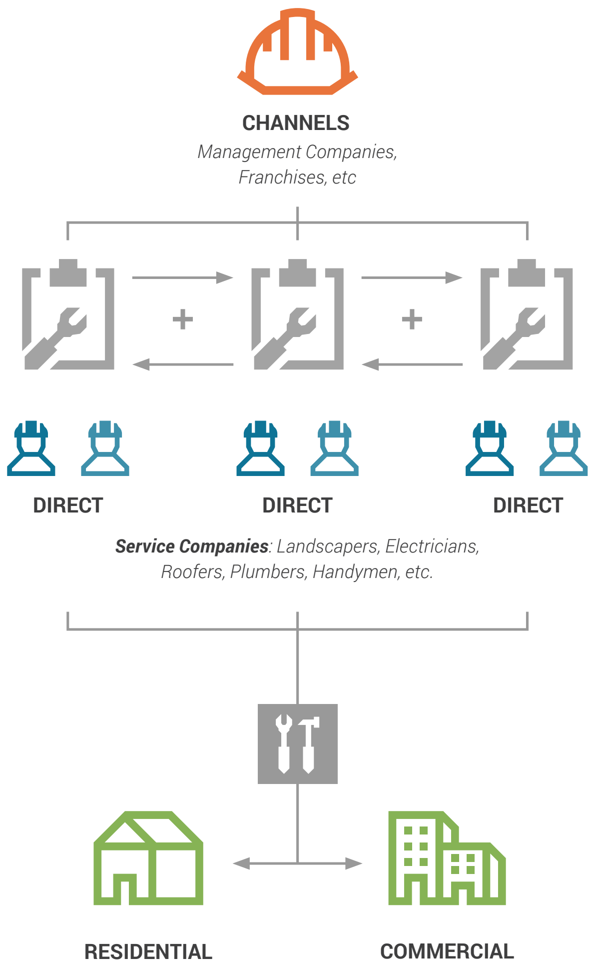
Front line workers don't use technology. We've built an app front line workers will actually use by emphasizing the importance of usability to reduce training time and adoption.

Setup is a nightmare. We've created pricing plans that include devices, making deployment of devices to the field easier and payment for devices simpler. By making sure our product is easy to buy, deploy and use we make sure our customers can get up and running fast.

Industry businesses don't have one unifying system they can use to communicate and share business. Passport is a feature and a unique service offering to Useful customers. It creates a way to share work/information across companies and customers within the Useful app. Those subscribed to Passport can experience seamless communication and work sharing across companies without the hassle of additional networking, paperwork and time.

Useful is built for the entire ecosystem that our customer personas navigate daily.

THE ECOSYSTEM



OWNER / ORIGINAL HAMMER SWINGER

BOB NOLAN

OWNER OF CONSTRUCTION CO., KINETIC CONSTRUCTION

MY MANAGEMENT STAFF IS VERY COMPETENT. Business is consistently busy but responsible growth is always necessary, as is maximizing profits. I understand that embracing technology could help. Our accounting solution allows partial visibility into the big picture, but not enough.

We need an always-on, always current system that provides insights for proactive, high-level decision making.

I started this company swinging a hammer myself, so while details aren't super important to me, I want (and value) a deep understanding of company health and staff activity. There has to be a way. And, if it's a digital tool, it has to be a big picture tool that also helps facilitate our day-to-day activity—no more this here and that over there.

Whether I want to open a job for my daughter's house or get a read on quarterly profitability—and do either quickly—it just has to be simple.

Isn't that how technology is supposed to be?

PAIN POINTS

- Real-time visibility into daily operations
- Disjointed software and the never-ending "hunt" for information
- Understanding job profitability by job type or activity type
- Reactive vs. proactive decision making
- Accountability for work performed

BOB'S GOALS

REPORTING

We have goals in place and the only way to track against those goals is to understand what's happening in every department at a glance.

Reporting is huge. Reporting can also help uncover problems and issues before they become unmanageable.

SALES ACTIVITY

- Are we meeting targeted annual goals? (i.e. compared to last year)
- Who is performing/not performing? (sales by employee)
- Who are our big accounts? (highest revenue generating customers)
- What is our projected revenue (Quotes approved & in queue), projected costs (larger material quantities in Quotes), customer service results & amount of repeat business?

PRODUCTION ACTIVTY

- How many active jobs are in production?
- What is the employee workload? Do we need to hire/fire?
- Are jobs coming in on-budget and on-time?
- Are there any customer service issues, craftsmanship/warranty frequency, accident reporting?
- Are we nimble? My teams need the right resources to make game-time decisions and avoid stalling work.

STATE OF THE STATE

- Market activity
- Services in demand
- Areas to expand/reduce
- Investment in infrastructure to be made (assets)
- Employee turnover
- Labor costs (overtime and outside sub-trade work)
- Any skilled labor gaps
- Continuing education/training

EXEC / GENERAL MANAGER / OPS MANAGER

ROGER GENTRY

GM, KINETIC CONSTRUCTION

AS THE OWNER'S RIGHT-HAND MAN, the company's health is my responsibility and I'm bonused based on performance. I started as a skilled craftsman myself but now my focus is streamlining operations. I enjoy being in a position to take the company to the next level, be that through technology or otherwise.

