

The 5 Hurdles to Engaging Technicians in Business Development and How to Overcome Them

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Imagine you overhear the conversation between two service managers talking about the business development potential of their field service team. It might go something like this: *“The best salespeople we have aren’t sales people at all – they are our field service technicians,”* says one. *“You’re right,”* says the other. *“Customers will listen to our service techs long before they’ll listen to any of our salespeople. In fact, if our service technicians would only sell more, we wouldn’t need our salespeople!”*

The fact that many service managers agree with this sentiment is not a surprise. Field service technicians have a special relationship with their customers based on a high level of trust. What is surprising is that those same service managers admit that, despite the potential business development opportunity, they are not fully capitalizing on the unique relationships that their service people have – they are only scratching the surface when it comes to new business development.

This is unfortunate for both the service firm and the customer. When the service firm does not fully leverage the special relationships that their service technicians have, they are missing a tremendous opportunity to grow their business, reduce competition and increase customer satisfaction levels. On the other hand, the

customer is being denied the opportunity to run their plant or facility better. The customer is not benefiting fully from the knowledge and expertise of the service technician.

So how does a forward thinking service organization increase revenues while improving the service they provide to their customers? The most obvious answer is simply to teach the service technician how to sell. The logic goes like this: *“By teaching our field service technicians how to sell, we will be able to take advantage of our technicians’ customer relationships to build revenue and profitability.”*

Is this really a viable strategy? The actual results that have been experienced by many service companies suggest that the answer is not as simple as it may seem. Those firms that we have spoken with who have trained their service technicians to sell report mixed results and any improvement in business development appears to be short lived.

This does not mean that involving field service technicians in your firm’s business development strategy is a poor strategy. We know it can be a very viable strategy, one that can set your firm apart from your competitors. You just need to recognize and address some fundamental factors that can sabotage your efforts.

We have worked for many years with field service technicians and field engineers to help them increase the value they offer their customers. As a result of this work, we have identified five key hurdles that negatively impact the service technicians' effectiveness in contributing to the firm's business growth. In this article, we will discuss these hurdles and what you can do about them to ensure successfully involving field service technicians in your business development strategy.

Hurdle # 1: The Salesperson Paradox – “The harder I sell, the less effective I am.”

Customers trust the service technician to give them objective advice based on their knowledge and experience. Unlike salespeople who are compensated for what they sell, service people are compensated for what they know and using that knowledge to do their job well – installing, fixing or maintaining things. They are viewed as honest brokers – “telling it like it is” with no hidden agendas. It would seem natural that, if they just put a little more effort in selling to those trusting customers, then they will be instrumental in building more revenues and profits.

The paradox, however, is that the harder the technician tries to sell to the customer, the less effective they will be in building new business. The reason is that the moment the service technician starts to “sell”, he/she transcends that bond of trust that has been forged with the customer. Regardless of how genuine the service technician is, the very reason the customer trusted the service technician in the first place – the fact that they aren't out to sell them anything – is suddenly no longer the basis of the relationship.

Hurdle # 2: Service Technician Self-Image – “If I had wanted to be a salesperson, I would have become one.”

When we work with service technicians, the largest concern they have is to be turned into a salesperson. The term “salesperson” can conjure up some unsavoury images of white-shoed, white-

belted and pushy individuals prepared to do or say almost anything to get the sale.

Technicians with this view of selling are often insulted by the fact that management would want them to become like that. They didn't enter into their profession to be a salesperson, they wanted to fix things, use their knowledge and expertise to provide a service to others.

Hurdle # 3: Systems and Processes – “No one responds to the opportunities I find.”

Another hurdle in the strategy is that the effort by the service technician is often not supported by the firm's processes and systems. Even if you can convince the technician to sell the benefits of your company's services or products to the customer, the lack of systems to efficiently and consistently handle any resulting inquiry by the customer will often short circuit any attempts at business building that the service person might try.

We worked with one service firm that had a problem in this area. They had no real process of handling the opportunities that were identified in the field and as a result, new opportunities were never handled the same way twice. The results were inconsistent follow-up and, in at least one case, disastrous. A technician we interviewed shared one example with us. He had found a problem with a key piece of equipment and recommended to the customer that it be replaced as soon as possible. The customer asked the technician to have someone call him with pricing and installation information for the replacement. The technician reported the opportunity on the work order along with a request for a follow-up call by the salesperson responsible for that account. Unknown to the service person, no one followed-up. About a month later, the customer called in a panic because the equipment failed, just as foretold. Rather than praising the service technician for his ability to predict the failure, the customer was furious that there was no follow-up on the part of the firm. The service person took the brunt of the customer's anger and felt let down

by his colleagues. Needless to say, by the time we spoke with this technician, he was reluctant to identify any new opportunities in the future.

Hurdle # 4: Communication Skills – “I’m just not comfortable doing this.”

For many technicians, having proactive discussions with the customer is uncomfortable. They may not be certain how to initiate a discussion about services unrelated to the work they are doing. They may fear the prospect of the customer saying “no”. They simply may not know how to do it.

Whenever we are confronted with a task we are uncomfortable doing because we lack skills and practice, we will try to avoid it. Our technicians are no different.

Hurdle # 5: Management Coaching and Support – “This is too hard. I’d rather go back to the old way.”

As human beings we are naturally resistant to change. Change represents uncertainty and causes discomfort. When we try new things – like engaging a customer in a conversation about how we can help them achieve their business objectives – we can feel awkward and ill at ease. To make matters worse, when we try something for the first time, we often do not do it very well and this just adds to the discomfort. The path of least resistance is to revert back to our old ways.

