

Why Custom Software is the Smartest Move



When you rent software ... you forfeit a lot more than the monthly fee



Here's what's really happening....

You Think You're Getting

Easy-to-use
software

Amazing
features

A price that is almost
too good to be true

But You're Actually Giving Up

Valuable
customer data

Internal pricing
strategies

Your competitive
advantage



Time is money. And in today's world, data is just every bit as valuable as time. When you use it in the right way, data can lead to actionable insights, improvements in operations, and an increase in revenue.

If you run a SaaS business, collecting data and monetizing it can benefit your business internally by improving your operations and externally, by helping you earn extra revenue from your customers.

Don't know how to get started? Let's help you out.



What is data monetization?

Data monetization is a process where a company uses the data they generated themselves to attain some financial gain. If a company is already data driven and collects vast amounts of data sets, turning it into revenue is a logical next step.

Note that monetization does not have to entail *selling*. You could also use the data you generate internally to improve your systems and create a competitive advantage for your business.

Why monetize your data

← → ⌂ spglobal.com/market-intelligence/en/news-insights/research/a-private-equity-firm-leverages-technology-to-optimize-data-management-... ☆

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CASE STUDY — 17 MAR, 2023

Private Equity Firms Leverage Technology to Optimize Data Management and Analysis

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Theme

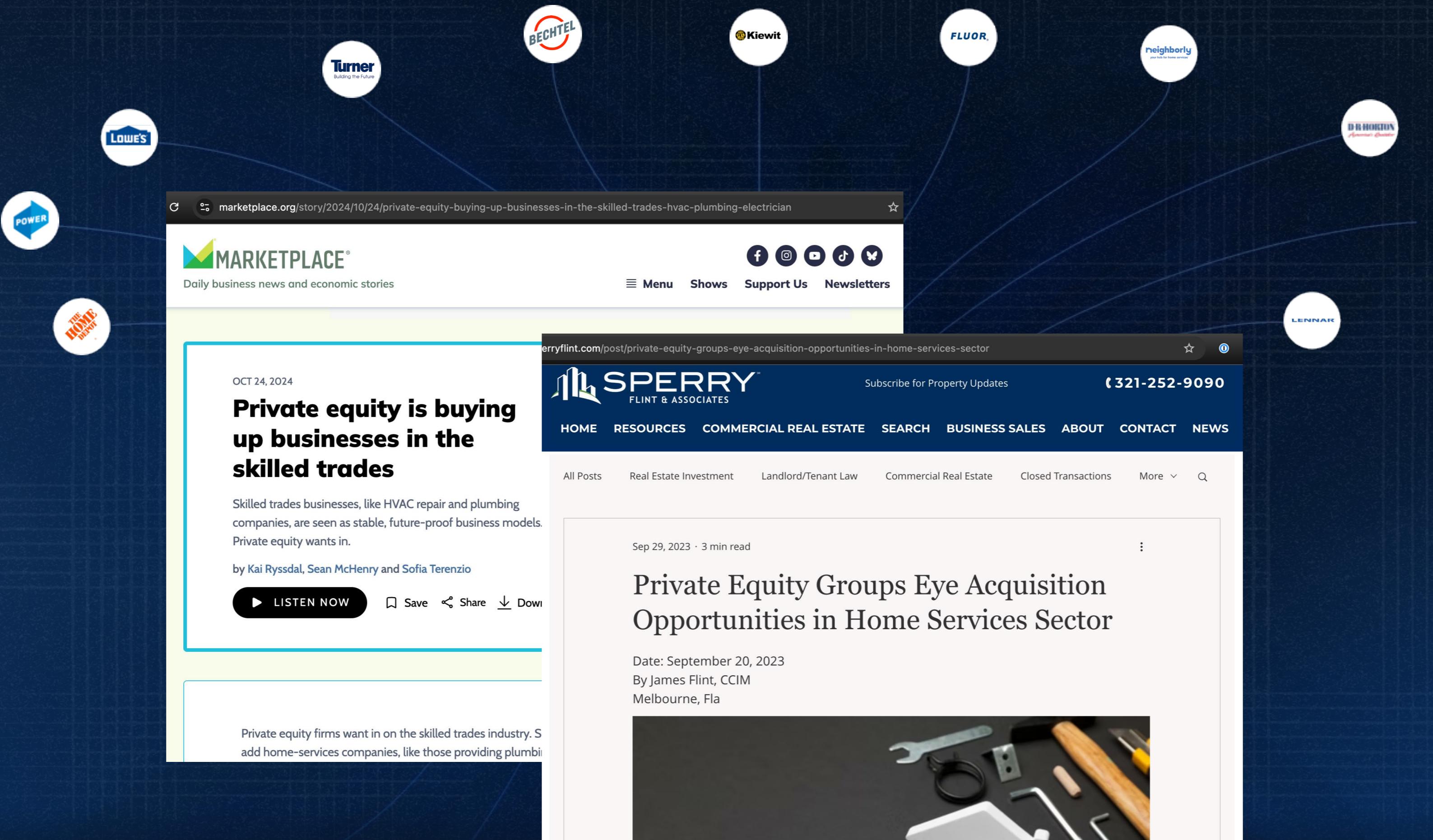
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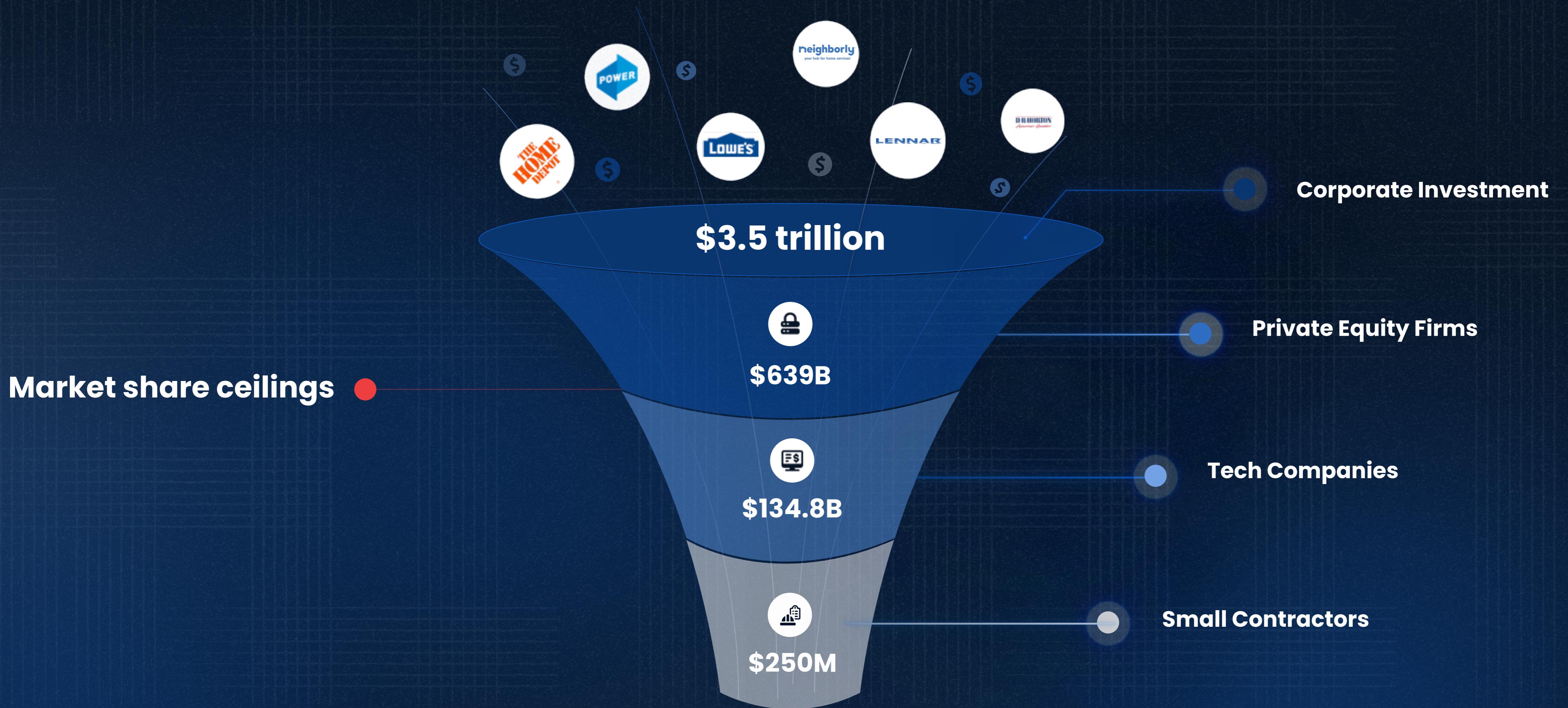
According to a survey by S&P Global Market Intelligence, PE has reached a new stage of maturity with the sharpened aim of leveraging data and technology to create an edge in deal sourcing and due diligence. The findings showed that PE firms are set to explore insights from a broader range of data sources, as private asset data opens a larger universe of information from which to identify opportunities. They are also looking to use technology to make sense of increasingly unstructured datasets that were previously inaccessible.

