

The environmental consulting software checklist

Environmental and engineering firms bill multiple roles at different rates, mark up sub-consultants, and run project structures that generic software often can't represent. Most software evaluations stall on feature lists and pricing pages, which tend to look similar across vendors regardless of what the software actually does once real projects run through it. The gap between what a demo shows and what the software does on a real job is where firms lose margin later, not upfront. This checklist breaks the evaluation into four specific things to check, plus the warning signs worth catching before anything gets signed.

1. Project structure that holds real complexity

Check whether the software can represent your actual project structure, not just a list of tasks with labels on it.

- Can a project hold phases as their own trackable layer, not just tags on a task?
- Can sub-consultants be tracked separately from your own team's time and hours?
- Can one task depend on another, so the schedule reflects how the work actually sequences?
- Are billing rates tied to the project structure itself, or entered separately after the fact?

2. One person, two roles, billed at the right rate

Check whether the billing model can represent one person working more than one role on the same project.

- Can a single person log time under two different roles on the same project?
- Does each role carry its own billing rate, applied automatically when the time is logged?
- Ask directly: what happens when a senior scientist logs both field hours and project management hours on the same job? Get a specific answer, not a general one.
- Does the answer require a manual workaround outside the system, a second spreadsheet, a separate rate calculation, to make the numbers come out right?

3. Billing complexity generic tools can't handle

Check whether the software can run more than one billing type on the same project at once.

- Can one project run fixed fee for one phase and time and materials for another, inside the same system?
- Can a sub-consultant's invoice be marked up and passed through as part of the total, without a manual recalculation?
- Ask to see an invoice generated directly from a project with mixed billing types. If the answer involves exporting to a spreadsheet first, that's the software telling you where its limit is.
- Ask how a missed or incorrectly applied markup would actually get caught, before the invoice goes out, not after.

4. Software built around how the firm actually works

Check whether the platform was designed for project-based, multi-rate billing from the start, or adapted from something built for something else.

- Does the vendor's team understand your project types without you explaining them first?
- Are sub-consultants a real, trackable part of the system, or just a line item on an invoice?
- If you took the industry language out of their pitch, would the underlying product description still hold together?
- Is the platform's structure the starting design, or does it feel like generic project management software with environmental terms added on top?



"The gap between what a demo shows and what the software does on a real job is where firms lose margin later, not upfront."

Red flags to watch for

- Data export is vague, limited, or comes in a closed format. Ask directly how you'd get your data out, projects, time records, invoices, and in what format. A vague assurance isn't an answer.
- The contract auto-renews with a short window to exit. A term that silently renews and only gives you a narrow notice period to leave isn't unusual, but it's worth knowing before you're inside it, not after.
- The vendor won't let you test the software with your own data. A demo running on curated example data shows the best case. A refusal to test with a couple of your own real projects is the software telling you it might not hold up under real conditions.
- Costs that weren't in the initial quote start showing up. Integrations, extra users, priority support, all can add past what the quote suggested. Ask what's included at your tier, in writing, before you sign.

None of these mean walk away automatically. They mean ask the question directly, and pay attention to how directly it gets answered.

Next step

If it would help to see this against your own numbers, EVX Software can set up a working session using two or three of your real projects and your actual rate structure, not a generic walkthrough. You bring the projects, we build the setup, and you see exactly how your billing structure holds up before you commit to anything.