

# Justification Toolkit

*Build your business case in ten minutes.*

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Explorer ELEVATE 2026 is Explorer Software's annual user conference – three days of Evolution-focused training, hands-on workshops, peer networking, and direct access to the product team behind the software that runs your service business every day.

**September 28–30, 2026 • Hyatt Regency Coconut Point Resort & Spa, Naples, Florida.**

If you run the office or the day-to-day operation – and you need to make the case to the owner – this toolkit does the heavy lifting. It has three parts: talking points you can use in conversation, a cost/benefit worksheet you can fill in and attach, and a copy-paste email template you can send to your boss.

## Part 1 | ROI Talking Points

*Seven reasons ELEVATE pays for itself, written in the language of your bottom line:*

- **Squeeze more jobs out of every day.** Sessions on dispatch, scheduling, and field productivity show you how to route smarter, match the right tech to the right job, and cut wasted truck rolls – so the same crew can handle more calls per week without burning out.
- **Get cash in the door faster.** On-site invoicing, mobile payment capture, and billing workflow sessions close the gap between job completion and money in the bank. Tightening up billing by even a few days can meaningfully improve your cash position.
- **Turn one-time jobs into recurring revenue.** Sessions on service agreements and maintenance contracts show you how to automate renewals, price for profit, and build the kind of predictable, recurring revenue that smooths out your year and makes your business more valuable.
- **Stop leaving money on the table.** Most Evolution users underuse at least one revenue-generating feature – CRM, sales tracking, marketing automation, warranty recapture, upsell prompts. A few days at ELEVATE typically surfaces at least one that pays for the whole trip.
- **Get more time with Evolution experts on the Bonus Day.** The Bonus Day on September 30 is built for extra Evolution-focused learning and deeper conversations with the Evolution team. Come with a list of things that you'd like to dig into with our experts and your peers.
- **Learn from contractors who've been in your shoes.** Every hallway conversation is a free case study. Learn how other HVAC, plumbing, electrical, and mechanical shops your size handle dispatch, pricing, retention, and service agreements – and steal the best ideas.
- **Read the market with a top construction economist.** – Keynote speaker Richard Branch – former Chief Economist at DODGE – delivers a forward look on contractor market trends. Service contractors feel those trends directly in new-install demand, replacement cycles, and the hiring market. Use it to inform pricing, hiring, and growth decisions for the year ahead.

## Part 2 | Cost/Benefit Worksheet

Use the guidelines below to estimate your total investment, then fill in the right-hand column and attach to your approval request.

### Estimated Investment

Expense	Guideline	Your Estimate
<b>Conference Registration</b>	<p><b>Early Bird:</b> \$1,287 USD (through June 30, 2026)  <b>Regular:</b> \$1,487 USD (after June 30, 2026)</p> <p><i>Same price for the 2-day or 3-day (Bonus Day) option – choose the 3-day to get the most value.</i></p> <p><i>Register at <a href="https://explorer-software.com/elevate">explorer-software.com/elevate</a></i></p>	\$
<b>Flight(s)</b>	<p>Fly into <b>Southwest Florida International Airport (RSW)</b>.</p> <p><i>Check your preferred carrier for current round-trip fares from your home airport.</i></p>	\$
<b>Lodging</b>	<p>Hyatt Regency Coconut Point group rate: <b>\$279 USD/night</b> plus taxes and resort fees.</p> <p>Book 3–4 nights depending on your arrival and whether you stay for the Bonus Day.</p> <p><i>Book via the group link at <a href="https://explorer-software.com/elevate">explorer-software.com/elevate</a></i></p>	\$
<b>Ground Transportation (airport ↔ resort)</b>	<p>Approximately a <b>25-minute drive</b> from RSW to the resort.</p> <p>Rideshare / taxi: <b>~\$55–75 USD one way</b>. Rental cars also available at the airport.</p> <p><i>Tip: costs can be shared when travelling with colleagues.</i></p>	\$
<b>Mileage Reimbursement (if driving)</b>	<p>Driving to the conference or to your departure airport? Multiply your round-trip distance by the applicable rate:</p> <p><b>United States:</b> 72.5 cents per mile (IRS 2026 standard business rate)</p>	\$
<b>Airport Parking</b>	<p>If you're flying and leaving your vehicle at your home airport, budget for long-term or economy lot rates multiplied by your number of travel days.</p>	\$
<b>Meals</b>	<p><b>Most meals during the conference – including dinners – are included in your ticket.</b> Budget only for travel-day meals (arrival and departure).</p>	\$

