

Sage Construction and Real Estate Solutions



Improve service
operations and
wow your
customers



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Introduction

Companies can't use the excuse that they forgot about a job, lost the invoice, or didn't have a necessary part and expect to retain loyal customers. Instead of leaving a customer site or completing a work order and realizing that important information is missing, service companies can integrate technology into their operations to better equip service managers, office staff, and field technicians. Additionally, these companies can allow customers to self-serve and look up their account information, schedule a service call, or pay their bills online.

Responsiveness is a critical key performance indicator (KPI) for all roles in service operations. Service managers need to optimally schedule and assign work to field technicians. Field technicians need to complete work orders in a timely and efficient manner. It's also important that office staff, including accounting, can follow up with customers quickly or offer customers the ability to self-check information, schedule appointments, and request maintenance.

However, there are many challenges that specialty contractors must overcome in order to both improve the scheduling and completion of work orders and collect timely payment. In the office, warehouse inventory managers find it difficult to keep important parts on hand and make timely inventory adjustments. Many field technicians struggle with a lack of visibility into job assignments, equipment history, and more when on site. Without the ability to generate purchase orders in the field, jobs often come to a halt while technicians wait to get needed parts or tools. In fact, inefficient business processes can account for up to 80% loss in productivity according to a report by the McKinsey Global Institute.

To be successful, contractors must eliminate the manual processes that drag down service efficiency. Using new technology that works wherever you do, contractors can bridge the gap between field technicians and office staff—and between the contractor and their customers—to keep employees informed and productive and work orders moving.

Inefficient business processes can account for up to **80%** loss in productivity.

Source: McKinsey Global Institute

Specialty contractors and other companies with technicians that perform reactive or preventative maintenance need to improve the efficiency and effectiveness of field work. These businesses include:

- HVAC, electrical, and plumbing contractors.
- Property managers.
- Residential builders, remodelers, and handymen.
- Roofing and landscaping.

Improving service management workflows

According to a recent Aberdeen report, “more companies have identified service as a way to drive recurring revenue streams.”¹ That has encouraged more competition in the industry, making it more important than ever to deliver the level of service customers expect. And one of the top pressures that organizations face is the demand for faster service.

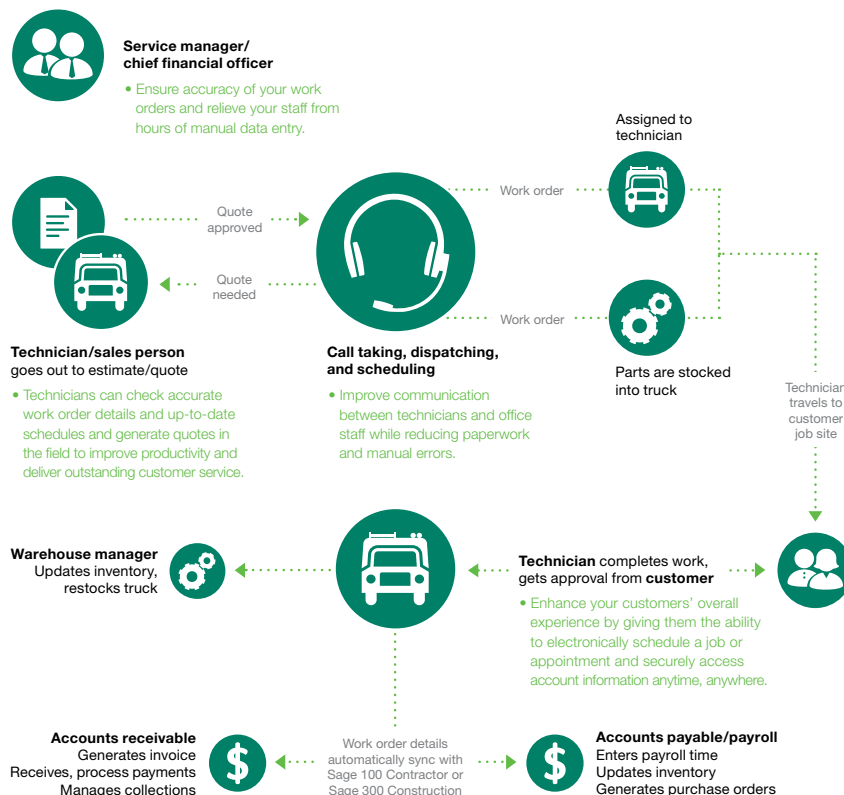
Many contractors rely on manual processes to manage service operations. As a result, technicians often don’t have access to critical information in the field, and office staff can’t get updated work order information when they need it. In addition, technicians often turn in incomplete work orders or their handwriting is illegible. This negatively impacts the productivity because office staff have to track down the technician to get the information they need before the work order can be entered into the system.

