

# Competitive Deal Kit

## RelayFSM vs. the field service software shortlist

A fictional client scenario built from current official competitor sources. Designed to show what a paid, deal-specific engagement looks like in practice.

FICTIONAL

### Briar Ridge Home Services

Residential HVAC and plumbing

USERS 12 field / 3 office

TRIGGER Second branch in 9 months

DECISION Within 21 days

CHAMPION Controller

PRIMARY RISK Migration and adoption

#### EVIDENCE KEY

VERIFIED

CALCULATED

INFERENCE

FICTIONAL

UNKNOWN

# The answer in 60 seconds

FICTIONAL

Open the second branch without adding a second administrative layer.

Win on controlled QuickBooks cutover, implementation ownership, predictable 15-user cost, and field adoption. Do not lead with generic AI, generic ease of use, or unsupported claims about competitor complexity.

Primary threat: Jobber

Aspirational threat: ServiceTitan

Core message

Run the field without breaking the books.

A positioning hypothesis that must be proven in the buyer's own accounting workflow.

## Threat map

| RIVAL         | WHY IT MATTERS                                                                                                               | WHAT TO DO                                                                      |
|---------------|------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------|
| Jobber        | Public 15-user Grow pricing matches the fictional \$499 RelayFSM price. Its newer QBO workflow surfaces errors and warnings. | Test the same five accounting events. Compare exceptions and cutover ownership. |
| Housecall Pro | Low entry-price optics can anchor the owner before users and Max requirements are normalized.                                | Require a written 15-user configuration and test revised or cancelled invoices. |
| Workiz        | Strong communications and AI story can dominate a feature-led evaluation.                                                    | Separate base subscription from Genius products and score the finance workflow. |
| ServiceTitan  | Platform breadth can feel safer for future growth.                                                                           | Model only the next 24 months and qualify advanced commercial needs early.      |

# Who must believe what

## Stakeholders

ECONOMIC BUYER

**Owner**

A second branch can open without another finance administrator.

CHAMPION

**Controller**

Invoice, payment, refund, void, and tax exceptions are visible and controlled.

EVALUATOR

**Service manager**

Technicians adopt the workflow without slowing dispatch or field completion.

## Decision criteria and proof

| CRITERION                              | WEIGHT | PROOF RELAYFSM MUST PROVIDE                                          |
|----------------------------------------|--------|----------------------------------------------------------------------|
| QuickBooks integrity and close control | 30%    | Complete the five-event accounting test and reconcile every result.  |
| Migration, rollout, and adoption       | 25%    | Written 10-day plan, sample migration, and technician pilot.         |
| Dispatch and field workflow            | 20%    | Live service-call workflow, including offline mode.                  |
| 18-month total cost                    | 15%    | Written price with users, implementation, support, and add-ons.      |
| Growth, security, and data control     | 10%    | API and export demo, security packet, and stated scaling boundaries. |

UNKNOWN

Do not assign competitor scores until every finalist has completed the same workflow test and supplied the same commercial inputs.

## High-value discovery

- What fails when the second branch opens under the current process?
- How often are invoices edited, voided, or cancelled after initial posting?
- Which workflows must work without connectivity or in Spanish?
- Which capabilities are required now versus a hypothetical future phase?
- What evidence must the owner, controller, and service manager each see?

# Normalize packaging before the buyer compares price

Public pricing is a starting point, not a substitute for a dated written quote.

