5 Key System Capabilities for **Commercial HVAC Companies** to Engage Efficiently with **Customers**

a Velosio® ebook

IBISWorld projects revenue in the HVAC services franchise industry will have grown by 4.8% from 2015 to 2025...but margins will shrink by the same percentage over that same time period.[1]

Trends such as these underscore how Commercial HVAC companies face an opportunity to expand their business but also the challenge of operating profitably. This presents a delicate balancing act when engaging with customers. Taking care of customer needs must come first—otherwise they will take their business elsewhere. But at the same time, to operate profitably, HVAC companies need to service their customers efficiently.

The best way to achieve this balance is by utilizing an enterprise customer engagement platform that integrates field service data—not only with marketing and sales activity, but also financial data. This makes it possible to centralize and synchronize customer information with operational information.

HVAC firms can then make the information available in real time to back-office personnel as well as technicians in the field. Armed with accurate and complete information on customers—their HVAC systems and their account activity—the company then has the means to meet customer needs while also operating profitably.

To help your HVAC firm identify a customer engagement platform that will meet your operational requirements, here are **five key capabilities** to look for in the solutions you consider:

1. Streamlined Scheduling and Dispatching

Service managers and dispatchers need to optimize the utilization of their field technicians while also making sure they prioritize and respond as quickly as possible to urgent customer requests. Managing field teams to function efficiently requires balancing the mission to minimize travel with the need to identify the right skill set for each job. For companies where workloads fluctuate seasonally, solving this challenge can be a major headache.

A customer engagement platform helps by enabling managers and dispatchers to know the status of the jobs so they know when they can schedule technicians for their next job. Mapping tools help visualize where all technicians are located in real time and in relation to open job assignments that need to be scheduled.

Field service teams also benefit from near real-time syncing between field devices and the central system, so technicians can submit updates and reports offline when working in rooms or areas without Internet access. Technicians can also quickly update their status as to whether they are traveling to a site, onsite working, or have just completed a job.

2. Reporting Analytics

While customer engagement managers can often solve urgent incident problems with their instincts, major changes to the overall way the field services department operates require access to analytical data. Without reports, it's difficult to identify historical trends and forecast future requirements. The workforce not only needs to expand during peak busy times—such as quarterly inspections every January, April, July and October—but also be reassigned to other tasks during slower time periods.

Managers also need to constantly balance resources vs. expected customer needs in light of contract renewals. These require key performance indicators that delineate the number of actual service incidents, the time spent on customer contracts, and the cost of technicians for each customer—in comparison to estimates at the beginning of the contract.

A customer engagement platform takes on this challenge by generating dashboards to forecast resource requirements during heavy and light months based on scheduled service visits and historical data on unplanned service incidents. Managers can anticipate technician requirements by the week, month, quarter and year.

The platform can also integrate with contract renewals so field service can get a jump on customer contracts well in advance of when they expire to determine how service activity over the past year compares to the estimated forecast. This helps identify which contracts will require an increase in service time and which ones will require less time.

3. Asset Management

Another challenging area of customer engagements is managing assets. Managers not only need an accurate inventory of complete systems, but also replacement parts and all the tools and systems technicians need to do their jobs. And when technicians are onsite, they need immediate access to asset reference materials, service histories, and service contracts. It's also vital to track customer and technician contact information to facilitate the resolution of any asset issues that may arise.

Customer engagement platforms take on this challenge by tracking equipment model and serial numbers and attaching the information to service incidents—starting with intake calls right through technicians arriving onsite. Before technicians begin servicing assets, they can view asset history, which includes previous service notes, parts ordered, and repairs. This lets them manage their time efficiently and finish service calls sooner.

Service teams can also run reports to identify parts that need maintenance and to identify when assets are still under manufacturer warranties. Whether it's managing maintenance projects or new construction, the service team has one central location to store operation and maintenance manuals, schematics, plans, system specs, and a rundown of the services to provide—all easily accessible by the home office and technicians in the field.

4. Streamlined Work Order Process

When customer engagement teams run their operations using paper-based systems or disparate software solutions that function in isolation, all the data needs to be rekeyed into a central system. This leads to data entry errors that cause delays in sending invoices and mistakes in managing service contracts. It's also difficult for management to run real-time reports on field-service activities.

By utilizing a customer engagement platform, field-service data is automatically integrated with other enterprise systems such as ERP and CRM. This also streamlines work orders as data fields are automatically populated for field technicians on the digital forms they access from their devices.
And when technicians finish jobs, they can quickly complete work orders on their devices, capture electronic signatures from customers, confirm customer email addresses, and submit work orders simultaneously—to customers via email and to the home office for processing.

5. Easy for Field Technicians to Use

Field technicians face constant pressure to complete as many jobs per day as possible. And while they're onsite providing services, you want them completely focused on their assigned tasks and interacting with customers.

The last thing you need is for your field technicians to waste time interacting with their mobile devices and entering service incident data. Most technicians do not have sophisticated data entry skills—it's not their core expertise. The size of their mobile device may also require pinpoint keystrokes that are prone to mistakes. And they may not have reliable network connections in some equipment locations.

A customer engagement platform solves this challenge leveraging device cameras to capture serial numbers and model numbers by scanning equipment QR codes and bar codes. Customer engagement platforms can also auto-populate work orders to make life a little easier for technicians. They can work in both online and offload mode, and just click on checkboxes rather than keying in all the data.

In addition to generating more accurate information on work orders and invoices, this gives technicians more time to focus on their tasks and your customers. And that leads to better service incident results and more satisfied customers.

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Centralized Customer Engagement Data Accessible to Entire Company

To consolidate customer engagement processes and data into one centralized system, many Commercial HVAC companies have turned to Microsoft Dynamics. Based in the cloud, the system is easily accessed from company offices as well as by technicians on the road and support staff working from home offices.

With all data and processes in one place, HVAC companies gain efficiencies in field technician scheduling, dispatching, asset management, and work order processing. Field technicians find Dynamics easy to use on any device, and service managers can run reports to analyze past performance on customer contracts and forecast future demand for technicians during peak and off-peak activity periods.

Dynamics also enables service managers to assign resources and coordinate system deliveries to synchronize technician availability with equipment arrivals. Managers can prioritize which customer tasks warrant the highest priority while managing technician schedules and making adjustments as emergencies arise. And technicians can track schedules remotely and easily document break-fix and maintenance tasks.

From a reporting standpoint, Dynamics offers dashboards that provide visibility into all operations so the company can take corrective actions before issues impact customers. This includes forecasting resource and equipment availability as business models change the mix of new construction versus break-fix and maintenance subscriptions.

Another key benefit is the integration between Dynamics and other Microsoft solutions. Whether it's ERP, the Office suite, Outlook email, Teams, or Power BI, data flows automatically across all applications. End-users can easily access customer engagement data and files from the other Microsoft applications. This fosters internal collaboration and enables the company to respond quickly to customer inquiries.

For more information on Microsoft Dynamics and to learn how Velosio helps Commercial HVAC firms manage customer engagements more efficiently while operating profitably, schedule a free demo today.

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