Typical service management tasks include:

- Managing and tracking jobs, work orders, and service level agreements (SLAs).
- Scheduling and assigning work to technicians.
- Maintaining inventory of parts.
- Ensuring trucks are properly stocked for service calls.
- Managing staff and subcontractors.
- Providing status reports.
- Monitoring work order profitability.
- Ensuring timely and proper billing.

75% of businesses identified customer demand for faster, improved service as a top pressure facing their service operation.

Source: Aberdeen



1 Pinder, Aly, “Service Mobility: The Right Technology for the Technician,” Aberdeen Report, July 2014.

Positive impact of mobile technology

To meet the customer demand for faster service, leading service organizations are focusing on mobility. There's been a huge rise in the adoption of mobile devices. A 2014 Sage survey found that 93% of contractors are already using mobile devices, and more than a third plan to increase usage next year. Increased mobility is improving efficiency and communications at these businesses, and 77% report that mobile devices have had a positive impact on organizational productivity.

But the use of mobile devices is also helping other areas of these businesses. According to the 2014 Sage SMB Survey on Mobile Devices,² the positive effects of mobile technology have been most keenly felt in the area of customer service for construction-related businesses. Seventy-five percent of respondents stated that client support has improved in their company since the adoption of mobile technology.

Leading companies recognize the important role that technicians play in successful service delivery and are seeking to equip them with mobile tools. In fact, 82% of companies named mobility as the top strategic initiative in a 2014 Aberdeen report.³

Advantages of automated service management

In today's economy, customers have more choice in where they do business—which means more competition for you—so keeping them happy is important. Delivering on-time quality service is one way to maintain or increase customer satisfaction. In order to stay competitive, service businesses must also embrace the ability to complete transactions anywhere, at any time.

Mobile service management solutions are helping to bridge the gap between office staff and field technicians. For example, mobile devices equipped with GPS enable service managers and dispatchers to keep tabs on the location of their technicians. Encryption tools on those devices can help protect sensitive information. It's also important that the company can choose to use all types of devices, including Android, Apple, and Windows.

Technicians who are equipped with mobile devices in the field have access to important site information needed to complete work orders faster. They can complete work orders and send them electronically back to the office, which reduces paperwork and administrative overhead. It also helps prevent issues due to incomplete or illegible work orders.

Mobile benefits

93% of construction-related businesses are already using mobile devices.

77% report that usage has had a positive impact on productivity.

75% say that client support has improved since the adoption of mobile.

82% of companies named mobility as the top strategic initiative in a 2014 Aberdeen report.³

Source: 2014 Sage Construction and Real Estate Survey and 2014 SMB Survey on Mobile Devices

² <http://na.sage.com/us/our-news/press-releases/08/mobility>
³ Ibid.

Using mobile service management solutions, contractors can effectively manage service operations. These solutions enable technicians to complete their work in less time and make fewer trips to the office by providing the real-time information they need in the field on any tablet or mobile device. Technicians can check accurate work order details, up-to-date schedules, and more to improve productivity and deliver outstanding customer service.