Our past operations philosophy has been very trust-based (assuming things in the field are happening how they're supposed to) and while I do trust our staff, I'm also fully aware that we could be far more cost-effective.

Understanding who did what, when, is critical when you're the point person for reinforcing company standards and expectations. And I can't be everywhere at once.

PAIN POINTS

- Day-old data (waiting for paperwork to come back from the field after a day's work)
- Last-minute scheduling / no grasp on staff availability
- Training new hires on overly complicated processes and various software platforms
- Controlling overtime labor expenses
- Knowing where crews are at any time
- Managing overall job profitability
- Coordinating materials acquisition
- Lack of consistency in quotes

ROGER'S GOALS

DAILY EFFICIENCY

The daily schedule is a hot topic every morning. We begin each day making sure everyone is aware of any new issues. My focus is making sure problems are being resolved and appropriate steps are taken to prevent future issues. I need to have my eyes on every job that comes through the door. I work on performance reports by job and individual employee as well as negotiations to ensure costs are aligned with vendors and subcontractors.

JOB PERFORMANCE

- Are we quoting new job opportunities in line with company standards?
- Once jobs are approved are they being run on-budget and on-time?
- Does the staff have the assets, information and access to other resources they need to get the job done? If not, how can we change that?

COSTS

- Are we leveraging our buying power with vendors and subcontractors?
- Do my managers have visibility into overtime to control labor costs?
- If we're losing bid opportunities, I want to know why and adjust accordingly.

ACCOUNTING / BACK OFFICE

CHERYL WATTS

ACCOUNTING & PAYROLL ADMIN, KINETIC CONSTRUCTION

MY TWO MAIN RESPONSIBILITIES ARE ACCOUNTING AND COMPLIANCE, which means paperwork—and lots of it. I handle it all, whether it's incoming, outgoing or circulating internally. From new/exiting employee paperwork to timecards and payroll, every bit of it touches my desk. Job contracts, subcontractor and vendor agreements, customer contracts, compliance forms and filing ("compliance" sounds like one thing—try ten things), accounts receivable (A/R), accounts payable (A/P) and all purchase orders (POs) go through me. I reconcile all costs and payments for our work and above all else, I'm responsible for making sure the proper paperwork is in place to limit the company's exposure to risk and liability.

A little known secret: I've never actually been on a job site and would love to understand what our guys actually do out there.

PAIN POINTS

- Illegible Handwriting (field job logs and subcontractor invoices)
- Delays in receiving and/or forgotten required, job-related paperwork
- Missing receipts
- Missing job logs/time cards
- Poor access to field activity (when did work start, end, who was on-site, etc.)
- Managing compliance issues (i.e. subcontractor insurance expiration information and dates)
- Fast access to historical job-related data when questions arise
- Training new hires on multiple software platforms
- Knowing where to find (sometimes urgently needed) answers within multiple software solutions

CHERYL'S GOALS

DAILY EFFICIENCY

The majority of my time is spent processing, scanning and filing paperwork to make it accessible to others.

My "Inbox" is bottomless, so the idea of going to a paperless system sounds like a relief, but also sounds a little scary.

It would probably eliminate a lot of my time spent tracking people down to ensure we've paid them and confirming that our customers have paid us so that we can finish a job strong. Knowing who is on any given job is very valuable information to me. When questions arise, nothing gives me more anxiety than time spent trying to determine who might have an answer. I might field a call related to Workman's Comp about one guy on a crew of twelve—and for a job we finished four years ago—causing me to head to the dungeon (aka the file room) to find one folder amongst hundreds of boxes.

JOB ACTIVITY

Do the guys in the field (who are often positioned best to secure necessary paperwork from customers) truly understand the documentation we need to get a job done? This includes several legal documents requiring customer signatures, all determined by the type of work being performed (acknowledgements, disclaimers, etc., which limit our exposure to misunderstanding & litigation) and receipts.

Some jobs require third party inspections to verify project progress before we can get an incremental payment disbursed. For example, with an insurance claim, the mortgage company may be included on a check for payout. The mortgage company then requires their own inspector to sign off on progress made before releasing funds for the work, so it's important that I understand exact project stages in order to coordinate these inspections and get us paid.

EMPLOYEE & PARTNER COOPERATION

Our field guys do not have time or respect for the importance of paperwork, as is made obvious by their horrific handwriting.

I maintain a stack of illegible paperwork as a reminder to find the appropriate employee(s) to help decipher what they've written.

The guys are only in the office for brief windows of time, so by the time I get to them, days have gone by and memories have faded. Digital, real-time data entry would solve this bottleneck. Our subs are just as bad. We have to make sure their invoices match our contracted agreements. Simply managing their compliance and making sure their insurance hasn't expired is a new level of babysitting.

SALESPERSON / ESTIMATOR

JASON SANDERS

SALESPERSON & ESTIMATOR, KINETIC CONSTRUCTION

I'M RESPONSIBLE FOR COMPANY SALES. I stay busy meeting new/prospective customers and working to grow relationships with existing customers, all while constantly educating them about our expertise in order to better instill trust in our capabilities. I live and die by our promises made to others. The key to success is offering comprehensive solutions that solve problems or meet a need, and while prospects might not always buy everything in a proposal, proposals help others learn more about our full scope of services and plant seeds for follow-up opportunities. I want my customers to consider me a one-stop shop for their property needs. Our reputation is everything and I'm the face of the company, all the way up to the real decision makers—my favorite people in the world. This is both exhilarating and terrifying but I wouldn't have it any other way.

