FieldConnect

Connecting Your Mobile Workforce

CREATING BETTER CUSTOMER EXPERIENCES

Field Service Guide

2022

Field Service Guide: Creating Better Customer Experiences

As a field service business owner, manager, or foreman, there's no shortage of people ready to dish out advice on how you could run your projects better.

You may hear advice from your peers like, *"Always have the best price,"* or *"Give them more than what they're expecting."*

Generally speaking, this is decent advice. Competition amongst businesses is always increasing and customers have more choices than ever when deciding who to give their business to. And while the advice we just mentioned is good, with a few tweaks, it can be even better.

Success in the field service industry is all about the "**three exes**":

- Expectation
- Execution
- Experience

By understanding what customers want as well as setting the proper expectations, we can execute on tailor-fit solutions to provide a better customer experience. These three factors will determine every interaction with customers regardless of business or industry sector.

How to Create Better Customer Experiences Through Expectations

When people think about getting the best price possible, they usually mean _cheapest_. After all, as customers ourselves, we like to feel we've gotten a great deal on a product or service; what feels better than saving money?

The second piece of advice is usually assumed to mean that, as a service-based business, you do more than the scope of the work provided without additional compensation. And while a customer should always expect that their service technician is competent, well-trained, and knowledgeable, there should never be a situation where they're expected to do more than the scope of the work provided.

Here's a quick example to help drive these points home further.

EXAMPLE: An HVAC business receives a residential service inquiry to service a malfunctioning thermostat.

> A lead comes in, the customer describes the issue they're having. Your call center acknowledges the issue, reassures them that help is on the way, and then informs the customer of the $50 service call fee. The customer agrees to the pricing and the company deploys a service technician to the job.
>
> While on the job, the HVAC tech checks the thermostat but determines it to be functioning normally.
>
> Moving on to the condenser, the technician notices that coils are pretty gunked up and proceeds to give them a very thorough cleaning. After the coil cleaning, the technician heads back inside and checks the filters — they're very dusty and need replacing. They head out to the truck to grab a pack of replacement filters. The technician informs the customer that the thermostat seems fine but that they noticed a vent that wasn't producing any airflow. The customer states that it hasn't worked properly in months and they haven't had the chance to get it looked at.
>
> Being the nice guy that he is, the HVAC tech takes a look in the attic and notices that some of the ductwork is ripped and should also be replaced. He heads out to the truck, grabs about six feet of flex duct, and quickly replaces the deteriorated section.
>
> After delivering the final invoice, he tells the customer that the ductwork repair and coil cleaning are 'on the house'. "I even went ahead and replaced your filters for you at no charge. Just remember us for your future heating and cooling needs!"

The customer is ecstatic that the HVAC company's technician did more than what was asked of them and at no additional charge. **Win-win, right?**

Well, let's step back for a moment.

Did the HVAC company *actually* provide the customer with the best possible price?
No.

> It's not the best possible price for the customer because the company didn't seek out any customer pain points or perform any further qualifications. While we know that customers shop for the cheapest price in most cases, that cheap price coincides with a purchase solving their needs. And in order to truly solve their needs, we need to figure out what *all* of their needs are.

Did the technician give the customer more than they were expecting?
Yes.

They absolutely exceeded the customer's expectations — they worked for free! The customer reached out to the business with the expectation to pay some denomination of money for the service to be rendered. In our example scenario, the technician certainly went above and beyond with the coil cleaning, duct replacement, and free filter replacement. However, by working for free, we run the risk of devaluing our services in the future.

Sometimes the customer knows exactly what they need — other times, there will be opportunities to discover more needs. When fielding an **inbound lead** - meaning a <u>lead</u> that reaches out to your business - it's important to make a habit of fully qualifying that lead in order to provide the best possible solution. One of the best ways to learn more about a customer's needs is discovery questions.

What Are Discovery Questions?

Discovery questions are open-ended questions used to discover more information about a particular topic from your customer.

The reason why the HVAC company didn't give the best possible price is that they never probed the customer for other needs. In the residential service sector, especially home improvement and maintenance, most homeowners have<u> nine</u> pending home improvement projects and are<u> putting them off</u>. In our example, the HVAC company was called out for the first problem only to discover several more while on-site. If they had asked some discovery questions at the first point of customer contact, the customer may have cited more issues. Additionally, this could increase our total service billables.

By gathering this discovery information, the technician would have also been better prepared to handle various situations on the job while adding incremental revenue for his company.

Asking discovery questions may seem daunting if you're not used to asking them, but in reality, are incredibly simple. While there's not necessarily one better way to ask discovery questions over another, a good formula for asking is: KAT

The KAT Method of Asking Discovery Questions

The KAT method is a simple, formulated method for discovering pain points that is both brief and repeatable.

Keep the questions open-ended - This simply means asking questions that *cannot* be answered with a simple 'yes' or 'no'.

Ask for clarification - This is when you ask a closed-ended question, which means a question that *can* be answered with 'yes' or 'no'.
Thank them for their answer, then restart the process if necessary - Until the customer says there's 'nothing else', restart the KAT formula.

An example of the KAT method in use is:

HVAC Call Center: What issues are you having with your thermostat? (**K - open-ended question**)

Customer: I'm not exactly sure but I don't seem to be getting any cool air.

HVAC Call Center: Is there more than one room affected? (**A - clarify with closed-ended questions**)

Customer: No, it seems to only be in the living room.

