

# Key Information to Have for Convincing Your Boss You Need Field Service Management Software



If you're a small business field service management operation looking to either (a) grow or (b) operate more effectively, one typically successful avenue for doing either is through the use of FSM software. But, as a small business, can you afford it? And better yet, why should you pay for it? We've worked with many SMB FSOs who faced this exact challenge: they understand the benefits of FSM software (integration, customer relationships, shared data, etc.), but they can't quite justify the cost to the financial decision-maker(s) in the company. As a result, the idea to use FSM software doesn't advance.

We want to help you advance the idea and start being a more effective, revenue-growth-driven FSO. What information will you need to convince your decision-makers that you need FSM software?

## Key Information to Have for Convincing Your Boss You Need FSM Software

**1. Pain Points:** Go talk to other employees and to the technicians. Determine what their pain points are. Make a list of them, and then organize the pain points into a chart or bar graph so that people can clearly see what the biggest areas are ('poor communication' or 'too far to inventory,' for example). Having actionable data from employees and technicians on what's preventing them from greater success is a good starting point.

**2. Cost Data:** This is probably going to be the most important piece of information you have. Let's consider a potential example.

Let's say you run a small business HVAC company and have a mid-size client. Your client's cooling system (i.e. AC) breaks in July. The client has 500 employees on site, and now they can't get anything done and most are leaving for the day. Managers in the company are getting upset not knowing where their people are. The client calls you and needs someone there immediately. You send someone quickly because you know this is an important job and client. Unfortunately, in the chaos around the broken AC, you send a technician in the wrong type of truck. It doesn't have the equipment he needs to do the job. So he gets to the site, talks to the client, and realizes what the AC problem is ... but he can't fix it. He has to drive that truck back to headquarters, get another truck, and make sure he has the right parts. Now instead of 90 minutes with a broken cooling system, this company is going on 3-4 hours. They are not happy. We've even seen situations where the technician is under so much pressure that he absentmindedly goes back a second time -- with the wrong tools. Now there's a need for a third trip!

In this situation, the client is unhappy. Your management team at your FSO is unhappy. Your other clients are unhappy (because their appointments were moved). In short, almost everyone is unhappy.



Now, this example may not represent your actual business but the idea is the same. Sometimes you have issues with communication, equipment, inventory, scheduling, or something else. Multiple visits occur. In cases like this, you are essentially spending money on these clients now, instead of making money from them. Having better system integration -- which FSM software provides -- can help solve these problems. And having the data for what these mishaps cost will go a long way toward convincing your decision-maker(s) of the need for FSM software.

**3. Functionalities and Features of the FSM Software You're Considering:** Be prepared to run down the features of the FSM software tools. Be prepared to talk about integration with existing resources. If your company uses Outlook and the FSM software you're considering can really only integrate with Google Mail, well, that's a problem. Know the features, know the integrations, and know the questions that might be asked by your decision-makers.

**4. Data on Customer Experience:** One of the primary benefits of FSM software is that it improves customer experience and customer relationship-building. Have data on what that can mean to your bottom line and revenue growth. If you need some ideas here, [contact us](#). We can provide you with some resources on FSOs who leveraged great customer experience into growth.

**5. Data on Referral Engines:** More effective integration means more effective use of on-site time for technicians, which gives them the opportunity to 'up-sell' other services you offer to the client. It also allows them time for relationship-building themselves, which helps with referrals. Referrals ultimately drive most small business FSOs forward, so having information on the importance of referral is key here.

### Here's the full checklist to help convince your boss about the need for FSM software:

1. Pain Points
2. Cost Data
3. Functionalities and Features of the FSM Software You're Considering
4. Data on Customer Experience
5. Data on Referral Engines

Be visual, be specific, and be compelling. You can do this!

If you have any questions or need specific resources to help guide or begin the discussion, please feel free to [contact us](#).