PAIN POINTS

- Understanding why bids get approved vs. rejected
- Clear and accurate site/customer access details and directions
- Strategic sales route navigation/appointment scheduling
- Capturing accurate details of customer requests
- Photo management
- Timely turnaround for bid requests
- Easily updating an estimate if a customer's scope of work changes
- Accuracy related to delivering expected profit margins with bid submissions
- Job progress updates
- Negative feedback from production on quotes incongruent with profitability goals (pricing out accurate material/labor rates)
- Time involved in bid preparation
- Performing customer follow-up for bid approval /rejection status

JASON'S GOALS

DAILY EFFICIENCY

If I'm not in the field I'm not making money, so I avoid the office at all costs.

I'm out in the field and meeting with customers for most of every day. I know some office time is necessary but this is 2016! My vehicle is effectively my office—the more I can do from the road, the better equipped I am to meet and exceed quotas. I need to turn around bid requests quickly and move on to the next. Mine is a numbers game. There are so many days when I have an appointment on one side of town followed by one on the opposite side, so there's not always time in between to study up. When I wear my business development hat, making office visits with our loyal customers, I need to arrive with answers, either to new inquiries or about jobs completed. If I can't deliver valuable information for these folks, they will find someone else who can. I do a lot of follow-up on jobs sold, not only to make sure we're delivering on promises made, but to highlight the successful outcome of jobs completed.

JOB DETAILS

- When a new bid request comes in, I need every detail:
- Who is the customer?
- Where am I going?
- What is the best way to reach the prospect?
- Have we done work for them before?
- Have we sent them a dozen quotes in the past and never been awarded the job?

These details are vital in setting the tone for a new site visit and whether or not it goes well. If it's someone we've quoted in the past, I review everything offered previously and often save valuable time by highlighting the same services. The customers love it. Shows we're on our game and familiar with their needs, plus, we're not reinventing the wheel.

SALES ACTIVTY

The biggest issue with sales is not understanding expectations:
How much do I need to sell/close?
What makes the company the most money (expected profit margins per bid)?
What happened with previously lost opportunities (was it service related, poor craftsmanship, bid came in too high/too late, or did the people involved change?)

The best sales tool is a strong, convincing portfolio of past work that speaks for itself, building a tone of immediate confidence with customers. Of course, most of the time it's all about the bottom line cost. If we can't stay competitive with material and labor costs, then we might as well hang up our hats.

FOREMAN / SUPERVISER

JEREMY UNDERWOOD

FOREMAN, KINETIC CONSTRUCTION

When sales promises the world, I'm the one who has to deliver, making sure work gets done on-time and on-budget.

I DIRECT CREWS AND KEEP THE SUBCONTRACTORS AND VENDORS IN LINE. Without my presence, little to nothing would be accomplished. Being the face of the company for the property owner, I also get the brunt of all "feedback". Customer service and the office's paperwork demands are two more of my top priorities. It's all made worthwhile when my team delivers beautiful craftsmanship to a satisfied owner/customer. I pride myself on less than 1% per year warranty calls and not change-ordering my customers to death like some other GCs.

PAIN POINTS

- Understanding site access issues/directions
- Managing overtime
- Scheduling crews and subcontractors
- Access to real-time payroll hours
- Dealing with staff/subcontractor turnover
- Paperwork
- Lost time, running from one job to the next
- Surprises (problems) that don't get reported right away
- Customer inquiries require multiple phone calls before informed feedback may be given
- No system to calculate my true costs or profits for a given job.

JEREMY'S GOALS

DAILY EFFICIENCY

Since I work mostly out of my mobile office (my truck), it's hard to keep track of paperwork and receipts. I am not a big tech guy but I'd do almost anything to stop my phone from buzzing. Calls, texts and emails are usually all the same: the office wants to know when we can schedule the next job, field guys are wondering what happens next or telling me they're stuck and can't proceed for some reason, or, my favorite, my manager calls to make sure things are running smoothly. I almost forgot the subcontractors who call to schedule the work they need done and all the vendors who call to coordinate material deliveries. If my phone didn't ding every fifteen minutes, I'd think something was seriously wrong.

SCHEDULE

As the one responsible for controlling job costs, nothing is worse than watching my guys mill around the shop for the first hour of every day, getting organized with the right materials (drinking coffee) before leaving for the job site.

They should know what's on tap before they even punch the clock. They shouldn't need to talk to multiple people to get what they need. Simply getting the right address and knowing there won't be any property access issues would prevent a lot of down time. Coordinating when subs come in to knock out their work presents a whole other challenge. If the rough-in plumbing doesn't get done on time, a ton of phone calls are necessary to rearrange timing for everyone else coming in behind him (drywallers, flooring, painters, etc.). Securing city permits and making sure customer sign-offs are in-hand before we get going can also be a real bear.