| VENDOR        | PUBLIC PACKAGING                                                                                                     | QUICKBOOKS EVIDENCE                                                                                                         | DEAL IMPLICATION                                                                                                 |
|---------------|----------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------|
| RelayFSM      | Fictional: \$499/month, month-to-month, up to 20 active users. Guided implementation included.                       | Fictional CloseGuard: conflict preview, daily reconciliation, exception owner, and audit trail.                             | Prove the accounting workflow live. Fictional product claims have no value without demonstration.                |
| Jobber        | For 15 users, Grow lists \$499 month-to-month or \$399/month annual-prepaid. Plus lists \$699 or \$529 respectively. | Newer QBO workflow has an error and warning dashboard, guided resolution, and some bulk handling.                           | Treat Jobber as a serious accounting competitor. Confirm newer integration access and run the same test.         |
| Housecall Pro | Max lists \$329 monthly or \$299/month annual, includes 8 users, and lists added users at \$75/month.                | Invoices, payments, customers, and new price-book items push to QBO. Some revisions and cancellations need manual handling. | Calculated 15-user Max estimate is \$854 monthly. Label as arithmetic and verify with a written quote.           |
| Workiz        | Standard, Pro, and Ultimate are quote-based. Several Genius products are shown as separately sold.                   | Sync direction varies by resource: clients and non-inventory items can be two-way; invoices flow to QBO.                    | Obtain an exact package map. Do not use cached third-party prices or assume every Genius capability is included. |
| ServiceTitan  | Starter, Essentials, and The Works use request-based, per-technician pricing.                                        | Direct QBO setup requires account configuration; Touchless Integration requires exact GL-account naming.                    | Normalize the written quote, implementation resources, required Pro products, and accounting configuration.      |

CALCULATED

Housecall Pro arithmetic:  $\$329 + (7 \text{ additional users} \times \$75) = \$854/\text{month}$ . This is not an offered quote.

# Primary threat: price parity plus a stronger accounting defense

## Why this competitor legitimately wins

- Transparent pricing across team sizes and commitment options.
- A 14-day Grow trial and familiar small-business positioning.
- A newer QBO dashboard surfaces errors and warnings.
- At 15 users, public Grow month-to-month pricing equals fictional RelayFSM pricing.
- Plus bundles pipeline, marketing, AI Receptionist, onboarding, and premium support.

### RECOMMENDED

## RelayFSM win path

Do not argue that Jobber lacks accounting controls. Ask both vendors to perform the same five accounting events, then compare what the controller sees, how exceptions are cleared, and who owns the cutover.

## Discovery questions

- Which 15 people need full access now and after the second branch opens?
- Is Grow sufficient, or do Plus capabilities make it the real comparison?
- Is the newer QuickBooks integration available to this account?
- Who migrates customers, price-book items, open invoices, and memberships?
- What happens when a tax mapping fails or the accounting period is closed?

## Landmines

- Do not say Jobber lacks QuickBooks exception handling.
- Do not call it a one-person product.
- Do not claim RelayFSM has unique Spanish access.
- Do not mix annual-prepaid and month-to-month prices.
- Do not ignore Plus bundles when the buyer needs them.

### Official sources

[Jobber official pricing](#)

[Jobber official QBO error guide](#)

# Price-optics threat: normalize the 15-user configuration

## Why this competitor legitimately wins

- A purpose-built home-service story and 14-day Max trial.
- No required long-term contract according to the pricing FAQ.
- Offline viewing and English/Spanish mobile access are publicly listed.
- Max includes route optimization, recurring plans, API access, and onboarding.
- A low one-user headline price creates strong entry-price optics.

### RECOMMENDED

## RelayFSM win path

Normalize the actual package before discussing price. Then make invoice changes and cancellations part of the test: what happens after an invoice first reaches QuickBooks, who resyncs revisions, and who clears cancellations?

## Discovery questions

- Which Max-only capabilities are mandatory?
- How many users are included in the written quote?
- How often are invoices revised after their first accounting sync?
- Who manually resyncs revised invoices or cancels them in QBO?
- Which optional products are part of the actual solution?

## Landmines

- Do not claim it lacks offline mode, Spanish, route optimization, API, plans, or onboarding.
- Do not say it requires an annual contract.
- Do not present \$854 as an offered price.
- Do not compare a team price with a one-user Basic headline.

### Official sources

[Housecall Pro official pricing](#)

[Housecall Pro official QBO sync guide](#)

# Wildcard: strong communications and AI packaging

## Why this competitor legitimately wins

- Broad all-in-one operations narrative.
- Strong phone and AI story.
- Ultimate lists inventory, service plans, proposals, multi-day jobs, equipment, purchase orders, and API.
- QuickBooks resource syncing includes two-way clients and some two-way item or payment behavior.
- A short self-service trial lowers evaluation friction.

