



THE FUTURE OF FIELD SERVICE CUSTOMER SUPPORT

*Delivering Better Customer
Experiences through Technology*

Field Service CUSTOMER SUPPORT

Customer Demands HAVE CHANGED

How are you adapting and scaling to meet the changing expectations and demands of today's consumers?

Providing excellent customer service and support is critical to retaining customers and gaining referrals. As a field service professional, you already know that's a given. You or someone on your team has put a lot of thought and effort into developing procedures and processes to ensure you're delivering the level of service that your customers expect.

However, scaling those processes and procedures can be challenging. Not only do you have to scale to meet the demands of your business' growth, but you must also scale and evolve to meet changing customer expectations.



Changing EXPECTATIONS



The customer experience is the next competitive battleground.”

Jerry Gregoire, Dell

How Technology Has Changed Customer Expectations



In recent years, great support and service aren't just about whether or not you can deliver solutions skillfully. Today, you must also address customers' inquiries quickly, via their preferred device, at the time they want to contact you. The **Amazon Effect** — defined as the impact on traditional businesses due to Amazon's influence on changing shopping patterns and customer expectations — has begun to impact businesses outside of retail.

People transfer their experiences with companies like Amazon — expectations for immediacy and personalization — to a variety of shopping and service scenarios on and offline, for physical products and services alike.

Customer Demands When It Comes to Service and Support

Many expectations of today's customers are the same as previous generations of customers:

- Poor service drives people to buy from a competitor. The majority of Americans will cancel a purchase due to bad service, and 33 percent will consider switching providers after a single instance of poor service. (American Express)
- People will pay more for better service. Sixty-seven percent of customers say they will spend more for a better customer experience. (Salesforce)
- Customers want courteous treatment. Around 70 percent of buying experiences are based on how people feel about the service they receive. (McKinsey & Company)

While skill and courtesy still rank high with customers, technology has created a new set of demands, too.

- Customers want service agents to be aware of the sales interactions on their accounts. (Salesforce)
- People want to work with companies that they can trust with their personal data. (Salesforce)
- The majority of customers prefer tailored engagements based on past interactions and information. (Salesforce)

- People prefer speed — sometimes more than they value effectiveness. In fact, 33 percent would recommend a business that provides a quick response even if it's ineffective. Additionally, only 17 percent of customers would recommend a company that provided a slow-but-effective solution. (Nielsen-McKinsey)

Obviously, adding headcount and providing training programs to staff is no longer enough to keep pace with customer preferences. To meet the demands of 21st-century consumers, you must take advantage of innovation and utilize the right technology in your business.



Service Fusion

Technology Holds the ANSWERS FOR SUPPORT

Technology has changed customer expectations, and it can also transform your ability to deliver outstanding support and service.

If your field technicians are still using paper work orders and clipboards, you may find your competitors are a step ahead of you.

Field service management (FSM) software can help streamline customer support and increase productivity, in many cases, without additional headcount.

Let's explore how FSM can improve your company's support efforts.



Customer EXPERIENCES



Equip Employees to Serve Customers Quickly

As the studies have shown, people want to be served quickly, and a field service management platform can enable your team to serve with speed.

Here are a few examples of how field service management software helps you meet customer demands for quick answers.

How Technology Has Changed Customer Expectations

If you want to deliver best-in-class customer support, your team members need to know as much as possible about your clients. Knowing everything about each contact is impossible for even the most dedicated team member. Therefore, you've got to provide a centralized platform where anyone in the company, with proper authorization, can quickly capture and retrieve details about customers.

Remember, speed is important to today's buyer, and so is personalized service. They want to get answers quickly, and customers expect you to know about their account history. They don't want to rehash prior purchases or issues each time they call for service. And they don't want to explain their issue to five different people.



Field service management software with a robust customer management module allows you to:

- Create multiple customer contacts and service locations
- Define communication preferences and billing terms
- Store documents and images
- Capture and retain notes
- Protect personal customer data

Estimates and Jobs

An FSM platform can help your team speed through estimate and job creation in seconds thanks to pre-populated product and service line items. Customers don't have to wait hours or days to find out how much a service call will cost.

