





How *Proactive* is Your Service Team?

Score yourself against the following questions to identify opportunities to engage your field service techs more fully in business development. Circle the score that best describes your situation for each question.

In your company, do you ...	Rarely or Never	Occasion-ally	Frequently	Almost Always
1. Position business development as an important service activity to be performed by your service technicians?	1	2	3	4
2. Ensure your technicians clearly understand that their recommendations are an integral part of their service?	1	2	3	4
3. Provide regular education sessions for technicians on your firm's key products and services?	1	2	3	4
4. Furnish technicians with the "ideal customer" description for each key service?	1	2	3	4
5. Discuss specific conditions of "what to look for" to indicate where the particular service may be of value?	1	2	3	4
6. Ensure that you have support systems in place (e.g. tools to facilitate technician quoting) to support your techs' efforts.	1	2	3	4
7. Have a fail-safe process to handle leads from the field to ensure they do not fall through the cracks?	1	2	3	4
8. Provide feedback to the technicians for opportunities that they have handed off to others to fulfill?	1	2	3	4
9. Encourage techs to follow-up with customers on work they have quoted in the past?	1	2	3	4
10. Take concrete steps to integrate the efforts of the technicians and the sales team?	1	2	3	4
11. Train your techs in customer service / interpersonal skills to help them gain personal and professional credibility?	1	2	3	4
12. Coach your techs on how to have proactive conversations with customers about their recommendations?	1	2	3	4
13. Work with your technicians to identify possible resistance to recommendations and how to address it effectively?	1	2	3	4
14. Set time aside in regular service meetings to practice customer service and proactive conversation skills?	1	2	3	4
15. Ensure all stakeholders in your organization recognize how your initiative contributes to their success?	1	2	3	4
16. Advise your customers of your strategy to engage your technicians and seek their permission to proceed?	1	2	3	4
17. Meet with your key customers regularly to review recommendations and help them to plan for the future?	1	2	3	4
18. Measure customer satisfaction, retention and other key performance indicators?	1	2	3	4
19. Include customer survey questions inquiring about the value of the recommendations made by the field team?	1	2	3	4
20. Use your proactive approach as a differentiator to sell more service contracts?	1	2	3	4
Add the score for each question to get your Total Score				

Scoring Key:	Total Score	Comments
	61 – 80 Points	A strong business development culture and a proactive team.
	41 – 60 Points	A good foundation for a strong business development culture. Continue to focus on skills and support to help your technicians succeed.
	21 – 40 Points	Some untapped opportunities to enhance business development activities by technicians.
	< 20 Points	Several opportunities to enhance business development activities by technicians.