

10 Steps to Level Up Your Field Service Business



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CONTENTS



Introduction

01

Transition to
automated
communication

02

Create
bespoke digital
certificates

03

Digital invoicing
and on-site
billing

04

Collect digital
documents
and signatures

05

Integrated
vehicle tracking

06

Real-time
scheduling
optimisation

07

Parts
management
and stock control

08

Use a supplier
database

09

Automated
invoice
management

10

On and offline
management

Introduction



You're finally a paperless business (as much as is possible, at least). That's great news! You're saving time, money, and helping the environment; not to mention you've made your customers and staff happier, too. After all, since making changes, you've seen a reduction in all sorts of performance issues that had been plaguing your business. With better stock control, no more missing data, and annoying stacks of paper removed, (to name a few benefits) you can breathe a sigh of relief...

But what's next? How can you push your business to be even more successful?

With this checklist, we can show you how.

With some helpful tips for you to consider and links to additional advice you can investigate - with particular emphasis on automation and integration - you can take your paperless business to the next level.

How to use the checklist

You may already have some of these points in place, but it never hurts to double check. This checklist will help ensure you have the tools and systems in place to create a fully automated workflow. Just check off the items you already have in place.

For the ones you're missing, use the spaces provided to note whether you want to incorporate the tool into your workflow, set a deadline, what steps you may need to take internally, and dictate who in your business will take the lead on it. We've also provided some handy links where Commusoft can offer a solution, as well.



Step 1:

Transition to automated communication

You're already connecting with your customers digitally, for example using Gmail or through your website. Now, however, you can automate your communications to create even more impact: If you're not already, consider service reminders, feedback and review requests, and marketing messages: these can all be set up ahead of time through your FSM system!



With communication automated, you can rest assured your customers are being taken care of at all times, even while you sleep.



We've automated our marketing and after-care communications.

Yes No

Do we want to implement this tool?

Yes No

Next steps: _____

Deadline for implementation: _____

Assign to: _____

How Commusoft Can Help:

Learn more about our Service Reminder feature!

[Learn more](#)



Step 2:

Create bespoke digital certificates

Your software may already let you fill out and send certificates automatically, but sending bland, uninspired certificates doesn't deliver a great customer experience.

You'll want to consider moving up to a digital certificate feature that lets you customise (with ease) the experience for you and the customer.



For instance, you'll want your certificate feature to autofill customer details, let you create dropdown menus of common information for your engineers, and add your company colours and logo to certificates, as well.

Simple changes like this have the added benefit of helping you to look even more professional, make your engineers' jobs easier, and enhance the customer experience.



We digitally create and send custom certificates.

Yes No

Do we want to implement this tool?

Yes No

Next steps:

Deadline for implementation:

Assign to:

How Commusoft Can Help:

Learn more about our Custom Certificates feature!

[Learn more](#)



Step 3:

Digital invoicing and on-site billing

Sending invoices via email, or having an online payment portal, is the first step toward reducing debt, increasing cash flow, and giving your customer the best experience. Now, you can streamline it even further by giving your engineers the ability to bill or invoice the customer, right on site. No one wants to be kept waiting, especially when it comes to finances.



Being able to settle a bill in the moment, straight after a job is something customers will not only appreciate, but in this age of convenience, they'll also likely be expecting too. Combine that with automated certificates, as above, and you're on to a winner; helping you to provide a better customer experience, reduce debt chasing, and more.



Our engineers bill/invoice the customer on site.

Yes No

Do we want to implement this tool?

Yes No

Next steps:

Deadline for implementation:

Assign to:

How Commusoft Can Help:

Learn more about our Invoicing and Payment Tracking feature!

[Learn more](#)



Step 4:

Collect digital documents and signatures

To take advantage of many of your paperless tools - like certificates, estimates, and billing - you need to be able to capture digital signatures on site. Not every software will have this, but to get the most out of your other solutions, it is a necessity.



Digital signatures will help you head off or solve any conflicts that may arise, and a digital solution lets you record and save a signature when an engineer arrives and leaves a job. Easy.



We collect digital signatures.

Yes No

Do we want to implement this tool?

Yes No

Next steps:

Deadline for implementation:

Assign to:

How Commusoft Can Help:

Learn more about our Collecting Customer Sign Off, with our Certificates feature.

[Learn more](#)



Step 5:

Integrated vehicle tracking

A standalone GPS tracker lets you see where your engineers are, which can help reduce time theft, and even assist in vehicle recovery if it's stolen. However, as brilliant as the feature can be, if it's not integrated with your workflow management system, you won't be able to take advantage of the data it generates.



This means missing out on data regarding optimised route, financial savings on fuel and maintenance costs, an increase in safety, or the ability to let your customers track the engineer's journey. Peace of mind is valuable not just to you, but your customers as well.



Our GPS tracking system is integrated with our workflow management software.

Yes No

Do we want to implement this tool?

Yes No

Next steps: _____

Deadline for implementation: _____

Assign to: _____

How Commusoft Can Help:

Learn more about our Real-Time Vehicle Tracking feature!

[Learn more](#)



Step 6:

Real-time scheduling optimisation

You're already booking jobs using the diary management feature in your FSM software. The next phase is to implement an intelligent scheduling feature, which analyses and provides suggestions to help you optimise your schedules with the aim of increasing efficiency in real-time. This feature can make it infinitely easier to arrange your appointments and optimise your engineers' diaries.