Call Tracking and Routing

Nobody likes playing phone tag when they need to speak with their service provider. Instead of adding headcount or hiring an answering service to field calls, businesses like yours can leverage call tracking and routing modules, such as ServiceCall.ai, to avoid calls rolling to voicemail.

Other benefits of call tracking and routing include:

- Smart scheduling to alert callers of your business hours
- Custom call routing rules to connect customers directly to techs
- The ability to view a customer's record upon answering the call
- New customer record creation when new prospects call
- Direct integration into FSM application software
- Visibility into inbound call lead sources for marketing purposes

In-Field Mobile App

All of the data and speed of an FSM shouldn't be limited to the employees in your office. Best-in-class solutions include in-field mobile apps that allow field technicians to access pertinent customer details right from their smartphones or tablets so they can walk confidently into a job with all the necessary information. These apps should help techs quickly and easily log information, too.



Make the Customer Feel Heard

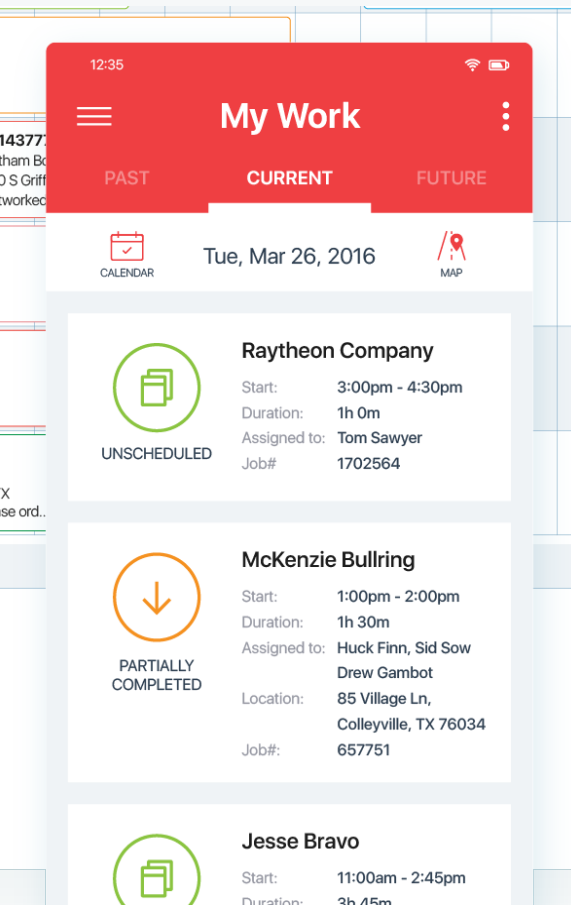
Making customers feel heard should be part of the day-to-day service delivery between your team and your clients. However, you can take things a step further by actively soliciting feedback from your customers and providing proactive notifications.

According to a [study by Microsoft](#), 77 percent of customers tend to view companies more favorably when they ask for and accept customer feedback. Additionally, Microsoft found that 68 percent of customers have a more favorable perception of companies that proactively contact them with customer service notifications. FSM can help your business meet these needs.

Surveys

You can use surveys in combination with your FSM's email functionality to ask customers for feedback. Types of surveys to consider include:

- Net Promoter Score Surveys
- Customer Satisfaction Surveys
- Surveys to Gauge Interest



Net Promoter Score (NPS) Surveys

An **NPS survey** consists of a single question phrased something like this: “On a scale of 0 (not at all likely) to 10 (extremely likely), how likely is that you would recommend [company/service] to a friend or colleague?”

Send these types of surveys to someone after the completion of a job or customer service interaction to understand where you stand with a customer.

