



Kickstart Your Marketing With Field Service Software



One of the bigger challenges of being a small business field service shop is marketing yourself. Most (not all) small business FSOs tend to operate in a specific region, and there may be “major players” (i.e. big or enterprise-level businesses) within that same sector. As a smaller company, how do you compete? Enterprise-level businesses can afford to spend (potentially) millions on marketing and getting their name out, and you might not be able to. Are there other, more cost-effective approaches to improving your brand’s visibility and thus, booking more clients?

Of course there are.

We’re not specifically talking about the whole idea of “disruption” in this post, because while we want to help you capitalize more on your regional market share, we don’t think you need to topple or disrupt a major player in your area in order to do so. But there is a core tenet of disruption that’s relevant here. Most large companies -- i.e. an enterprise-type FSO -- have between 9 and 14 layers between the technicians and the ultimate decision-maker (normally the CEO or President). If you’ve ever worked in a company with a lot of different layers, you know what can happen. The decision-making is slower, and not everyone is always clear on what should be the next priority. It can become like a big game of telephone.

Small businesses often don’t have this problem due to the fact that they have less employees. But if they don’t have a way to organize themselves smartly and push out a message to potential clients, other problems are going to arise.

This brings us to field service management (FSM) software. That’s what we do. We actually just rolled out a new update to our FSM software system in early October, and some of the updates -- and the overall functionality of the software -- can help you with marketing, driving leads, and sales. Let’s run through a few of these concepts.





CRM

We operate as a full-service CRM if you choose to use the software in that way, and you can tweak it to match your specific business needs. Within the CRM, you can manage customer communication (i.e. marketing channels), set notes and reminders, see detailed customer data, and access the customer web portal. In short: it's hard to do effective marketing if you're not powered by a strong CRM because your communication with and tracking of clients isn't well-catalogued within one system. An effective CRM helps streamline and organize your business, and that helps with more consistent marketing.



Service Agreements

Here's the dirty little secret of most FSO work: standard marketing is great and all, but you get the most bang for your buck by consistently delivering quality customer service. Great customer service drives referrals and retained clients, which, in turn, drives revenue. Our service agreements solution was designed with this idea in mind. The paperwork, SLA, warranty, and contract management side is always a hassle for the client (and oftentimes for the FSO), so we set out to remove that. This is as hassle-free as it gets: SLA/warranty/contract management, automated scheduling, and automated pricing. We also just added an enhancement where your clients can now apply payment directly to invoices instead of to accounts, allowing for payments toward the most recent invoices and partial payments on accounts that align with the invoices.



Scheduling and Routing Optimization

Again, this is improving customer experience in the name of improving marketing. When your technicians are routed more efficiently, they can see more clients in a week which amounts to more revenue. (They're also less stressed driving around all week, but that's more of an intangible benefit.) We've enhanced our scheduling and routing options to bring our partners/clients closer to a 90% or higher first-time fix. You can now route and optimize routes by specific technicians. On the schedule board, "route assistance" will now rearrange routes to be fully optimized according to the destinations scheduled. If your technicians are able to visit more clients in a day, logic tells you that these clients now have shorter wait times. Shorter wait times means happier clients, and a happy client is a loyal client.



Inventory Tracking

Nothing annoys a client more than a technician showing up with the wrong parts and having to get back in their truck, go get the parts, and return to the client site much later. Scenarios like this totally defeat first-time fix, and with consistently annoyed clients, you might not get that business back. So, we've maximized our inventory tracking solutions in recent months. First, we offer mobile access, an audit trail, automatic adjustments based on purchasing or use in-field, and purchasing control features. You can also get desktop alerts when inventory is being removed. We also added in a barcode scanning feature that now supports all forms of writing. Any form of barcode will now result in that product being added to the application.



Mobile

In terms of our own marketing here at Optsy, one of our biggest value-adds is that we've always been mobile-first. Back in October 2014, the Earth passed the level of "more phones than human beings." Almost regardless of which area of the world you do business in now, people aren't leaving their home without their phones. Mobile is everything -- or, at least until virtual reality or AI becomes everything. We want to make sure you can work with your clients in a mobile-first way. Allow them to easily contact you -- and you solve problems for them -- from their phones. That's how a lot of clients will choose to conduct business, so let's not run them in circles and ask them to go sit at a desktop in order to complete a task. Mobile-first is crucial for marketing because you're saying to customers/clients, "Hey, we care about you, and we know your time is valuable. So, we want to give you this option that won't be time-consuming." Plus, within our software, you can communicate/push messages to customers directly to their listed mobile number.



QuickBooks Integration

For SMBs, the QuickBooks market share is about 80 percent. There's a good chance that 4 in 5 of you may be using QuickBooks for your financials. We offer full (and customizable) integration with QuickBooks, and we just added a new feature there. For tax purposes, there are no longer penny rounding issues. This is less about marketing and more about taking control of your spending.



Overall Integration

Earlier, we talked about being better-organized and honing better decision-making skills as a key way to take some market share from a bigger competitor in your area. The overall concept with any FSM software program is that it allows you to do just that because it integrates all the different parts of your FSO. Now scheduling, inventory, customer information, and QuickBooks all reside within the same system. This helps with information transparency (more people on your team know what's happening and when), and it allows the different aspects you need to run your business to "speak" to each other. It's crucial to be on-point when pushing out messages to potential customers, and it's crucial to have everything together so that you're organized and getting that first-time fix (and **quick invoicing for cash flow**) when you deal with customers.