Expense	Guideline	Your Estimate
	<b>Guideline:</b> ~\$80 USD per day for meals & incidentals (based on the GSA FY2026 per-diem for the Naples area – roughly \$18 breakfast, \$20 lunch, \$37 dinner, \$5 incidentals).	
<b>Incidentals</b>	Tips, checked baggage, in-flight WiFi, and similar extras. Typical allowance: <b>~\$25-50 USD.</b>	\$
<b>TOTAL ESTIMATED INVESTMENT</b>		\$

*All guideline amounts are shown in USD unless otherwise noted.*

### The Return: What You'll Bring Back

*The investment above is straightforward. The return is harder to put a single number on – but it shows up in all the usual places:*

- More jobs per week from tighter dispatch, routing, and scheduling
- Faster cash flow from on-site invoicing and payment capture
- New recurring revenue from better service agreement management
- Fewer missed upsells, warranty recaptures, and marketing opportunities
- Less admin time for you and your office staff
- Better pricing, hiring, and growth decisions informed by dashboards and the market outlook
- A playbook you can share with your techs and office team

### What's Included in Your Ticket

- All Evolution classroom learning, hands-on workshops, and the keynote address
- The Bonus Day on September 30 – extended learning and time with the product team
- Breakfast, lunch, and dinners throughout the conference
- Monday Welcome Reception
- Tuesday Night Special Event – dinner, entertainment, and open bar (included when you stay for the Bonus Day)

### About the Bonus Day

*The Bonus Day on September 30 is included in your ticket at no extra charge. It's extra Evolution-focused learning and extended time with the product team. Registering for the 3-day option costs the same as the 2-day option, and also unlocks the Tuesday Night Special Event. There's really no reason not to stay.*

# Part 3 | Manager Approval Email Template

Copy the email below, customize the bracketed sections, and send it to the owner. Bracketed grey text is a prompt – replace it with your own details.

## Suggested Subject Line

Request to attend Explorer ELEVATE 2026 – Explorer’s Evolution user conference

## Email Body

Hi [Owner’s first name],

I’d like to attend **Explorer ELEVATE 2026**, Explorer Software’s annual user conference for Evolution customers, taking place **September 28–30, 2026 at the Hyatt Regency Coconut Point in Naples, Florida**. I’ve put together a short business case below so you have everything you need to make a call.

### Why it matters for the business

Evolution runs [describe what Evolution runs for us – e.g., dispatch, invoicing, service agreements, payroll, the mobile app the techs use every day]. ELEVATE is the only event that brings Explorer’s product team, trainers, and Evolution customers together in one place. It’s where I can cover more ground in three days than I could in three months of self-directed learning, and come back with specific, actionable improvements to how we run the shop.

### What I plan to bring back

- Targeted training on [1–2 specific Evolution areas tied to a current pain point – e.g., dispatch, invoicing, service agreements]
- Time with Evolution product experts to work through [specific issue we’re trying to solve]
- Best practices from peer contractors in our trade
- An early look at Explorer’s product plans so we can plan around what’s coming
- A market outlook from keynote speaker Richard Branch (former Chief Economist at DODGE) to help inform our [pricing / hiring / growth] decisions for the year ahead
- A written summary and short internal debrief for the rest of the team when I’m back

### Estimated cost

- Conference registration (early bird, locked in before June 30): \$1,287 USD
- Hotel – [#] nights at the group rate of \$279/night + taxes: ~\$[total]
- Round-trip airfare to Southwest Florida International Airport (RSW): ~\$[estimate]
- Ground transportation and incidentals: ~\$[estimate]

**Total estimated investment: \$[total]**

(A detailed cost/benefit worksheet is attached for reference.)

### A note on the Bonus Day

I’d like to register for the 3-day option, which includes the Bonus Day on September 30. It’s the same price as the 2-day ticket but includes extended learning time with Evolution experts and the Tuesday Night Special Event.

## Coverage while I'm away

*[Brief plan – who covers dispatch, customer calls, and the office while you're away, how urgent items will be handled, and how you'll stay reachable for anything that can't wait]*

## Next step

Early bird pricing ends June 30, 2026, so I'd like to confirm by [*your target decision date*] to lock in the lower rate and book flights before prices climb. Happy to walk through any of this in person, and I'll share everything I learn when I'm back.

Thanks,

[Your name]

## Pro tips before you send

- Tie at least one session to a current pain point – jammed schedule, slow invoicing, missed renewals, payroll headaches. Specificity sells.
- Have a real plan for who covers your responsibilities while you're away. That's usually the first question you'll get.
- Offer to debrief the team after the conference – office and field. It turns your ticket into shared upskilling.
- Attach this Cost/Benefit Worksheet so your numbers are backed up.
- Send it early. The sooner you lock in early bird pricing and flights, the better – pricing expires June 30, 2026.

**Ready to register?**

[explorer-software.com/elevate](https://explorer-software.com/elevate)

*Questions? Email [elevate@explorer-software.com](mailto:elevate@explorer-software.com)*