### RECOMMENDED

## RelayFSM win path

Avoid an AI feature war. Separate the base subscription from Genius products, identify exact sync direction for every accounting object, and compare the written total with the controller workflow Briar Ridge needs.

## Discovery questions

- Which Genius products are required and separately priced?
- Is Ultimate required for plans, inventory, API, or multi-day jobs?
- Does the team need QBO-originated invoice changes to return to the FSM?
- Is the newer client portal required, and is it compatible with the sync setup?
- What is the complete 15-user price, including communications and onboarding?

## Landmines

- Do not state a subscription price; the official page requests pricing.
- Do not assume every Genius capability is included.
- Do not call its QBO integration simply one-way; direction varies by resource.
- Require written confirmation where current phone packaging is ambiguous.

## Official sources

[Workiz official pricing](#)

[Workiz official QBO resource guide](#)

[Workiz official client portal guide](#)

# Aspirational threat: breadth can feel like future-proofing

## Why this competitor legitimately wins

- Very broad residential and commercial operating coverage.
- Deep dispatch, reporting, pricebook, membership, payroll, marketing, financing, and accounting capability.
- Publicly listed APIs, inventory, commercial agreements, equipment history, and project workflows.
- Strong AI roadmap and current virtual-agent capabilities.
- Request-based, per-technician packaging is designed to scale.

### RECOMMENDED

## RelayFSM win path

Qualify rather than attack. If Briar Ridge needs heavy commercial projects, multi-party billing, deep inventory, or an enterprise operating suite, ServiceTitan may be right. Otherwise compare the resources and cost needed for a clean QBO close and adopted second branch.

## Discovery questions

- Which capabilities require Pro products or more configuration?
- What is the full 12-technician quote and implementation scope?
- Who owns business-unit and GL-account configuration?
- Which enterprise workflows will actually be used within 24 months?
- What are the written export, renewal, and scaling terms?

## Landmines

- Do not call ServiceTitan only for large companies.
- Do not cite anonymous online price estimates.
- Do not infer implementation duration from platform breadth.
- Separate generally available AI from preview and add-on requirements.
- Qualify out if the buyer needs RelayFSM's stated non-fit workflows.

### Official sources

[ServiceTitan official pricing](#)

[ServiceTitan official QBO setup](#)

[ServiceTitan May 2026 product update](#)

# Concede what is true. Redirect to proof.

## "Jobber costs the same and is better known."

That is fair. Public 15-user Grow month-to-month pricing is the same \$499. Let us compare accounting events, migration ownership, support level, and the full required package. If Jobber performs better on your priorities, choose it.

## "Housecall Pro starts at only \$59."

That is an annual one-user Basic price. Your evaluation needs 15 users plus Max capabilities. Obtain a written configuration rather than anchor on the entry plan.

## "Workiz already has AI phones and answering."

Yes. AI answering is becoming normal in this category. Score it on booking accuracy, escalation, language support, usage charges, and auditability - and separately test what reaches QuickBooks.

## "ServiceTitan is the safer long-term choice."

It may be if your roadmap includes the advanced workflows it covers. Model the next 24 months, not an undefined future, then compare implementation capacity, required products, total cost, and exit options.

## "We cannot risk breaking QuickBooks during a switch."

That is the right concern. Do not trust a slide. Map the accounts, migrate a representative sample, run five accounting events, reconcile the results, and agree on rollback criteria before cutover.

## "You are a smaller vendor."

Correct. Compensate for that risk with a monthly agreement, complete exports, a security packet, named implementation ownership, a controlled pilot, and references. If RelayFSM cannot supply those, do not buy.