JOB ACTIVTY

With any new job, the first thing I want is a full understanding of the scope and of customer expectations. I immediately reference the estimate/quote to review the scope of work and timing. Next, I create a list of materials to order and coordinate delivery for. Then I review any available site photos. I make notes on the required crew and start lining up subcontractors for trades we don't perform in-house. I crunch numbers to create budgets for everything and then the calls begin. Locating the right parts, tracking down any custom stuff. Sometimes we face up to three-week lead times, which is why it's always more cost effective for me to order parts than to trust my sub to do it. My #1 rule is to never trust subs with pricing—and to get everything in writing. Getting everything lined up perfectly then finding out a sub has been pulled to another site or is no longer in compliance is maddening.

FRONTLINE CREW

LOUIS SÁNCHEZ

FIELD TECHNICIAN, KINETIC CONSTRUCTION

I'M IN THE FIELD EVERY DAY, either on one big job lasting several days/weeks or on a handful of sites in a single day, knocking out my work orders.

I have the skills to plan and prepare for each day but often lack the right information.

My experience in my craft got me this job, so getting paperwork kicked back to me because I didn't fill it out right or they can't read my handwriting is frustrating. I get pulled left and right to pick up materials at the last minute or help on a site where we're short staffed, making it even harder to stay organized. I'm happy to do what is asked, but when I'm reprimanded for not getting work orders done, for working overtime or for turning in a receipt incorrectly, I question why no one sees everything else I do get done—and done right—for the company. Seems to me that if someone could get our schedule straight, a lot of problems would be avoided. I'm asked to take a lot of pictures of the work when I leave a site and they pile up in my phone. I show my family how great some of my jobs turn out but I'm never sure if my boss or the owner sees or appreciates the level of detail I put into everything.

PAIN POINTS

- Consistently arriving at job sites unprepared and without the right materials / tools
- Site access/directions
- Knowing how to handle customer inquiries
- Expectations for completion times are unattainable
- Paperwork and consistent inaccuracy/slowness to update
- Knowing where to go next if schedule changes

LOUIS'S GOALS

DAILY EFFICIENCY

I just want the work I'm assigned, done. Because I'm never sure what my day-to-day holds, that is more difficult than it sounds. Even if I could only see what tomorrow looks like, I could plan and prepare better, bringing the right tools and materials to every site. Not to mention, the schedule changes constantly, so, I might be on a site today and get only half of the trim work done, then the company sends someone else out the next day to finish the work I started. That's fine, but when a problem comes up about the quality or it wasn't done to specification, I have to scramble around to determine what happened. I'm on so many different sites that I can't remember all of the details from two weeks ago. When I clock in to start the day, I end up standing around until work order(s) are handed to me and then rush to get to the site. A work order may only be a sheet of paper with an address and the note, "finish painting 2nd bedroom". I do a lot of legwork to track down what I really need to get every job done right. While on the job, I hear a lot from customers about what they expect.

If we could just update job notes for the guy who has to show up the next day, more complaints could be avoided.

The notes I do make? They're on a paper work order which no one else may see for up to a week—I see them pile up on the Foreman's desk.

JOB DETAILS

Work orders include a lot of contact information but I usually highlight only what I need—mostly notes about site access (lockbox, key placement, time we're expected, etc). If I'm meeting someone on site, it's helpful to know whether or not it's been confirmed and who to call if we're running late or stuck in traffic. Our office calls me throughout the day with updates to make note of on my paper work order, but if I'm running the table saw, I can't always hear the phone. Sending a text to update the work order details from the office's side makes more sense. Sometimes job notes only end up in my head, so if I'm not back the next day, I get a bunch of questions from the crew who shows up after me. I know the project manager can't always be there, but it should be their job to keep track of progress details. Just the other day at one of my jobs, a subcontractor showed up to drop off some materials and it took 30 minutes out of my day to get in touch with someone who knew where those materials should go.

SCHEDULE / TIMESHEET

Talking to a project manager to let him know that I'll be at his site is the best way to dig for information that might be missing on a work order. I just had a job where we had to relocate a piano at the end of the day for the painters who were coming the next morning. That wasn't on the work order, but the office found out about it at noon and only told the PM, who didn't get around to telling me until 4:30. It was an 800 pound piano. I couldn't move it myself, plus, I didn't have any moving blankets or dollies, so I had to wait around for an hour before another guy could meet me to get the job done. I get overtime, but I also get yelled at to watch costs. Now I look bad because my work order was supposed to be done in 6 hours and it took me 7.5 hours. I have to be at this site again tomorrow and it happens to be 5 minutes from my house, but I'll have to report in to the office and waste the first 2 hours of my day driving back and forth so I can get the daily paperwork.

DISPATCHER / SCHEDULER

KEELY PALMER

JOB COORDINATOR, KINETIC CONSTRUCTION

MY DAYS FLY BY. I manage the schedule for each department and field incoming calls related to jobs. I set up new jobs (I'm the only one who knows how) and schedule site walks for bid requests. I field so many bits of job-related data from most everyone in the company and anyone outside of the company—I joke that it's all being held together by my hundreds of sticky notes. One minute I may get a call to setup a new job, then a message from a subcontractor that they can't get into a house because of a killer dog, followed by a call from one of our guys' moms concerned because her son left his lunch in the fridge.

It's expected of me to be on top of everything, including the whereabouts of our 80 field guys at any moment.