Scores breakdown as follows:

- Your biggest fans, promoters, will give you a score of 9 or 10. These people are the ones whom you should ask for reviews and testimonials.
- Passives are people who are satisfied but not someone you would consider a promoter. They will respond with a score of 7 or 8. While you don’t need to panic, you should follow up with passives to find out what your team could do to move that score to a 9 or 10.
- Detractors, as you probably guessed, scored you anywhere between 0 and 6. A detractor is not a happy customer. They could be so unhappy that they discourage others from buying from you. If the customer is important to your business, a

senior-level employee should follow up personally to try to make things right.

Understanding your Net Promoter Score is essential. You want to leverage promoter enthusiasm by encouraging them to post reviews and provide testimonials. And you want to nip lousy word of mouth and losses in the bud by addressing the concerns of your detractors. After all, **50 percent of millennials will complain** about a brand on social media. Across the spectrum, though, **91 percent of unhappy customers** just go with a competitor rather than making a complaint.

Surveys to Gauge Interest in New Services/Changes to Services

You and your team may be excited about the possibility of adding a new service. Or maybe you’re considering changing an existing service. Before you make any big moves, take time to survey your customer base. Pay close attention to what they have to say — especially those who are your biggest fans.



Provide Additional Value

The right field service management solution will help you build strong bonds by giving you communication tools and value-added options that your customers will appreciate.

Email Reminders

An essential part of making customers feel heard is by communicating with them on the topics that matter most to them. Use your FSM technology to keep in touch with drip reminders throughout the year. For example, you can provide crucial seasonal service reminders and updates on your promotions and specials.

Ancillary Support Options

FSM providers that offer ancillary support options give you additional tools to provide perks to customers. These options can include integrations with extended warranties and service agreement providers — add-ons that give your clients peace of mind and improve customer retention.

For example, Service Fusion FSM software integrates with **JB Warranties**, the leading provider of Extended Warranties to the HVAC and Plumbing Industries. Contractors with both JB Warranties and Service Fusion accounts can choose from available warranties and manage extended warranty invoices and payments from within the FSM. Additionally, contractors who service these extended warranties can set up recurring maintenance jobs with customers. There's no need to switch platforms.





Be the Most Convenient Provider

The great thing about technology is that it can make things more convenient when you work with the right platform. Here are a few ways that FSM can make your business the most convenient service provider.



Text or Call Options

Did you know that over 78 percent of people surveyed wish they could have a **text conversation with a business**? If you're wondering why that is, look at the latest smartphone ownership stats. As of 2019, **81 percent of Americans own smartphones**, and around **50 percent of Google searches** occur on mobile devices.

In the digital age, people expect businesses to have an omni-channel presence. With an FSM that includes call and texting services, you can offer customers the option to text or call, making doing business with you more convenient for them.

Customer-facing Mobile App

The growth of smartphone users means that people often look to their mobile devices first when making a service appointment. If your FSM offers you the ability to build a customized mobile app, you've put convenience in the palms of your customers' hands.

When they can use an app to request service, get free estimates, view their history, and manage their own contact information, you've made it easy to do business with you.

Payment Method Options

A robust field service management platform should enable you to accept multiple payment methods — including online bill payment with a credit card. Fewer people write checks these days, and many younger consumers appreciate the ease of paying online.

Look for a solution that offers you a fully integrated payment platform that includes a free payment gateway and free data vault for the secure storage of credit card information.



Choose the FSM That IMPROVES SERVICE

How are you adapting and scaling to meet the changing expectations and demands of today's consumers?

As you assess different field service management software, explore how the platform helps you and your customers. The ideal solution should give you complete operational visibility, enable you to make smarter business decisions, and empower your team to provide excellent customer care and support.

What features should you look for in an FSM?



Customer SUPPORT & SERVICE



Must-Have Features in An FSM

Must-have support and service features include:

- Customer management
- Call tracking and routing options
- Email marketing
- Estimate and job creation
- Invoicing and payment management, including credit card processing
- Bi-directional text messaging
- Customer-facing personalized app options
- Customer web portal options
- In-field mobile app for technicians

- Integrated ancillary support options
- Dispatch & scheduling of one-time and recurring jobs

However, don't stop with what an FSM offers to your customers.

