



## **Preparing Field Service Engineers for Exceptional Customer Service**

**UTILIZING MOBILE TOOLS TO GET THE JOB  
DONE RIGHT**



## The Age of the Customer

In 2011, Forrester said we had entered the 'Age of the Customer' - where consumers are more empowered than ever because they can access information about products and services through mobile technology, social media and the Internet. Companies must be ready to equip those customers with the information they need. Knowledgeable field service engineers, techs and agents armed with the right tools for their jobs can ensure delightful, lasting customer relationships.

**“Customers want to feel empowered to get a question answered or an issue resolved at any point during their engagement journey with a company, and expect their service interactions to be painless.” - Forrester “The Future Of Customer Service“ 2014**

The key to capturing customer satisfaction is threefold. Companies must build the right team of field service agents with specific expertise for the job, provide information about additional products and services their customers might enjoy and mobile tools that make both the engineer and the customer experience frictionless.

There are **five** components to building the right team. Each of these steps, with strategic processes in place, will ensure your front-line field agents provide customers with the best possible service with a lasting relationship. Each of these components are successful with the help of mobile tools.

# I. Hiring The Right People

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"The secret of my success is that we have gone to exceptional lengths to hire the best people in the world." - Steve Jobs

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Field service jobs are stressful, tough and exhausting. Assisting a dissatisfied customer while remaining positive can be challenging and every engineer isn't equipped for a customer-facing position. Managers must seek engineers who are customer-focused, charismatic, helpful and communicative. FieldAware calls this the three C's to hiring customer-focused field engineers: competence, courtesy and communication.

**Competence.** Competency when helping a customer is a key requirement for finding the right engineer for the field. Competency is not just having the technical knowledge to solve complex problems, but also connecting with your customers. Customers expect the engineer deliver to a technical solution; a competent engineer will go out of his or her way to build a relationship with the client.

**Courtesy.** Field service personnel must practice courtesy with customers and suppliers at all times. They are the representatives of your company. When a field service engineer is onsite with a customer, they must demonstrate professionalism at all times to establish a positive relationship. Being courteous goes a long way when an unexpected issue arises, and these skills provide the customer with a positive experience and image of your company. Considering the wants and needs of your customer is key to establishing a solid foundation.

Additionally, it's important to create a seamless operation for an engineer so they can focus on delighting the customer. It's easy to become stressed in the workplace, but it is important that field service engineers be patient and attentive with their customers.



**Communication.** This quality is essential for the field service engineers. Customers want to know what's going on; whether their issue is being solved, how to handle situations in the future and so much more. It is vital to hire an engineer who understands the importance of effective communication.

Engineers with strong communication skills not only improve the relationship with the customer, but also keep internal communication aligned as well. Managers count on these technicians to be honest about processes and seek ways in which they can be improved upon to set employees up for success. Engineers with strong social skills also have more opportunities for upward mobility to become leaders and mentors for others in the company.

Even though finding the perfect engineer with these three strong qualities can be difficult, retaining them may pose an even bigger challenge. Keeping these employees engaged is also an important step in order for them to have a positive experience at work and provide the best customer service.



## II. Delighting Your Engineers

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"A good manager is a man who isn't worried about his own career, but rather the careers of those who work for him." - H. S. M Burns

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According to a study by Kissmetrics, there are a number of ways employees become unhappy in the workplace: overwhelming or conflicting job demands, lack of information or appropriate resources to do the job correctly, lack of social support from supervisors, no feedback on personal performance and little participation in decision making. All of these issues can decrease the motivation and success of employees, which directly correlates to the happiness of the customers.

It's hard to believe, but only 23% of organizations have a formal plan with distinct initiatives to improve employee engagement according to Aberdeen Group. This low percentage is not indicative of how managers can improve culture or retention.

Managers need to invest in employees and create processes that increase on-the-job satisfaction and programs to help improve personal health and happiness.

Many companies are implementing employee management systems to help them improve processes that impact employee experiences. This system involves, but is not exclusive to:



Recruiting



Hiring



Training



Job  
Design



Performance  
Evaluation



Personal  
records



To ensure employee happiness, managers need to remove barriers that make it difficult for engineers to do their jobs in the field. They must develop an employee engagement program to continuously receive feedback, monitor successes and failures, manage areas that need improvement and provide encouragement and constructive criticism to help employees mature and grow.



During company-wide meetings, managers should acknowledge employees who are rising to the top and exceeding expectations. Let them know their hard work is acknowledged by the leadership team. Aside from the engagement program, incentive programs are another way to encourage motivation. Rewarding performance is always a great way to encourage engineers to provide the best service to your customers.

### III. Training for Success

Proper job training is the best thing you can provide to make sure your engineers have a positive experience when they're out in the field. An effective method is to put the engineers through a program that sets up potential scenarios while helping customers and documenting the reactions. This helps expose the engineers to possible unknown situations that could occur and provide them with tools to address the issues. Engineers of any skill-level can improve with the proper tools, making the job easier.

Training programs should include internal processes driven by management, but also external sessions where the engineers can receive an accredited certification. A mixture of both is the perfect training program - it reinforces company and department values and objectives, while also providing engineers with the certifications that bolster their expertise and confidence. Well-trained engineers will be of greater value than their service manager when they can pass their knowledge and expertise on to the customer, reinforcing the company's expert positioning.

