

## **Instilling a *Proactive Service*<sup>®</sup> Culture within the Service Team**

*“Technicians who seem naturally gifted at selling their company’s products or services do not see their efforts as selling at all – they see their recommendations as the valuable service that they are.”*

One of the greatest business development resources in any service company are their field service technicians. Time and again we hear service managers lament that their service technicians could be more involved in promoting new services and up-selling existing ones. Some firms have trained their technicians on selling skills. Despite the interest and the effort, most service managers we know would agree that the techs could do a lot more to boost their business development efforts.

Almost every service company can point to one or more of their technicians who seem naturally “gifted” to sell services. They are always making recommendations to customers and promoting new services – and their customers love them. In our experience, these techs are successful because they don’t see their recommendations as selling, but rather as an enhancement of their service. These “gifted” technicians understand the customer’s processes and, if they are really tuned in, they are aware of their customers’ goals. Most know their company’s products and services – even those products and services that they would not consider themselves to be technical experts in – and how they can be applied to help their customer improve their operations. Most importantly, they recognize that anything that they can do to help their customers improve the operation of their facilities or processes, eliminate unnecessary costs, increase energy efficiency and contribute to overall profitability, is a tremendous service for their customer.

The real challenge for managers is to convince the rest of the service team that they should be acting like those “gifted” techs. This takes more than a simple training program on how to handle customer objections. It requires the company to instill a business development culture throughout the service organization.

Based on our consulting work with some of this continent’s top service organizations and thousands of technicians, we have determined that there are seven key areas that management must focus on in order to instill a strong, customer focused, business development culture that includes proactively identifying and speaking with the customer about how the company can help the customer to run their operations better. This is not necessarily easy to do, but worth the effort. Successful companies should find that they are able to increase sales **and** increase customer satisfaction and retention. What customer would not value a partner that proactively works with them to show them how they can be more competitive in their own market place?

### **Focus on the service and not the sale**

Technicians who seem naturally gifted at selling their company’s products or services do not see their efforts as selling at all – they see their recommendations as the valuable service that they are. At every opportunity, repeat the mantra to your technicians that when they use their expertise and product/service knowledge to make

recommendations to help the customer operate their facilities or processes more effectively, they are providing a valued service. And, by focusing on how to better serve the customer, the sales will come.

### **Encourage your techs to get to know the customer's business and personal goals**

In order for the service technician to truly determine if a given product or service will help the customer, they will also need to understand what the personal and business goals of the customer are. These goals will help the technician determine whether a particular product or service is right for them, regardless of the generic benefits. Further, by showing the customer how the recommendation will help them achieve their goals, the technician will help motivate the customer to take action.

### **Regularly update techs on your products and services**

Technicians that are unfamiliar with products or services will be reluctant to get into a conversation with the customer about them. It is here that many service firms are missing large opportunities. Many of the technicians we meet complain that they do not know everything that their own company does. This is particularly true in large companies, but we have seen it in smaller ones as well. You might argue that it is up to the technicians to keep themselves technically up to speed with everything their companies do, but the fact remains that few technicians actually do. You can help your technicians maintain focus on your complete range of products and services by including a "product/service highlight of the month" at each service meeting. Identify a particular product or service, describe its features, benefits and value to the customer and, most importantly, discuss which customers would most likely benefit most. You might even include a discussion on what to look for to identify possible

customers in need. Complete the exercise by asking your technicians to think about their customers who might benefit and commit to speaking to each one about the service at their next visit.

### **Develop a clear opportunity response process with feedback to the technician**

Nothing will stop a technician from making recommendations to a customer more than the lack of follow-up by the rest of the company's staff. A technician that makes a recommendation that requires follow-up by others (such as sales person or a manager, for example) and which is not followed up is unlikely to continue the practice. Make sure you have a clear process for identifying and following up on recommendations from the field. For example, is there a clear expectation of how you expect your technicians to raise the opportunity internally? Should they simply describe the recommendation on their work orders? Should they call in each opportunity? Should they send a separate email? If the work order option is used, is there someone responsible to review each one to ensure no opportunities fall through the cracks? Regardless of what you chose to do, make sure the opportunity follow-up process is clear, concise and consistent.

### **Create a follow-up process for quoted work**

Most technicians will tell you that they have several outstanding quotes and recommendations to customers for which they have not heard back on what the customer would like to do. When pressed as to why they think that the customer has not gone forward, most would list "they likely forgot" as one of their top five reasons. This makes sense. Your customers are busy people and they have business interests well beyond the equipment that your technician is servicing. The importance of the recommendation is often lost in the urgent day-to-day activities.

To address this, encourage your technicians to actively follow-up on quoted work. If you technician is in doubt of whether the customer would appreciate a follow-up or not, suggest to them that they simply ask the customer: *“Would you have any objection if we sat down once a quarter over a cup of coffee and go through all of the proposals we have made to you during that time? By doing so I can ensure that you do not lose sight of important recommendations and you can tell me how you would like to proceed?”*

### Provide communication skills training

The true value in the work that technicians do cannot be seen. That is because service is largely a knowledge business and the value the technician provides is in their heads. Since customers are unable to see the real value that is provided, they look for clues to that value from what they can see. They look at how the technician communicates with them – what they write and what they say. They look at how the technician is dressed and groomed, how the technician leaves the work area, the condition of the technician’s vehicle and other tangibles. These images all combine in the customer’s mind to give them a sense of the value the technician brings to their facilities. It is important therefore that your technicians be aware of the impact that they have on others and how that affects the value perceived in their work, and frankly in the relationship the customer has with the tech. Train your techs to communicate value in every customer interaction.

### Provide ongoing coaching and support

Coaching and supporting new behaviors plays a critical role in new skills adoption. For some, taking a more proactive approach to discussing opportunities that will help the customer run their facilities more effectively is a challenging task. It takes time and practice to become comfortable.

Without coaching and reinforcement, our technicians will simply revert back to their old ways and our efforts will be lost. Think of coaching as a form of maintenance. You would never expect a piece of equipment to run very long or very well without maintenance so why would you expect your service team to perform well and consistently at new skills without coaching?

### Conclusion

The competitive playing field is changing. Our customers are becoming more demanding, margins are being squeezed and attracting and retaining an excellent labor pool is becoming increasingly difficult. This new environment requires a service firm to provide higher levels of service than ever before and a key component of this enhanced service is taking a more proactive role in helping the customer run their facilities and processes more effectively. Forward looking service firms must instill a business development culture amongst their staff and particularly within their service technicians. This may not be an easy process but the results can be worth the effort – increased revenues and profitability, higher customer satisfaction rates and retention and a more exciting place for your employees to work.



Jim Baston is the authority on **Proactive Service**<sup>®</sup>. 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**