This research on PE firms was carried out in the second quarter of 2023.

They don't just want your data... They want your customers



Corporate expansion through PE deals



The tech you use is giving leverage to large competitors

Data Collection

Aggregated Data Analysis

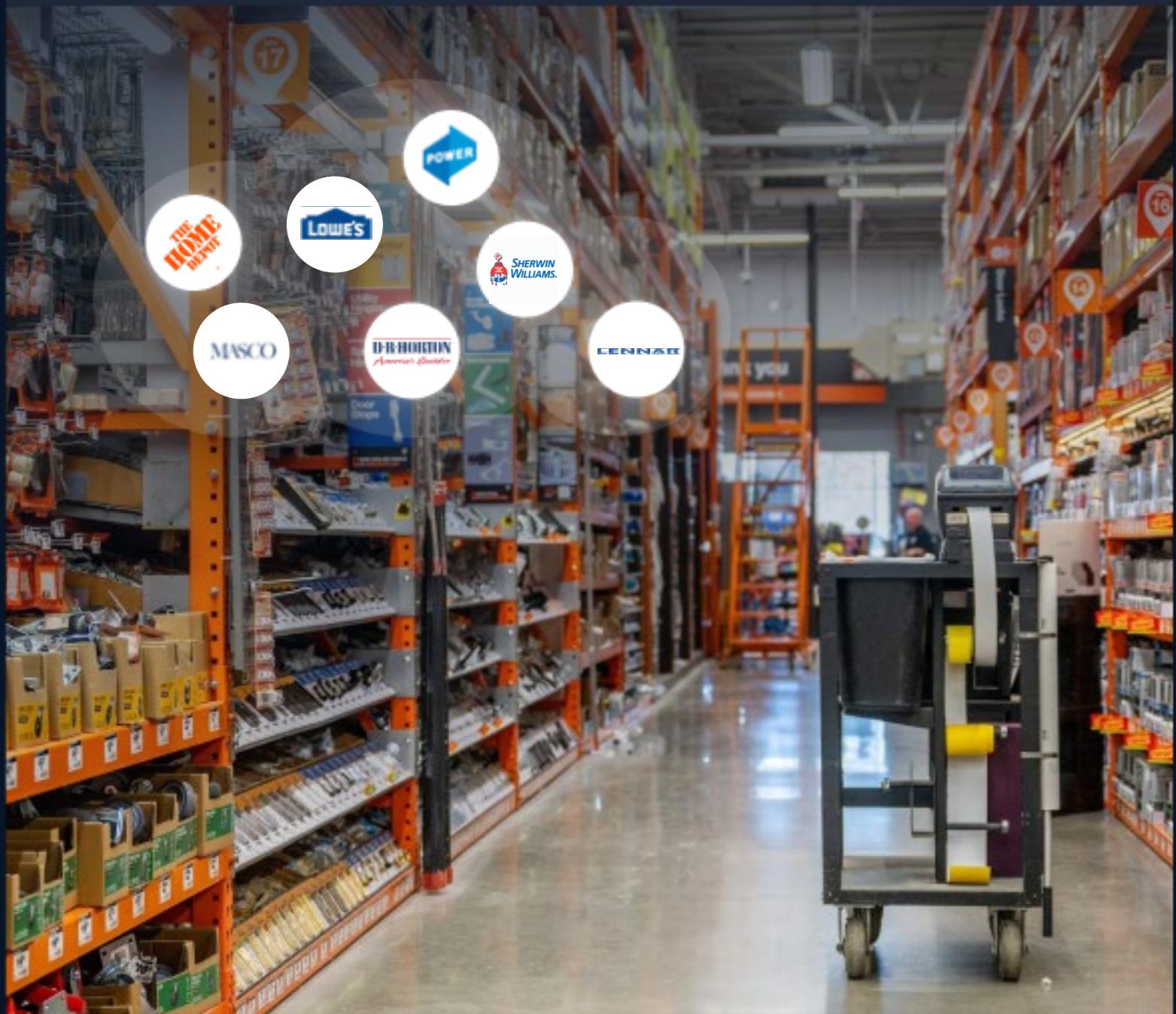
Private Equity Investments

Data Sharing with Portfolio

Corporate Leverage