HVAC Call Center: Ok, thanks for that. Are there any other issues you've noticed? (**T - thank them and repeat the process if necessary**)

By asking discovery questions, you'll be better equipped with the information needed to provide effective solutions for your customers.

So now that we have a good idea about the ways we can better understand our customers' expectations to deliver an incredible experience, let's talk about how to execute these principles successfully.

How to Create Better Customer Experiences Through Execution

Improving Customer Response Time

If field service was a restaurant, discovery questions would help us build a perfect menu. Response time, then, would be how fast we're able to feed the customer — from taking the order, cooking the food, and serving them at their table.

Having great field service software certainly helps with aspects of response time like technician deployment, location-based check-ins, and job priority. But if we're not sticking to arrival schedules, we're failing customer expectations, which — you guessed it — creates a bad customer experience.

It goes beyond just arriving on time, too. See, the first customer of the day's response time directly affects other customers in your service queue. When we can achieve the fastest possible response time, we provide better customer experiences overall. It can also help as a time buffer should a job go on for longer than intended. And while we definitely don't want to take more time than needed, having that flexibility can be game-changing. Jobs that go over their expected time can quickly lead to a disastrous day, both for you and for your customers. Most jobs, especially in an occupied dwelling, will require a customer representative to be there. In some cases, a job cannot be completed without final customer approval or without them being on-site. This leads to more delays, low first-time fix rates, and potentially a negative impact on customer retention.

When jobs start on time and are completed efficiently, customers can get back to their day. This allows your technicians to serve more customers, have a better work-life balance, and most importantly, maintain a happy clientele.

For more on this topic, check out our guide on [the best ways to improve your customer response time](#).

Customer Self-service

One of the best things you can do as a field service business is to empower your customers with various self-service options along with the education to complete it effectively.

A good example of customer self-service would be instructing a customer on how to turn off their sink's water valve in the event of a plumbing issue. This is doubly effective for two reasons; an empowered customer can save themselves money while also saving your technician's time.

If the customer had the knowledge and ability to turn off the kitchen sink's water valve, it could've helped eliminate water waste while preventing further potential damage to kitchen fixtures or flooring. For the technician, this can speed up their time on the job by eliminating the need for cleanup and giving them more time to address the main issue, such as a leaky sink or a pipe leak. Thinking back to response time, faster job completions mean more jobs can be completed per day.

A knowledge database on your company's website is a great way to provide continuous value for customers by providing helpful tips for common

maintenance issues. This can be in the form of an FAQ page, a blog post, or audio and video content. A quick video on how to properly reset a breaker is extremely beneficial to customers who may have otherwise called and scheduled an appointment.

Keep in mind, this shouldn't be seen as a missed opportunity for additional work. In fact, content like this will help to further establish your company as an industry authority while helping customers through education.

Additionally, you can create an online self-service portal that gives your customers the ability to schedule their own service on their own terms. They'll also be able to access billing information along with current work order status and maintenance history.

These and other self-help resources not only provide excellent value for new and existing customers alike but also serve to increase trust and authority for your business.

For more on this topic, check out our guide on empowering customers through self-service.

Technician Customer Service and Sales Training

When we think of the best advocates for handling customer service and sales, we usually think of dedicated customer service reps and sales reps. But it's the field service technicians that have the biggest opportunity to capitalize on sales opportunities while providing stellar experiences.

In truth, your technicians are probably your best assets as they're able to not only complete a job but also sell more jobs. It starts with training them on customer interactions which should be a part of your overall experience strategy. When they perform site inspections, they can spot incremental revenue opportunities firsthand. This allows them to make on-the-spot product or service recommendations.

For example, a garage door technician may be called to a job to fix a busted spring. When replacing the spring, they notice that the customer's rollers are worn out and prone to failure. Since customers may not be able to easily identify roller issues, the technician can make the recommendation to go ahead and replace them while they're on-site.

Now, the customer is happy to avoid having to pay for another potential service call in the future and you've increased the job's value while delivering an excellent customer service experience.

For more on this topic, check out our guide on [increasing technician productivity through sales and service training](#).

Maintaining Customer Records

Customer records are a pain point for lots of companies. A successful business may be adding hundreds or even thousands of new entries per month. This is great for business — it means you're doing something right! But managing all of those records can be a daunting task, especially if you're still on a paper-based system. Even a basic understanding of computers or smartphones can open up an entirely new world of potential productivity tweaks.

By maintaining accurate records, we can dramatically reduce the amount of time it takes to process invoices, handle scheduling issues, and complete other time-intensive tasks. Aside from the productivity benefits, poor customer records could lead to the biggest business killer of all — lost revenue.

If you've ever double booked a service appointment, the ramifications probably still hurt and at least one of your customers was left unhappy. Customers rely on your service to address their needs and they trust that you'll be there on time to get the job done. The last thing you want to happen is for that *expectation* to properly *execute* a job to leave your customer with a bad *experience*.

For more on this topic, check out our guide on [the powerful benefits of maintaining customer records](#).

Expectation, Execution, Experience

You've got a lot of moving pieces in your business. From accounting and scheduling to active service requests and increasing sales volume, the life of a field service business is constant and demanding. Despite the complexities that can come with the business, it's one of the most rewarding and profitable businesses when done right. No matter where you're at in your current business or which system you're currently using, we offer powerful solutions that cater to many different industries. Your business — and your customers — will thank you for it.

If you're ready to spend less time managing tasks and more time completing them, **REACH OUT, AND FIND OUT how FieldConnect can revolutionize the way you do business.**