“The best teacher is not the one who knows most but the one who is most capable of reducing knowledge to that simple compound of the obvious and wonderful.” - H. L. Mencken



According to Aberdeen Group, organizations that offer mentoring programs see a 52% increase in service revenue. It is extremely important to have constant mentoring and communication between service engineers and management. Engineers who have a manager to confide in and communicate frequently with to discuss strengths, weaknesses, feedback, goals and more will enjoy greater on-the-job success.

### **Improving First Time Fix Rate**

Depending on how large the company, management can enforce weekly, biweekly or monthly meetings with engineers to receive feedback, explore new ways of doing the job and receive updates on the company.

First time fix rate is an important, but sometimes forgotten goal for many field service managers. With an organization's average first time fix rate hovering around 77%, field technicians must conduct at least one follow up visit for 23% of all service calls. This affects costs, asset availability, and in some cases, response time according to The Service Council - all factors that impact customer satisfaction.

Aberdeen reports that the top complaint of 57% of customers is that their service issues were not resolved on the first visit. No matter how competent the engineer, if the service department does not provide them with the right information, parts and tools or schedule the appropriate length of service time, customers' impressions of their service provider will suffer. Aberdeen continues to say that mobile tools enabled organizations to increase their first time fix rate to 89% and 92% response time compliance.

According to Service Power, here's how they did it:

- Improved training - both on the job and with better field service management tools
- Improved diagnostics at the initial call level so that engineers will be prepared once they arrive on site
- Improved parts inventory access in the field (getting the right parts to the right job)
- Smarter scheduling based on job route, part availability or customer availability



## IV. Developing Technology for the Best Service

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“Apps add a weapon to your armory when you need to get in direct communication with your customer.” - Tom Ferrell

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According to Aberdeen Group, eight out of ten top performers were able to attain their service revenue goals in 2014. That’s a pretty impressive metric. The same top performers also cultivated an environment of innovation within their service departments by focusing on meeting the needs of their customers. But how did these service organizations reach these results?

### **With the use of mobile technology.**

Field service managers are not strangers to mobile. In fact, according to a study by Field Service Digital, 84% of respondents use some sort of mobile application within their organizations to automate workload. Seventy-six percent invest in field service management software with the hope that mobile technology will increase customer service.

Despite the high numbers, these companies are not using mobility to its full potential. As more organizations adopt field service management technology, they will start realizing the full spectrum of benefits a technology solution can provide.

According to Beecham Research, Service Power and Ideal Life, the ROI for adopting a field service technology is staggering:

- FSM software tools increased efficiency by 12%
- Daily work orders increased by 95% per technician
- Companies saw \$7.57 ROI for every \$1 spent
- Remote monitoring and diagnostics reduce service visits by 60%
- Mobile tools enable 89% first time fix rates and 92% response time compliance



## **Case Study: DISH Network Customer Service**

Though one of nation's leading satellite providers, DISH network was incredibly behind other industry leaders when it came to optimizing internal processes for improved efficiency. With more than 16,000 service department team members spread across the country, their paper-based field processes and bring your own device (BYOD) approach to one-on-one communications was seriously impeding field efficiency, engineer satisfaction and customer service.

They knew they needed a better approach to managing their large mobile workforce. "Our technicians didn't have the tools they needed to be successful and confident in the field, and the back office was burdened with manual tasks. It was time to make a change." - Erik Carlson, executive vice president at DISH.

Over a seven month period, DISH worked with technology providers to develop a mobile solution that would integrate with its existing backend systems for billing, CRM and workforce management. They rolled the product out to a beta employee group of about 500 technicians, made refinements and then expanded it to a larger group of employees.

### **DISH's results:**

- **Technicians could now deliver 1-hour appointment windows with 96% accuracy**
- **Due to a significant increase in dispatcher productivity, the company has increased its technician-to-dispatcher ratio by more than 200%, cutting exorbitant payroll costs**
- **Reduced number of miles driven by each technician by 5%**
- **Increased technician productivity by more than 10%**

## V. Engaging Your Customers Forever

Once a customer, always a customer? There's no guarantee if you don't cultivate the relationship. After the engineer has helped a customer, programs should be set up to continuously ensure the customers' satisfaction with your employees and company. Some initiatives include:

- Scheduling follow-up service appointments
- Providing updates on new software, products, company news
- Using notifications to push special offers and deals
- Providing customers with satisfaction surveys

Another way to provide effective customer service is to offer customers tutorials and instructions in an easy to consume digital format on how to deal with small issues on their own. Customers want to solve problems and feel empowered to make decisions and this provides them with a way to do so. They also avoid waiting on customer service departments to schedule a service appointment. Instead of having to conform to your engineer's service availability, you provide a solution that fits their needs.

## Conclusion

Each of the five components of building a strong team: hiring, delighting, training, developing and engaging, ensure your department's success. Mobile tools are the most effective way to achieve successful results with your field service teams and your customers. Your frontline service engineers are your biggest and most expensive asset. When they're out in the field, the engineers represent the company's image and become the direct form of communication to the customers, so treat them like you would treat your real customers. By strategically creating processes for each step, employees will be encouraged to perform to the best of their ability and provide customers with the best service who will share their success with others around them.





## stablekernel

Founded by Joe Conway, author of the best-selling iOS Programming: The Big Nerd Ranch Guide, stablekernel is an Atlanta-based mobile app company offering end-to-end development services to craft smartly-designed software that connects brands directly with their users – across tablets, smartphones, desktops, wearables and the Internet of Things. Our team of developers takes clients from strategy through design, development and deployment, ensuring timely delivery of the highest quality apps

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