The Best Companies Don't Buy Subscriptions

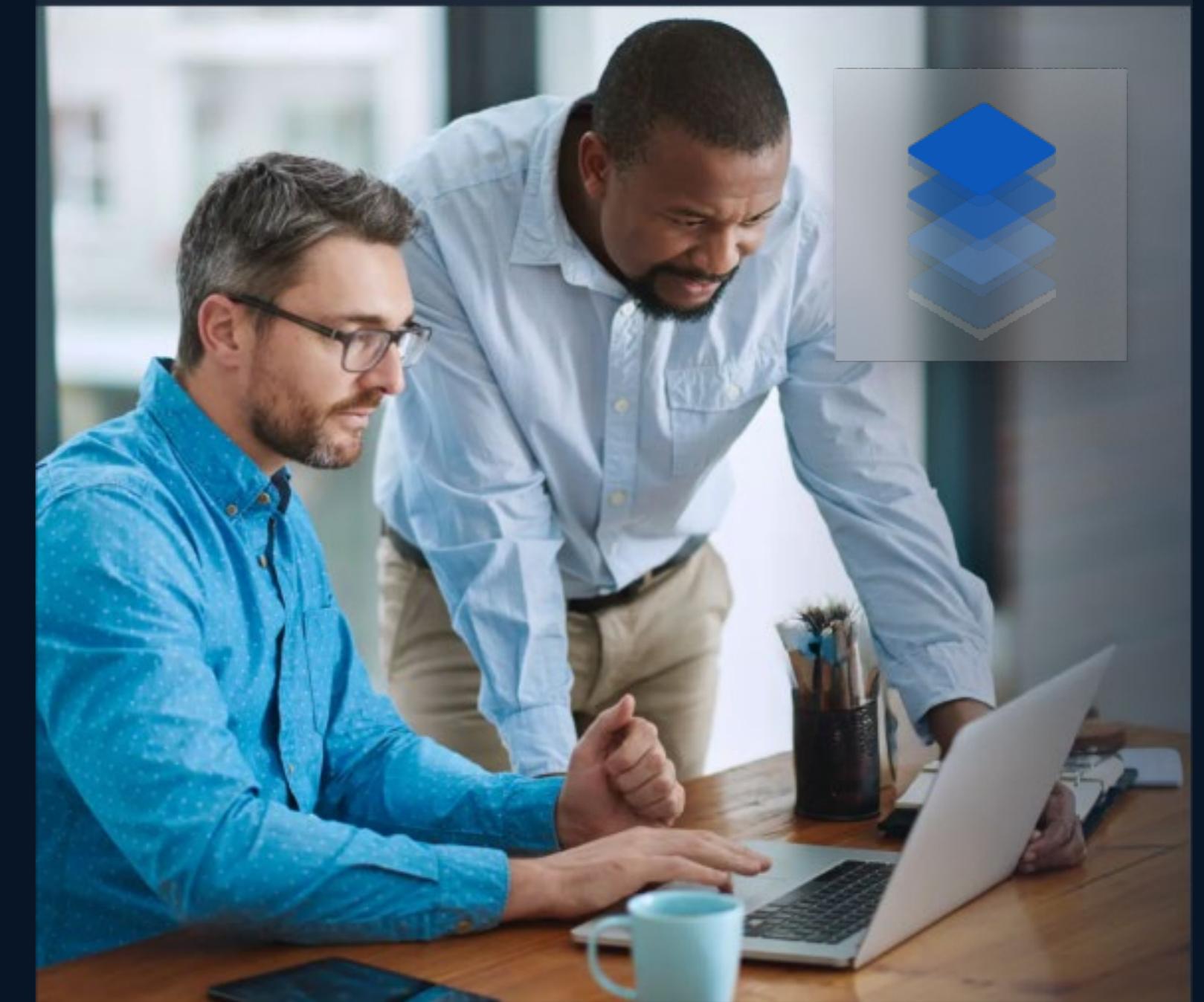
They build software to grow enterprise value



They want total control of their data



They use tech as a competitive advantage



A Proprietary System

Higher Valuation

Stronger Margins

Total Control

ProBuild

Dashboard

Welcome back, John. Here's what's happening with your business today.