Look for features that benefit you and your team, too, such as:

- Quickbooks integration
- Project management
- Job costing
- Inventory management
- Custom documents
- GPS fleet tracking

DISCOVER



Service Fusion

Service Fusion provides the features you need to enable terrific customer experiences. When your business is organized, you can deliver fast, friendly service that earns your customers' loyalty. Request your free demo of Service Fusion today to see how we can help you gain complete operational visibility to make smarter business decisions.

[Request a Demo](#)



Service Fusion provides the features you need to enable terrific customer experiences. When your business is organized, you can deliver fast, friendly service that earns your customers' loyalty. [Request your free demo](#) of Service Fusion today to see how we can help you gain complete operational visibility to make smarter business decisions.

Discover
SERVICE FUSION

Request a Demo

Dispatch Views

Configuration

Batch Assign & Schedule

Dispatch Grid

Dispatch Map ^{NEW}

Fleet Tracking

Daily

Weekly

12 Hour Grid

24 Hour Grid

Time Shift

Time Shift

Set Filters

<

Fri, Apr 19th

>

7am

8am

9am

10am

11am

12pm

1pm

2pm

3pm

4pm

5pm

6pm

7pm

Robert Harris

16143777

XYZ Corporation Station

2453 W Forest Park Blvd

Networked reciprocal service-desk, focused heuristic website. Sunt volupta...

16143777

XYZ Corporation Station

2453 W Forest Park Blvd

Networked reciprocal service-desk, foc...

16143777

Raytheon Company

650 S Griffin St, Dallas, TX

Create multi-item purchase orders...

Enzo Marino

16143777

Jesse Bravo

650 S Griffin St, Dallas, TX

Networked reciprocal serv...

16143777

Stanstead Brothers

3005 N McDonald St

Networked reciprocal service-desk, focused heuristic website. Sunt voluptas quidem as.

Jeremy Macho

16143777

Corporation Station

W Forest Park Blvd

Networked reciprocal service-desk, focused heuristic w...

16143777

McKenzie Bulfinch & Sons

1234 Main Str Rd

Networked reciprocal service-desk...

16143777

Gotham Bookstore

650 S Griffin St, Dallas, TX

Networked reciprocal service-desk, focused heuristic website.

Paul Goalby

16143777

Raytheon Company

2453 W Forest Park Blvd

Networked reciprocal service-desk, focused heuristic.

Justin Lumb

16143777

XYZ Corporation Station

2453 W Forest Park Blvd

Networked reciprocal s...

16143777

XYZ Corporation Station

2453 W Forest Park Blvd

Networked reciprocal service-desk, foc...

16143777

Raytheon Company

650 S Griffin St, Dallas, TX

Create multi-item purchase orders...

Marko Silva

16143777

XYZ Corporation Station

2453 W Forest Park Blvd

Networked reciprocal service-desk, focused heuristic website. Sun...

16143777

Raytheon Company

650 S Griffin St, Dallas, TX

Create multi-item purchase ord...

Unscheduled 4

Unassigned 0

With Open PO's 0

Partially Completed 2

Paused 0

Marked For Follow Up 0

Jobs, Estimates

Nothing Select

Nothing Select

Nothing Select

Nothing Select

Set Filters

16143777

XYZ Corporation Station

2453 W Forest Park Blvd

Networked reciprocal ser

16143777

XYZ Corporation Station

2453 W Forest Park Blvd

Networked reciprocal serv

16143777

XYZ Corporation Station

2453 W Forest Park Blvd

Networked reciprocal ser

16143777

XYZ Corporation Station

2453 W Forest Park Blvd

Networked reciprocal ser



All-in-One

FSM SOFTWARE

Request a Demo



See for yourself why 3,000+ field service businesses choose Service Fusion to run their business every month. Request your free **Service Fusion demo**.

Contact
SERVICE FUSION

success@servicefusion.com

888-902-0304

www.servicefusion.com

Service Fusion

8605 Freeport Parkway #200

Irving, TX 75063