Office staff also benefit from the use of mobile solutions in the field. Data is entered one time (by the technician), which eliminates the risk of duplicate data entry errors. Office staff can access and use the information to reduce the time to invoice, order parts and restock inventory on a timely basis, and schedule appropriate follow-up calls.

Customers also enjoy an enhanced experience with the ability to self-serve. Using an online portal, clients can electronically request new work orders and access account information such as invoices, work order status, service request history, and previously serviced equipment.

In “Service mobility: The right technology for the technician,” Aberdeen found that top performing companies enjoyed better performance with mobility.

Characteristics of top performing companies vs followers

	Leaders	Followers
Workforce utilization	70%	49%
Service contract renewal rates	58%	30%
Employee satisfaction	65%	43%

Source: Aberdeen Group, July 2014

Benefits of automating your service operations

- Simplify service operations and reduce the time to invoice by tracking time, materials, billing amounts, and more from the field quickly and accurately.
- Improve communication between office staff and field technicians by capturing details like time, materials used, notes, and work order status in real time.
- Better manage potential new business with the ability to create, track, and follow up on quotes while on site with the customer.
- Enhance customer service by giving your clients the ability to take control of their account information and submit service requests anytime, anywhere.
- Reduce paperwork and administrative overhead by eliminating duplicate data entry or errors caused by misreading technician notes.

Get insight into service department operations

CEOs, owners, and service managers want to deliver excellent customer service and plan resources effectively to keep costs low. Unfortunately, they often can't get the information they need without going through accounting or another department.

Solutions that offer graphical tools, such as dashboards and dispatch boards, can help key stakeholders stay in the loop with the ability to see work orders, invoices, and upcoming tasks at a glance. Plus, dispatch can better manage employee schedules and ensure all customers are taken care of—whether it's reactive service or preventative maintenance. These tools allow dispatchers to:

- Pair technician skill sets with the right job.
- Ensure necessary parts and inventories are available for the job.
- Provide support to enable job completion on first visit.

View, complete, and take payment for work orders from the field

Additionally, contractors can gain more visibility by giving technicians the ability to enter work order information in real time. Office staff can make informed decisions with up-to-date progress and notes.

To get timely updates, it's also important to simplify the completion of work orders. Service management solutions can help technicians by populating work tickets with predefined work descriptions so documentation is professional for customer review and provides the right level of detail to the billing department.

Cash flow is always of utmost importance. Having the ability to collect payment on site, rather than having to go through the process of sending the work order back to the office and waiting through the billing cycle, helps you get paid faster. Using a mobile device, contractors can enable technicians to capture customer signatures when work is completed, take payment, and email receipts from the job site.

Dashboards can keep key stakeholders in the loop with the ability to see work orders, invoices, and upcoming tasks.

Increase the efficiency of service operations with the ability to track critical items in the field such as:



Assignments.



Client equipment.



Work orders.



Notes.



Purchase orders.



Electronic time card.

Allow customers to self-serve

A growing number of contractors are also giving their customers more control over service operations. With a customized self-service website, customers can request service and check work order status, without having to call your office staff. An effective service portal should allow customers to:

- Access a secure, customized self-service website to request service, check status, see account history, and more.
- Sign off on completed work orders with the field technician.
- See up-to-date status on all work orders, invoices, and more.

Conclusion

Contractors have reported from the field for years but are beginning to move away from the manual pen-and-paper methods. More contractors are using mobile technology to improve communications and bridge the gap between field technicians, office staff, and customers. With automated service management solutions, managers and technicians can get access to real-time information anytime, anywhere and increase the efficiency of service operations.

For more information, contact your Sage business partner or customer account manager at 800-858-7095. Find out how these solutions can help you improve service operations:

- Sage 300 Construction and Real Estate with Service Management
- Sage 100 Contractor with Service Receivables
- Sage Service Operations

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