Total Revenue \$139,500 ▲ 12.3%

Active Projects 3 ▲ 5.2%

Total Customers 5 ▲ 8.1%

Avg. Project Time 48 days ▼ 3.2%

Revenue Overview Last 6... Current month

Project Status

● Completed ● Planning ● In progress ● On hold

Recent Projects

PROJECT	CUSTOMER	STATUS	PROGRESS	VALUE
F Flooring Installation 123 Oak Street, Springfield	Sarah Johnson	Completed	100%	\$8,500
D Deck Construction 789 Maple Drive, Naperville	Emily Rodriguez	Planning	15%	\$12,000

Recent Activity

- ✓ Kitchen Remodel project reached 65% completion Just now
- 👤 New customer Lisa Anderson added to the system 2h ago
- 📄 Invoice sent to Michael Chen for 4h ago

← → C

growjo.com/company/Housecall_Pro



Search by company name...

Add CompanyOverviewRevenue & ValuationCompetitorsWhat Is Housecall Pro?Employee Data

Housecall Pro Revenue and Competitors

License our Company Data API

Estimated Revenue & Valuation

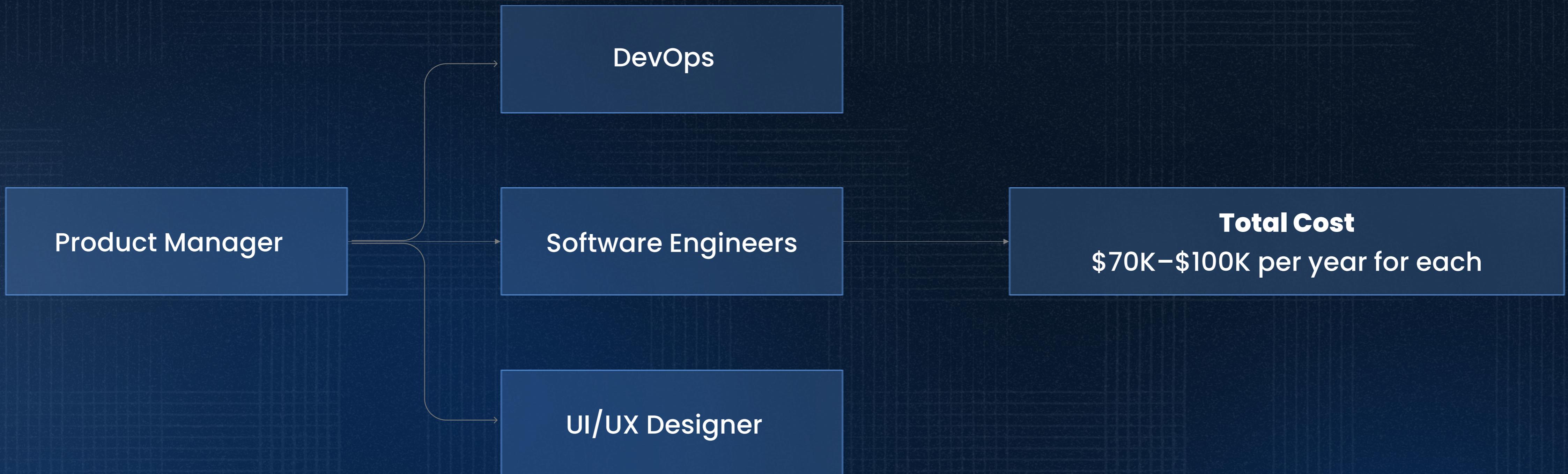
- Housecall Pro's estimated annual revenue is currently \$201.2M per year. (i)
- Housecall Pro's estimated revenue per employee is \$200,200
- Housecall Pro's total funding is \$50M.
- Housecall Pro's pricing is \$588 per year.