I live in a world where I'm constantly behind and can't possibly relay all of the messages I'm responsible for on-time. Lunch at my desk is a daily activity. There's always a mile-long checklist that it's easier to do myself rather than trying to teach anyone else who can step in here and there and will probably mess it up, creating more work for me to do.

PAIN POINTS

- It's hard to make necessary changes to the schedule and keep it up-to-date
- Communicating important updates with field staff in a timely manner
- Knowing the location of crews throughout the day
- Keeping everyone updated on all changes
- Having job data readily available when customers call with inquiries

KEELY'S GOALS

DAILY EFFICIENCY

My only wish is for everything to live in one system, whether I need job-related information or need to set up a job in the first place. When I started I was given a checklist, outlining the 19 steps required to a set up a new job and after working here for nearly a year, I still refer to this list to make sure I haven't forgotten any one of the steps. It can take me 15-20 minutes or more just to create and setup a new job and a lot of it is spent entering duplicate information into different systems.

At day's end, when work orders come back from the field, there's a series of steps just to document that day's production progress.

I guess this is why people just end up calling me with their questions - trying to figure out which system to go to for an answer is frustrating. I guess it means job security for me!

JOB INTAKE

I keep a spiral notebook by my side all day, so when the phone rings I have a spot to jot down caller notes. I record it here first because there is no way I can tell a caller to please hold while I pull up the various programs I need to record their data, plus I have something to refer to when I start setting up a new job. I've made a cheat sheet just to make sure I am covering all of the questions I need to ask a new caller when a job comes in (primary contact, how they heard about us, if they have a coupon, if billing address is same as site address, if an HOA is involved, etc.).

After getting yelled at by one of our repeat customers for having to repeat information we should already have on file, now I try to see if the caller is a repeat customer first, but doing this while frantically scribbling down what they have to say about the work they want done can be challenging.

I often have to research properties online just to cover other things the guys in the field or Accounting will need. A biggie is a legal property records search at various county registrar's offices (last year we lost $20K on a job at a house that was actually going through foreclosure). Plus we need to verify the year the property was built for stuff like LBP (lead based paint) and asbestos-related issues. The guys love it if I attach an aerial photo from Google maps to show how many stories a building is and what the parking situation is/where access points for deliveries are. With everyone having smart phones, now callers want to send me photos of their site and I print them to attach to job folders.

SCHEDULE

Our scheduling system is not great. I've tried creating different Google calendars so that when people are in the field, they can access them from their phones, but no one does it. So it's back to our whiteboards. We have a separate whiteboard for each department and we use a color-coded system so the guys can see if a job has to happen at a certain date/time because we are meeting someone or if it's somewhat flexible because it's a contract-type job for maintenance. An asterisk gets added next to a job if it's a "problem" job, which then the Department Manager, Operations Manager and Sales Manager track. If it's a high-dollar job or a job with the State, those usually get priority when scheduling to make sure we get repeat business or good reviews. All insurance (Program Jobs) get a special notation because Time-to- Completion reporting comes into play and if we don't report well, we can get removed as a preferred service provider. In addition to listing assigned crews to the job whiteboard, we also try our best to track scheduled subcontractors. We add a checkmark to jobs if the materials have been delivered to a site, etc. If there were such a thing as a virtual whiteboard so the guys in the field could see the schedule remotely, it would cut down on a bunch of my incoming phone calls. If, if, if.

PARTNERS & SUBS

YOURI DOLGORUKI

OWNER, 123 LOCK & KEY

MY SON AND I RUN OUR SMALL BUSINESS FROM HOME and don't have a receptionist or fancy answering service. You call the business, you talk to me. We stay very busy helping a few big contractors and apartment buildings we've worked with for years. Because of our size, we truly can't afford wasted trips all over town. It's happening more and more that we get calls to rekey locks then can't get into the building or the job isn't ready for us because the doors aren't even hung. I want to charge for these wasted trips but worry that if I do, the phone will stop ringing. I don't have the resources (extra money, time or the know-how) to market my services to a bunch of new customers.

PAIN POINTS

- Misunderstanding job timing and scope
- Adherence to customers' performance expectations
- Staying on top of paperwork, including submitting quotes for work and invoicing for work performed
- Site access and knowing the right contact to call with questions
- Delayed approvals/authorizations to proceed when project scope changes
- No system to calculate my true costs or profits for a given job.

YOURI'S GOALS

DAILY EFFICIENCY

It would really save time if we could track incoming requests without stopping work to check email or answer the phone, accept requests without a lot of hassle, then turn right around and bill for services on the spot.

We use paper invoices that I buy from the office supply store and this gives me every form in triplicate, so I just hand a copy to the person on the site. Now one of the big GCs I've worked with for years is saying I need to get a real invoice system—I guess they don't like the fact that I just write in invoice numbers. Sometimes I use the same number and it gets the accounting ladies all worked up.

JOB REQUESTS

I don't do work outside of the metro area and field so many calls just to let people know this. I will do some big work, but not always. You would think if I don't return a call asking for a quote on a big project, they would get the hint, but these managers call again and again just for me to say no. Then there are the people who don't know what they want. They tell me one kind of lock or door, I show up and nothing is as they said. My son now asks for a picture. Smart. I can take a look at model numbers beforehand and come prepared.

SITE DETAILS

If I'm called to do a job, I go there, ready to work. Nowadays, I usually call to make sure the job is ready for me.