# The five-event accounting test

Every finalist performs the same test in a clean QuickBooks Online sandbox. This turns positioning into falsifiable proof.

| STEP | EVENT                                                                       | WHAT TO OBSERVE                                                            |
|------|-----------------------------------------------------------------------------|----------------------------------------------------------------------------|
| 01   | Create a customer, estimate, job, invoice, and initial accounting sync.     | Sync trigger, mapped records, timestamps, and QBO result.                  |
| 02   | Take a deposit and partial payment.                                         | Payment direction, deposit treatment, balances, and audit trail.           |
| 03   | Change quantity, price, and tax after the first sync.                       | Edit propagation, warning behavior, user action, and final QBO state.      |
| 04   | Void or cancel the invoice and issue a refund.                              | Required manual steps, reversal records, and reconciliation impact.        |
| 05   | Create a duplicate customer or tax-mapping conflict during a closed period. | Visible exception, owner, resolution controls, and closed-period behavior. |

## Score each event

|                      |                          |                         |                             |                              |
|----------------------|--------------------------|-------------------------|-----------------------------|------------------------------|
| 01<br>Sync direction | 02<br>Trigger and timing | 03<br>Visible exception | 04<br>Resolution steps      | 05<br>Bulk resolution        |
| 06<br>Audit trail    | 07<br>Named owner        | 08<br>Result in QBO     | 09<br>Reconciliation report | 10<br>Customer-record effect |

# A 15-day path to a defensible decision

| DAY | ACTION                                          | OWNER                | EXIT CRITERION                           |
|-----|-------------------------------------------------|----------------------|------------------------------------------|
| 1   | Confirm users, requirements, and disqualifiers  | Buyer + AE           | Agreed requirements sheet                |
| 2   | Normalize every written quote                   | Controller           | Same users, terms, features, and add-ons |
| 3   | Run the five-event accounting test              | Solutions consultant | Reconciled QBO output                    |
| 5   | Migrate a representative data sample            | Implementation lead  | Accepted migration report                |
| 7   | Technician field pilot: offline and Spanish     | Service manager      | Adoption checklist signed                |
| 9   | Review 24-month cost and scaling model          | Owner + controller   | Financial approval                       |
| 11  | Security, contract, export, and rollback review | Buyer + vendor       | No open critical issue                   |
| 13  | Similar-customer reference                      | Owner                | Reference complete                       |
| 15  | Final decision                                  | Economic buyer       | Signature or clear no-decision reason    |

FICTIONAL

RelayFSM should qualify out if the buyer needs more than three branches, heavy commercial construction, deep procurement or inventory, or integrated payroll. A credible battlecard gives the rep permission to lose the wrong deal.

# Current signals, sources, and claim controls

## Recent competitive signals

- **Jobber:** Newer QBO documentation describes surfaced errors and warnings plus bulk resolution for some cases. Retire old claims that errors are hidden.
- **Jobber:** Plus bundles pipeline, marketing, AI Receptionist, onboarding, and premium support. Compare the current required bundle.
- **Housecall Pro:** A public roadmap points to Building and Shipped lists. Recheck shipped status before asserting a gap.
- **Workiz:** AI and communications are central to its message. Generic AI positioning will disappear in the noise.
- **ServiceTitan:** Recent releases widen AI, financial, agreement, project, CRM, and equipment scope. Qualify complex needs early.

## Claim-control rules

- Absence from a marketing page is not proof a feature is absent.
- Never compare one-user annual pricing with a 15-user monthly package.
- Use dated written quotes for Workiz and ServiceTitan.
- Label public-price arithmetic as calculated and verify the quote.
- Retire a claim as soon as a primary source contradicts it.

## Primary-source register

- 01 [Jobber pricing](#)
- 02 [Jobber QBO errors](#)
- 03 [Housecall Pro pricing](#)
- 04 [Housecall Pro QBO sync](#)
- 05 [Housecall Pro roadmap](#)
- 06 [Workiz pricing](#)
- 07 [Workiz QBO resources](#)
- 08 [Workiz client portal](#)
- 09 [ServiceTitan pricing](#)
- 10 [ServiceTitan QBO setup](#)
- 11 [ServiceTitan May 2026](#)

**Methodology**

Only official vendor pages and help documentation were used. RelayFSM and all buyer facts are fictional. Calculations are labeled. Interpretations are separated from vendor-stated facts. Every production engagement should recheck sources immediately before delivery.

Not commissioned by or affiliated with Jobber, Housecall Pro, Workiz, ServiceTitan, or Intuit.