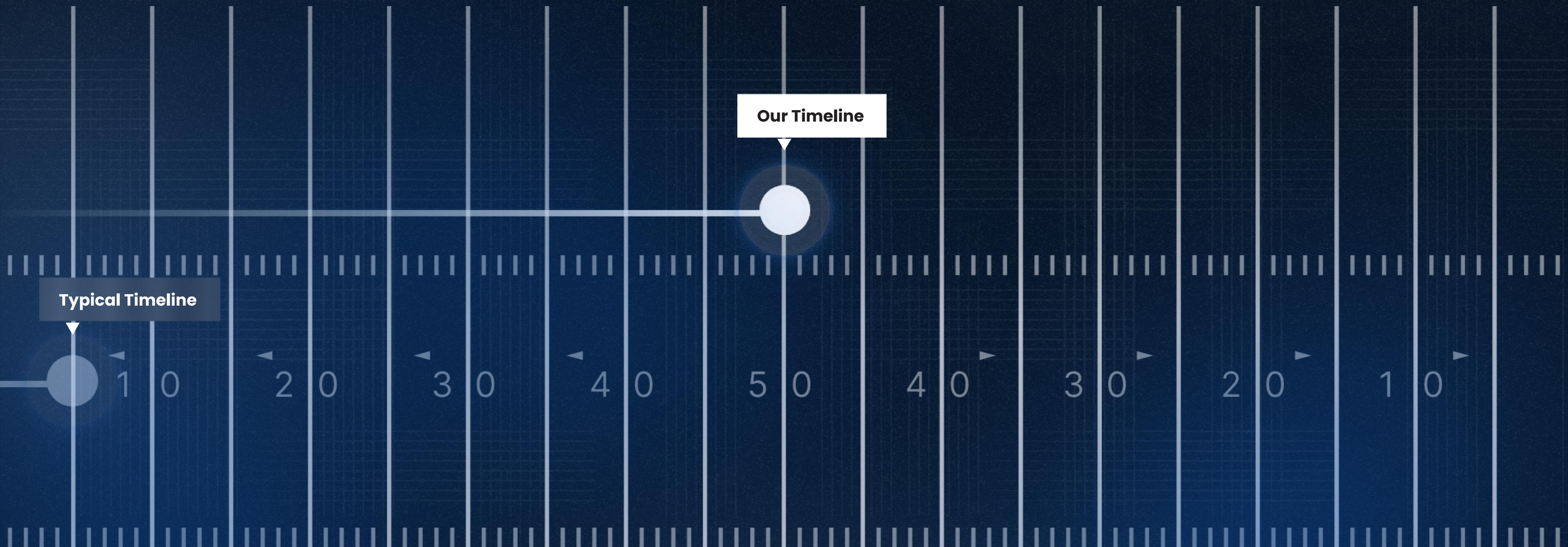
Employee Data

- Housecall Pro has 1005 Employees. (i)
- Housecall Pro grew their employee count by 27% last year.