Sometimes the locks I need to get at are in some sub basement that a manager has to let me into—this is information that should be explained when the work is agreed upon but rarely is.

Sometimes there are other workers at an address and no one in charge. I have to look through my notes to find the right person to call just to find out where to send the bill. There are so many people to keep track of—even for the simplest of jobs.

CLOVER SHARPE

HOA COMMUNITY MANAGER, MILE HIGH MANAGEMENT

I AM OVERWORKED. The 12 communities I manage average 350 units each—that means 4,000 individual property owners I may have to answer to at any moment. Each community also holds a monthly Board Meeting at night, which lasts at least two hours (if I'm lucky). These meetings can get very heated, in fact, my life was threatened once when I served a property owner with a foreclosure notice after they kept ignoring violation notices. My biggest responsibility is managing the upkeep for each community and the corresponding budget(s), allowing for the preservation of property values based on a set of bylaws or shared values for how a everything should be aesthetically sustained. I depend heavily on our approved contractors and on-site staff to perform property maintenance and repair work.

PAIN POINTS

- Dealing with unorganized contractors - erratic scheduling, receiving timely paperwork & proof of services
- Getting updates on start/completion dates & resolution to issues that arise
- Access to qualified contractors
- Obtaining responses to bid requests for projects which require minimum number of bids for HOA Board approval
- Tracking all of the communications between my office, homeowners & contractors
- Multiple sofware platforms to pull monthly reporting from

CLOVER'S GOALS

DAILY EFFICIENCY

I'm responsible for engaging any and all vendors who work within community common areas. The HOA dues paid by homeowners are collected and allocated toward annual property maintenance costs and I hire and pay out these costs, reporting all activity to the HOA Board monthly. Cash flow projections affect different budgeted line items—Building Maintenance, Property Maintenance, Street/Sidewalks/Parking, Snow Removal, Lawncare/Landscape, Pool Maintenance, etc., so having the right answers to report on site work is a must.

Not only am I ensuring that the annual contract we have with a landscaper is meeting the needs of a community, but I'm frequently soliciting bids for capital improvements (like asphalt repair) to get the best value for my residents.

JOB ACTIVITY

I report on all work at individual sites, meaning if 4 out of 12 buildings (each building with 8 condos) gets hit with hail damage, I report on the number of affected homeowners, proposed bids by roofers and associated cost burden to the community. I then plan out communication updates with property owners throughout the repairs. Quality of work has to be stellar. My reputation and my management company's reputation is on the line to maximize each community's budget and ensure we employ professional contractors.

If a project goes poorly, the likelihood that a community will renew its contract with us goes out the window.

CONTRACTOR MAINTENANCE

My strength is in managing costs, in fact, I got into this work because of my accounting background and experience.

I don't know the first thing about construction so I rely on the relationships my company has built with trusted contractors.

They become my eyes and ears on a site and the good ones make my life easier by reporting not only their own progress, which I use to assemble my monthly Board meeting packets, but by reporting on other work that may need attention. When a homeowner calls to point out that the fencing to a trash enclosure has fallen, it's always good to report that I already have someone dispatched for the repair. This is a typical repair and the ability to get bids by reputable companies back quickly for Board approval is huge (jobs over $500 require Board approval).

MANUFACTURER - OWENS CORNING ROOFING

BILL GOODMAN

VP OF MARKETING AND CONTRACTOR PROGRAMS

OWENS CORNING IS THE LARGEST ROOFING SHINGLE MANUFACTURER IN NORTH AMERICA. We serve the residential and commercial markets through the largest selection of steep and low slope product offerings. We distribute through marquee distributor partners such as Beacon and ABC as well as thousands of local and regional distributors and "supply houses."

I oversee the marketing function which is largely focused on consumer and trade with most of my time dedicated to the latter because the roofing contractors and distributors are the ones pushing our brand. I also oversee our customer (roofer) loyalty program. This is where a majority of the "marketing" in our business happens. We built this loyalty program to strengthen our direct relationships with roofers so we wouldn't have to rely 100% on distributors to build our brand. The program has been so successful that we negotiate discounts or preferred pricing and introduce those vendors to only our best roofers: the guys installing >50% of their projects with our brand. If they're exclusive with us, we have an even higher level status for those guys. We even boost marketing for loyal contractors by bolstering their warranty coverage.

PAIN POINTS

- We have a pretty good track record of forecasting sales each year but we have several inputs – macroeconomic data, industry and trade forecasts, etc. But, if we can get an aggregate view into actual estimates and bids happening in the field, we can use that data to better plan and coordinate with our manufacturing function and our distribution channels.

BILL'S GOALS

SELL MORE PRODUCT

The punchline is that I want to sell more product and I want to do it through new relationships or by growing existing ones. These roofers are all over the place and if we can offer them something that helps their business while seeing incremental product pull-through sales (vs push-through with my ~300 outside reps), then I want to exploit that. I want to know how I can leverage a platform to accomplish these goals.

I'd love to see what product is getting pitched, sold, installed and replaced. Especially if it's my brand. If that's only the roofers that are in my program, that's fine, but I really want an entire market view. And, I'd be willing to pay for it.

I want to know who my most loyal customers are without asking them and without waiting until the end of each quarter or year to review their financials.