Today’s service managers are busy. Strapped for time, they optimistically assume that new skills will be readily adopted and applied and wrongly feel that training by itself is enough to change behaviour in the intended direction. They have little time to follow-up and provide support to encourage skills adoption. Without ongoing coaching and support, the technicians will likely avoid using the new behaviour, even if they know that they can be more personally successful if they persevere. We therefore shouldn’t be surprised if new skills are left untried and behaviour reverts

quickly back to previous ways and the new skills go wasted.

Handling the Hurdles

We believe that a business development strategy built around the field service technician can be rewarding for both the service company and its customers. The key to success is to ensure that the four hurdles are addressed – that is, we must consider the needs of the customer, the concerns of the field service technician, the logistics of how opportunities will be handled and the responsibilities of management to ensure new skills are adopted.

Handling Hurdles 1 & 2: Overcoming the Salesperson Paradox and the Technician’s Self Image

When field service technicians focus on selling, they sometimes fall into the trap of trying to fit what they have to the needs of the customer. The process can become a battle of wills when the technician uses persuasion and argument to overcome customer objections in an attempt to get them to succumb and agree to purchase the product or service they are recommending. The focus changes to the sale itself and away from the customer. When the customer senses that they are being sold, they become confused for the reasons addressed earlier. In the mind of the customer, the technician has just changed from being a “trusted advisor” to just another “salesperson” and the relationship advantage is lost.

The solution is to provide the field service technician with training that ensures that any new business opportunities that are identified are based on solving the needs of the customer – not on the need to sell the services of the company. This subtle change in approach directs the field service technicians to change their focus from their firm and their services – i.e. what they have or do that can be sold – to their customer – i.e. what their customer needs and how they can best address it.

Interestingly enough, when we train our technicians to focus on the needs of the customer and identifying how their firm can best solve those needs, we are also addressing the field service technicians' concern about becoming a "salesperson". Although they will be using selling based skills to engage the customer, to explore for customer needs, to present recommendations and to provide compelling information in support of them, this approach is not a typical "sales" call. Rather it is simply a conversation with the customer – an exchange of information in a manner that is familiar to the service technician - using their knowledge and expertise to provide a service to others. In fact, most technicians will understand that they have an obligation to apply their knowledge, skills and experience to help their customers realize how they can make improvements.

Handling Hurdle 3: Filling in the Gaps – Ensuring You Have a Fool Proof System to Handle New Opportunities

We can eliminate a major demotivating factor from the equation by examining our own processes and systems for holes that may cause opportunities to be mishandled. We must ensure that our systems allow us to handle all inquiries quickly and effectively and at all times provide feedback to the technician.

We must provide clear answers and develop expectations based on the following questions: What message do we want our technicians to present to our customers? What type of opportunities do we want them to focus their time on? How far do we want the technician to take the business development process and how much does this depend on the type of opportunity being discussed? How should new opportunities be reported? How will opportunities be handled internally to ensure they do not get overlooked? How do we expect the technician to interface with our sales people? How is the technician expected to be involved in opportunity follow-ups? How

will we follow-up with the technician? How will we keep the technician "in the loop"?

By answering these questions and providing clear directions and expectations, we provide our technicians and other staff with a system to ensure that all inquiries are handled quickly and efficiently every time. Technicians will have more confidence in the system and in themselves to solve customer problems and help their customers to achieve their business goals. The customer will experience the real value in doing business with you and realize that they made the right decision in choosing you as their service provider.

Handling Hurdle 4. Provide Communication Skills Training and Allow Opportunities to Practice

Just like any technical skill, good communication skills can be learned. They play a critical role in the technician's success in exploring for and discussion new business opportunities with your customers. In addition, our technicians represent our companies and poor communication skills not only will result in lost opportunities, but could even result in the loss of the business we currently enjoy. Therefore, we should treat interpersonal skills as importantly as any technical training.

Handling Hurdle 5. Coaching and Supporting New Behaviours

Although to some technicians, engaging the customer and acting as a business advisor seems to come naturally, to many the new skills necessary to do this will seem foreign and uncomfortable. As managers, we need to provide ongoing support to encourage the technician to take the risks accompanied with trying new skills. Skills adoption and application is greatly improved when training is followed by coaching – some studies suggesting as much as four times more effective.

Coaching and supporting new behaviours also serves another purpose. It tells everyone involved that this is an important strategic initiative for the firm – not simply the latest management fad.

Conclusion

An engaged and focused field service team dedicated to solving customer needs can be an integral part of your business development strategy and will clearly add value to your customer relationships while differentiating your firm from your competitors. Your technicians will become even greater business partners to your customers – respected, trusted advisors who use their expertise to help each customer solve business problems and capitalize on opportunities. Your customers will be impressed with the approach and be constantly reminded that they have made the right decision when they decided to do business with you.

To make this strategy work for you, ensure that you invest your time and money carefully and support that investment through your management and business systems. Help your technicians to clearly understand your business strategy and the value you bring to your customers. Invest in skills training that go beyond simply selling skills to help your technicians to have meaningful conversations with your

customers and to capitalize on your technicians' inherent nature to want to help the customer. Support them with systems to ensure that their efforts are followed up on. Engage your management with supporting new skills adoption. Your customers will thank you.



Jim Baston is the authority on **Proactive Service**[®]. He has worked with thousands of technicians and their management teams to help them transform the service experience and reap the rewards of windfall profits that were locked in business relationships. He is author of **Beyond GREAT SERVICE – The Technician's Role in Proactive Business Growth**

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