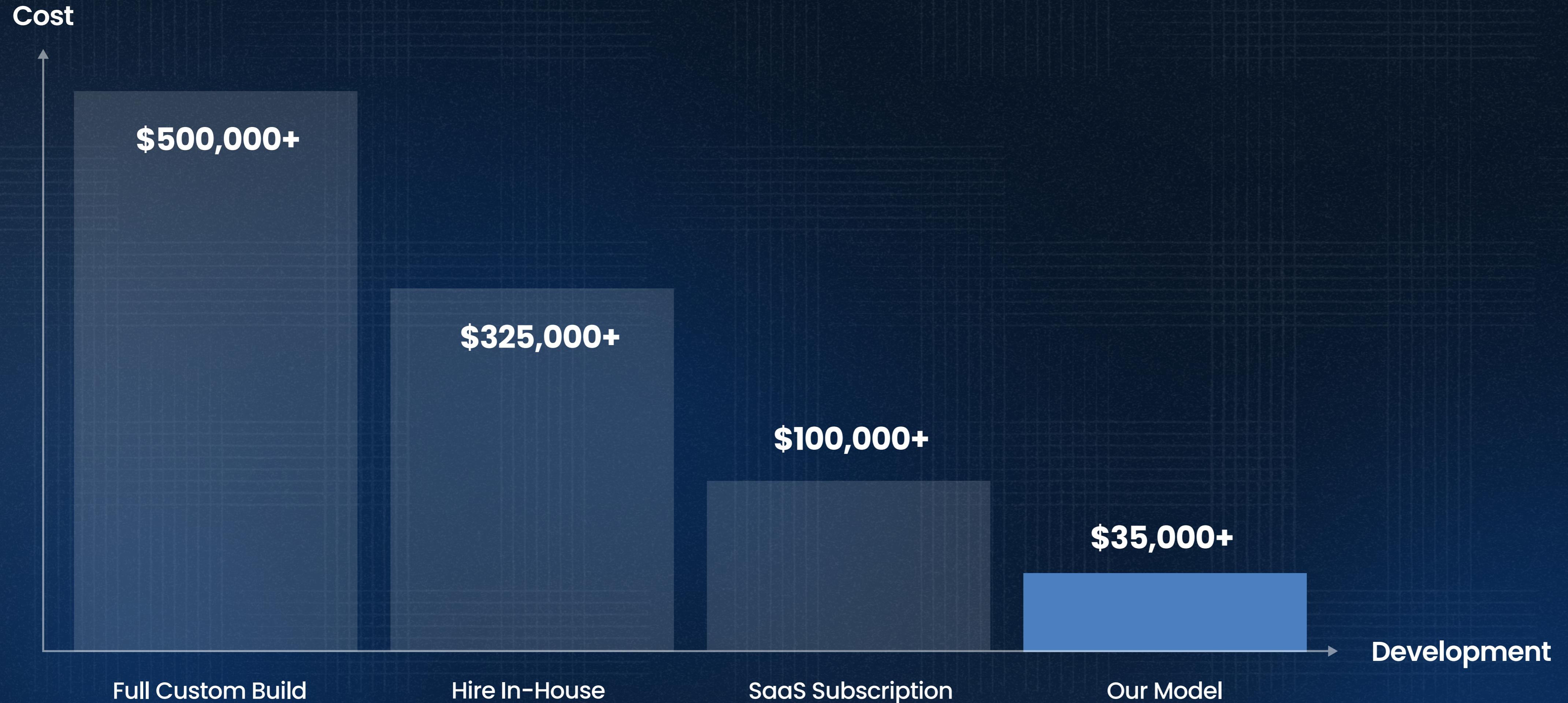
Here's What You Will Need



What if you could start at the 50-yard line?



Cost Comparison of Development Models



You get the keys. You control the data.



