

Power up your field service and profits with **Automation**

by Robert Sombach

Focal Scale Company, a young but fast-growing scale dealership, has a problem. It can't keep up with its own success. Using Excel spreadsheets, white boards, sticky notes and fallible human memory to manage an expanding customer base just isn't working anymore. There have been mix-ups in scheduling, inventory gone astray, slow-downs in responses to customer calls. The company's stellar reputation for service is starting to slip.

The company is hypothetical, the situation all too real. As a provider of service management software (Miracle Service), I have the satisfaction of helping turn such situations around.

Sooner or later, any firm that has not yet automated its field service operations will run into trouble. The good news is that automation is much easier than many dealers realize and the productivity gains are huge. Automation software can smooth and improve every aspect of the servicing business—from getting technicians to the right place with the right parts on time, to managing inspection schedules to managing contracts, inventory, billing and follow up. Plus, you get easy access to data on how the business is performing—information essential for planning, management and staying competitive.

Streamlining the service call

Let's look how an automated system can improve service calls. When the customer phones in about a problem, dispatch has instant access to a wealth

of information. The customer's profile, equipment, service history, contract details, alerts, SLA's, service bulletins and calibration scheduling due—all show up on screen at touch of a key. Such information allows the dispatcher to respond to clients knowledgeably and determine action needed efficiently and fast.

The next step, scheduling the technician, is streamlined too. Another mouse-click produces a visual display of technicians' schedules to see who is available to do the job. A work order with multiple tasks and multiple technicians can be generated in seconds, then printed, e-mailed, or sent directly to their mobile device. Both the technician and the customer can receive the work order right away and the dispatcher can monitor all service calls in progress.

Taking it a step further, systems that allow customers to place orders or open service calls directly through a web portal not only provide more service, but also boost efficiency. When customers can directly request service, order parts, view jobs and access their completed certificates anytime through a secure on-line portal, dispatch volumes go down and response time speeds up.

Good automated systems are proactive too, alerting your field service department about calibrations due for each customer's equipment. When performing on-site calibrations if technicians are able to input data from their mobile device directly into an electronic calibration form linked to your centralized database, it will forever eliminate the need to

manually create, file, store, retrieve and print certificates.

These are just a few of the tools that help ensure:

- Improved first-call resolution
- Increased number of jobs handled per day
- Fewer errors
- Full customer satisfaction
- A service department that stands out from the competition

An automated service management solution that also tracks inventory, monitors calibration next-visit scheduling and contract renewals and handles other kinds of invoicing will further improve service department performance.

Choosing a Software Partner

Robert Detuncq, President of Houston Scale, a full-service Industrial scale company knew that it was time to find a partner and software system to help Houston Scale maintain their high level of service and become more efficient in their processes. "We came to a critical head in the road and tried a few different software systems to support our extensive scheduling needs, but none of those systems performed the way we needed them to, incorporating all of their scheduling variables. After extensive research and review of various systems, we choose to move ahead with the Miracle Service system because we felt it offered all of the features and requirements we needed. Keeping up with individual pieces of equipment, keeping up with unique customer requirements, unique customer

notes for timing or weight needs; with Miracle Service we'll be able to note all of this information directly within each customer file. This will make a tremendous impact on our productivity. Plus, the savings in paper, printing, and hardware, by moving to Miracle Service and eliminating the need to print out reports during each client visit, will be significant."

Getting started

So why do some firms delay automation? They fear it will take too much time. But implementing a service management software solution doesn't have to be complicated. Many of our customers are up and running and using the system in a very short period of time. The key is a system that is flexible, allowing you to add on functionality as you need it, to grow the software as your business grows. For example, if you have an accounting program that works well for you, you shouldn't have to change it. By using a service management software that integrates with your existing accounting system, you eliminate the extra cost and learning curve involved in

Companies that have deployed field service solutions have realized:

- greater worker productivity*
- greater customer satisfaction/retention*
- improved overall profitability*
- increases in service revenues*

taking on a new accounting program. The switch to automation will be that much faster and easier. And you should be able to count on help from your automation software provider. All good automation software companies will try to ease your transition—from importing your data to on-going training and support.

Is the investment worth it?

You don't have to buy a large, complex software package to get the benefits of automation. An automated software solution tailored to your needs is less costly

than you think and can deliver a quick R.O.I. For example with Miracle Service, you could see savings of \$700 per month per technician. Even factoring in the cost of the software, any on-going maintenance costs and staff training time, an R.O.I. of less than six months is very common. After that, it's all money in your pocket.

As Robert Detuncq says: "Since founding Houston scale in 2004 I have always looked to use technology to improve our customer service. It's the best way to stay on top of things and keep on growing."

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