We use intelligent/automated scheduling.

Yes No

Do we want to implement this tool?

Yes No

Next steps: _____

Deadline for implementation: _____

Assign to: _____

How Commusoft Can Help:

Learn more about our Intelligent Scheduling feature!

[Learn more](#)



Step 7:

Parts management and stock control

Knowing what parts your engineers are ordering, and where parts are located in your stockroom is crucial for getting jobs done on time and keeping costs down. You already manage parts digitally, so now it's time to up your game with a stock control system that helps it happen automatically. Then you won't have to rely on your engineers to let the office staff know which parts they're using, or to sign parts into and out of the stockroom.



We use a digital stock control system.

Yes No

Do we want to implement this tool?

Yes No

Next steps:

Deadline for implementation:

Assign to:

How Commusoft Can Help:

Learn more about our Stock Control feature!

[Learn more](#)



Step 8:

Use a supplier database

Thanks to your customer database, you're no longer relying on paper files to figure out who's calling and what they're calling about. Take your business to an even higher level by implementing the supplier database through your FSM system, which shows your purchase orders and money owed, and lets you quickly request and compare parts prices.



Streamlined supplier management = faster jobs = happier customers!



We're using a supplier database to streamline parts ordering and job costing.

Yes No

Do we want to implement this tool?

Yes No

Next steps: _____

Deadline for implementation: _____

Assign to: _____

How Commusoft Can Help:

Learn more about our advice on Supplier Management!

[Learn more](#)



Step 9:

Automated invoice management

Receiving digital invoices from suppliers is a good step towards fully implementing automated solutions to your business. Being able to store, access, and apply that data easily will be a great help. Next up, then, is to set up your FSM system so it can collate invoices and record them automatically, so data is applied wherever you need it in your business.



Our workflow management or accounting system collates and records supplier invoices.

Yes No

Do we want to implement this tool?

Yes No

Next steps: _____

Deadline for implementation: _____

Assign to: _____

How Commusoft Can Help:

Learn more about our Automated Supplier Invoice feature!



[Learn more](#)



Step 10:

On and offline management

Digital tools aren't helpful if your engineer can only use them when they're connected to the internet. An offline app (that resyncs data when it reconnects) will help to keep your computer and mobile devices in sync, so you can run your business from the office and on the road without worrying about a constant internet connection.



Our engineers can use their digital tools in the field even with no internet connection.

Yes No

Do we want to implement this tool?

Yes No

Next steps:

Deadline for implementation:

Assign to:

How Commusoft Can Help:

Learn more about our Mobile App for managing your workforce in the field!

[Learn more](#)



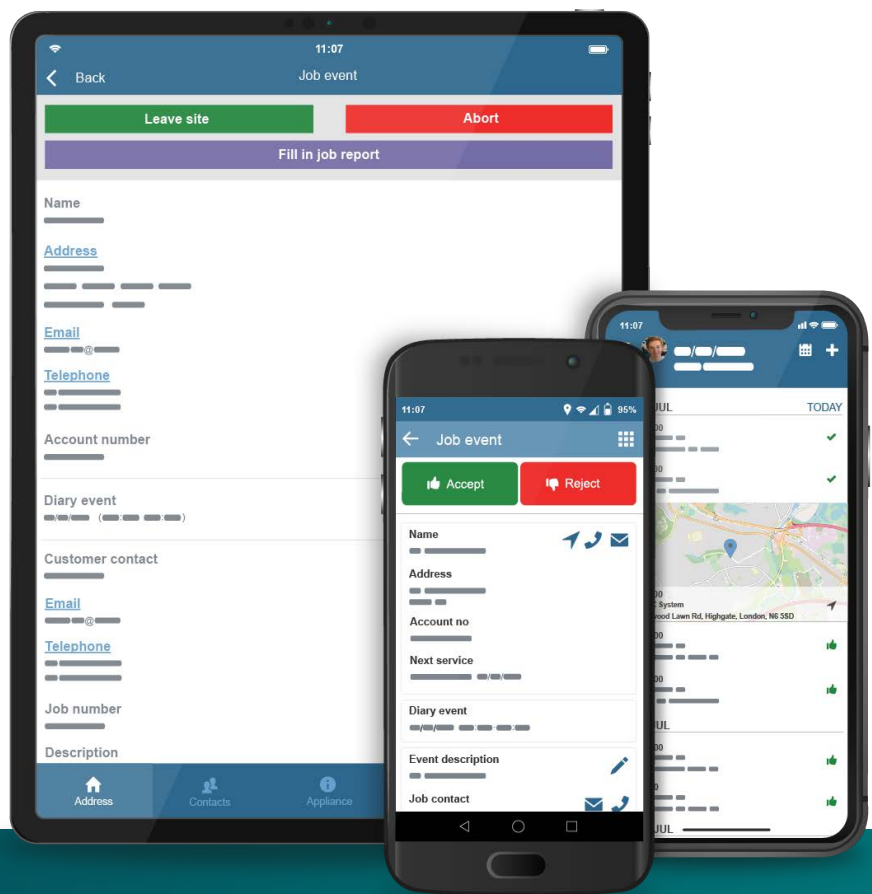


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*for field service
businesses*

Keen to see more?

Whether you're already paperless, or on the road to paperless success - and want to take the next steps to full automation - Commusoft is here to help.



Take a tour and watch a demo to find out how.

Watch a demo