I want to know because I want to see how I can train others on best practices of leading roofing companies.

I want to proactively inject my brand into the end-customer consideration / buying process. I want to build awareness earlier and create as much pull-through as possible. The less that I have to push and the more that I can market, I know I'm being efficient. Plus, I can shift my costs a little to be more variable costs.

I need to grow market share and increase pull-through.

I want a technology vendor to add to my program. We don't collect a revenue share but if we approve a vendor to recommend to our network, I want to see 100% commitment.

I welcome a way to get my materials details into a system that my roofers are using to make it easy. And I want to market that to new roofers that I'm not currently working with.

FRANCHISOR - CERTA PRO PAINTERS

SOLOMON POTTER

VP OF OPERATIONS

I STARTED WITH CERTAPRO 20 YEARS AGO AS A FRANCHISEE. I was tired of climbing the ladder in "Corporate America" and wanted to own my own business. I pulled together a $60k investment to buy a franchise. I was unique among my franchisee peers because I brought my expertise and experience from the corporate world, specifically, how to build a process and put solid teams around it. And I wasn't afraid to go on sales meetings to pitch my company and bid jobs.

As VP of Ops, I put in place training around many of the successful, tactical processes that I used with my own local office. I would then build a blueprint for all franchisees to follow. We'd build intensive new-franchisee training programs, continuing education modules for our regional managers to use with franchisees in their area, and wrapped reporting and metrics (as much as we could) around every aspect of how a franchisee operates.

I believe in dashboards and KPIs and know that our Lotus Notes and Fran-Net platforms provide a basic view into how our franchisees are doing and ultimately how our brand is doing overall. We need to modernize how we're doing things especially if we're going to be competitive in the growing, high-margin commercial business (currently 40% vs 60% residential) and I want more data.

PAIN POINTS

- Implementing anything in a franchise model is a nightmare. It will take testing, piloting, and slow rollouts. Anything that we are even remotely interested in must feel like it's been built for franchisees in mind and tailored to our business.
- Visibility into anything going on in the field is challenging. A way to summarize that data and provide executive level insights is a must have.
- Forecasting revenue and royalties.
- Consolidating our customer data so that marketing can use it in their planning.

SOLOMON'S GOALS

MODERNIZE

I want a tool that helps attract stellar owner candidates. Our technology should differentiate us from the other competitor brands that are fighting for franchisee owners—after all, franchisee growth fuels brand growth and brand growth fuels sales.

I want a tool that helps franchisees streamline all of the process stuff in their office while providing the corporate office with global visibility.

I want to know what our local franchisee's pipeline looks like. I need to forecast royalties and that means I need to accurately see past, present, and forecasted revenue on a longitudinal basis.

A franchisor's dream is to have royalties funding every penny of the corporate offices operations. If we're charging 8% to a franchisee, I need to see every penny of that and where it sits in their pipeline. 40% of that goes to fueling marketing and the rest goes to the G&A budget.

We've had massive growth in the commercial space over the years and I want to give that part of our business a boost.

I want to see average tickets by job type. At the national level, regional, and by franchisee if needed. Drilling down isn't something that I will always do but it's critical for my team and my regional managers.

DISTRIBUTOR - BEACON ROOFING SUPPLY CO

BOB WORLEY

VP OF MARKETING, BUSINESS DEVELOPMENT

BEACON IS A $5B PUBLICY-TRADED, NATIONAL DISTRIBUTOR with ~400 locations in the U.S. and Canada. We distribute roofing and exterior replacement products for commercial and residential applications and represent the best brands in the those industries.

I've been in the role for a couple years and am fairly new to this industry, although I'm no stranger to supply chains, supplier-buyer dynamics, and how suppliers and distributors work. I've been brought in to help craft the customer (contractors) strategy. That is a combination of channel marketing programs, revamping our sales process, and formalizing and expanding our preferred customer experience—that's where I want to start including value-added vendors that help our customers run a better business. I want to increase affinity to our local brands and locations, and strategically incorporate our role in their daily businesses (vs picking up the phone to call us when they need pricing or are planning for a project).

We have extremely close relationships with our contractor customers which is one of the reasons that I think we can play a critical role in pushing programs and solutions that have mutual value and drive more sales to our supply houses.

PAIN POINTS

- We have a pretty good track record of forecasting sales each year but we have several inputs—macroeconomic data, industry and trade forecasts, etc. But, if we can get an aggregate view into actual estimates and bids happening in the field, we can use that data to better plan and coordinate with our suppliers.

BOB'S GOALS

MARKET VIEW

I'd love to see what product is getting pitched, sold, installed and replaced. Especially if it's in my brand portfolio. If that's only the roofers that buy from us, that's fine, but I really want an entire market view. And, I'd be willing to pay for it because market data that provides a thorough pipeline provides me with valuable data to use in inventory management and supplier orders.

If I recommend a contractor to use a quoting or project management system, I want to get my SKUs pre-loaded into their system to make it easy to pre-sell brands and products that we carry. And I want to keep other distributors out.

I want to know who my most loyal customers are without asking them and without waiting until the end of each quarter or year to review their financials. I want to know because I want to see how I can train others on best practices of leading roofing companies.