**Hosted on your own
dedicated server**



**Connected to your own
private database**



**Fully customized to
your exact workflows**

The Software Development Process

1

Discovery

We learn your technical requirements



2

Design

We map out screens and workflows



3

Build

We develop and demo features



4

Test

We fix bugs and fine-tune performance



5

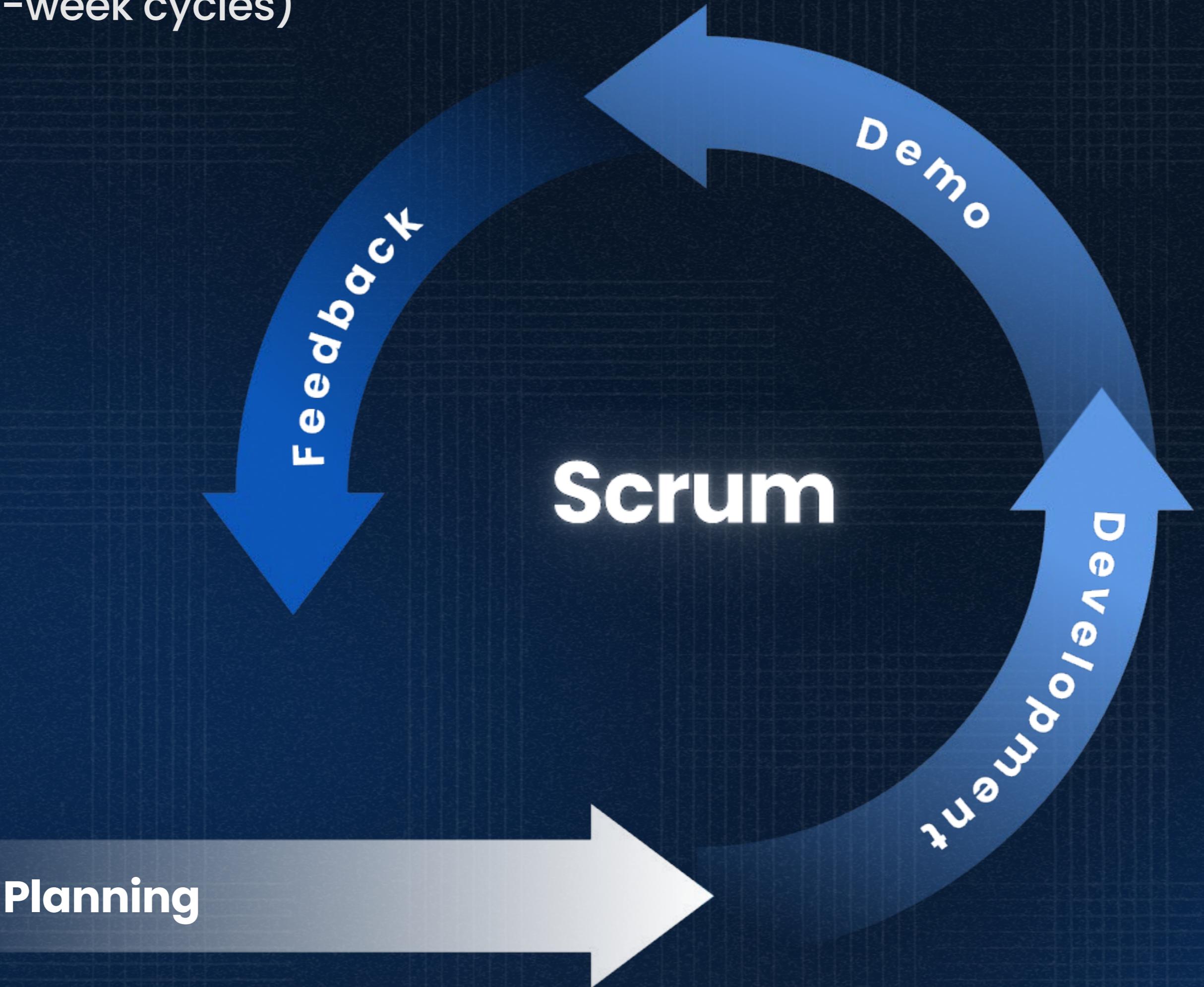
Launch

We deploy it on a dedicated cloud server



What Is Agile Scrum?

Agile scrum is a lightweight framework for building software collaboratively
Work is delivered in sprints (2-week cycles)



We keep a backlog of tasks and ideas. You'll get regular updates and chances to give input

Who's Who



Pete Helms

Product Manager



Alemar Osorio

Tech Lead + DevOps



Muhammad Talha

Software Engineer



Wasi Ahmad

QA Engineer



Mai Vu Ngoc

UI/UX Designer

Any Questions?

MASTER SERVICES AGREEMENT (MSA)

Between _____ (Client) and Ideal Solutions Consulting LLC (Consultant).

AGREEMENT TERMS:

1. Consultant will provide custom software development, technical consulting, product design, and related services as described in the attached Statement of Work (SOW). Each SOW forms an integral part of this Agreement and will define the specific scope, deliverables, timelines, and fees for individual projects.
2. Payment terms are outlined in each applicable SOW. All invoices are due within fifteen (15) days of issue unless otherwise stated. Late payments may incur interest at a rate of 1.5% per month or the highest rate permitted by law, whichever is lower.
3. Consultant warrants that all services will be performed in a professional and workmanlike manner consistent with industry standards. Consultant makes no other warranties, express or implied. In no event shall Consultant be liable for any indirect, incidental, or consequential damages. Consultant's total liability under this Agreement shall not exceed the total fees paid by Client for the applicable SOW giving rise to the claim.
4. Consultant retains all rights, title, and interest in and to any proprietary frameworks, tools, libraries, templates, or modules developed or used in the course of providing services. This includes but is not limited to backend architecture, internal logic, user-interface components, and custom development systems. Client is granted a non-exclusive, perpetual, worldwide license to use the final deliverables for its internal business purposes, including modification and deployment within its organization. Client may not sell, resell, sublicense, or reverse-engineer Consultant's proprietary technology without express written permission.
5. Both parties agree to treat all confidential information received in connection with this Agreement as strictly confidential. Neither party will disclose or use any confidential information for any purpose outside the scope of this Agreement without prior written consent from the disclosing party. This

STATEMENT OF WORK

Project Title: Custom Business Management System

Client:

Consultant:

This Statement of Work is governed by the Master Services Agreement signed on _____.

1. **Project Overview:** This project involves delivering a fully customized deployment of our proprietary business management system, optimized for the Client. The Consultant will clone and provision a dedicated instance of the platform for the Client, hosted in a secure, isolated cloud environment. From there, the Consultant will configure the database, extend the application with client-specific features and integrations, and onboard Client with training sessions.

The goal is to give the Client a cost-effective, scalable, and fully tailored solution to manage operations, reduce administrative overhead, and increase jobsite-to-office visibility.

2. Project Scope

Phase 1 – Base Platform Deployment + Dedicated Infrastructure

- Clone of our proprietary business management system
- Setup dedicated cloud hosting setup
- Deployment of backend services and frontend interface
- Configuration of an object-oriented database with secure access
- White-labeled setup

Phase 2 – Custom Feature Development

- Collection of client-specific feature requirements
- Bespoke UI/UX consultation and design
- Iterative development and testing of custom modules
- Integration with up to 3 third-party tools (contingent on open API docs)