We deliver product to most job sites. It's a way to help our customers stay focused on that new roof or re-roof project. I want to know ahead of time when if we need to have product available and where we need to take it—all before a customer calls us with a P.O.

We're pretty good at not over-stocking but if I have inventory that I need to liquidate, it would be nice to have an easy way to do that.

HOMEOWNER

RALPH STEADMAN

HOMEOWNER, MEADOW HILLS HOA

I'VE LIVED IN MEADOW HILLS FOR 20 YEARS. As a retiree, the $1,800 I pay in annual HOA fees is sizable. The Management Company sure is quick to send me a violation notice if my trash cans are out a day too early but the broken sprinkler head I reported two weeks ago still hasn't been repaired. Now they've got trucks coming in and out of here at all hours of the day, taking up all the good parking spaces at the pool. How long can this last?

PAIN POINTS

- Communicating about and reporting property issues
- Getting timely updates on problems reported along with status reports for long-term projects that go on in the HOA community

RALPH'S GOALS

DAILY EFFICIENCY

Trying to reach anyone at the management office who knows anything about my community is nearly impossible.

All I can ever do is leave a message after navigating tons of options over the phone. If I'm lucky, I'll get a call back from some assistant two days later, thanking me for my inquiry. If I ask a question about when something will get done, I get another thank you for my inquiry and another call back two days later. All I want is to know what is going on in my neighborhood, acknowledgement when I have something to report and an update when it's completed.

REQUESTS

Seems like snapping a photo and sending that along with a description of the problem to the management company would be a more efficient way to make a request. Then I wouldn't have to go through the rigamarole of spelling my last name and giving out my home address over the phone for the hundredth time. Beats me why they don't save me in their system. I'd rather just get something like a text or a simple app to track what is happening with my property.

UPDATES

Last year when the condo above mine leaked into my kitchen it took days before someone finally told me that the damage to the inside of my unit was not covered by the HOA. I had to file a claim with my insurance and by that time, mold had developed. Again, if there was a simpler way to communicate, I'd like to believe someone would have notified me sooner.

INSURANCE ADJUSTER

BRYAN DEAN

PROPERTY CLAIMS ADJUSTER

AS A FORMER BUILDER, understanding how to repair structures is second nature. I prefer contractors who understand what will and won't be covered by the carrier, that way I can trust their estimates. It saves me the time of having to write my own for a new property loss. We all use the same estimating program, recognized nationally by most of the big insurance companies, but there are always contractors who try to slip in "extras" to pad costs.

I may be handling upwards of 200 active claims at any given time, so my time is tight.

My goal is to visit sites once and to meet with the homeowners to learn exactly how the loss occurred and discuss the affected areas of the property. The last thing I have time for is working through an insured's complaint that the contractor we recommended is not doing the job right.

PAIN POINTS

- Receiving timely project updates
- Getting in bids/quotes for work that require a lot of negotiation due to contractors misunderstanding coverage limitations
- Managing paperwork with my heavy claim load
- Tracking down contractors for answers to questions that arise
- Having to travel back to a property to review work performed when issues arise

BRYAN'S GOALS

DAILY EFFICIENCY

My best contractors know how we work. We are not going to pay extra for masking off an area just to paint. We are not going to pay for more than 3 days of equipment dry time. I keep a list of contractors who try to debate me on these points, just to blacklist them from claims I'm on. My job is to keep repair costs to a minimum—period. I show up to a new loss, confirm the property was damaged the way the property owner is reporting, document (take lots of photos), then if I have to, write up a loss estimate so that the higher ups know the anticipated pay out. I need to turn 'em and burn 'em. Open files that sit around unfinished eat up a couple days of office time every month for follow-up calls.

ESTIMATE APPROVALS

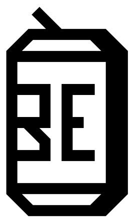
If a job has not yet been assigned to one of our network partners or if the insured gets a wild hair and decides to shop around for an out-of-network contractor, I set an appointment with the owner to walk the site and write up an estimate for repairs. That estimate becomes the baseline figure to be paid out for damages, in the homeowner's and mortgage company's name. Once a contractor secures the job, they'll write their own estimate. I compare this with mine and negotiate a final agreed upon figure, in line with industry standards and guidelines set forth by my company. Once this figure is established, work begins and I submit for the payout. It's quite a process.

JOB STATUS

The only real update I look for from my cases is the completion date so I can release any final funds and close out the file (turn 'em, burn 'em). Surveys are big now and we're encouraged to aim for positive feedback on every claim. This is closely related, right or wrong, to how the job turned out.

If one of our preferred contractors is on-site, they know how important completion photos are as well as a sign-off by the insured.

We require our contractors provide a warranty—typically one year for repairs and up to ten years for roof replacements. This way, should any questions arise from the homeowner, the contractor is the first point of contact for follow-up.



BEER TIME.

Phew. You just learned a lot—congratulations. And, we think you deserve a reward for reading this far, so, crack one open, go for a run, pat your head while you rub your belly too—do what you feel.

And when it's time to do Useful, we hope you feel armed and ready. Any and all feedback is welcome. Consider this guide a living, breathing thing. We're all learning more and more as we grow, and you're part of that. See something thatshould be added? Bring it. Taken away? Let's talk.

Cheers.

Being **Us**eful.