Service Call Analysis

Performing field analysis is one of the most effective ways for Service Managers to develop Service Technician performance.

Helping team members to:

* Prepare for calls.
* Observing during calls.
* Providing feedback after calls.

Creates a host of benefits for everyone involved in the process.

Here are some of the major benefits:

1. Reinforces service skills workshops.
2. Shows that you are serious about incorporating a retail system.
3. Serves as a working tool to hold individuals accountable.
4. Gives your Technician an opportunity to demonstrate his/her abilities.
5. Demonstrates your company’s commitment to team member’s professional development.
6. Provides an opportunity for immediate recognition and reinforcement of effective performance.
7. Pinpoints the areas that have the greatest opportunity for improvement.
8. Creates a firsthand viewing of how the Technician relates to your customer.
9. Serves as a vehicle for management to observe market conditions on a regular basis.
10. Helps to add stability in a rapidly changing environment.

The amount of time spent coaching depends on the developmental needs of each individual and the other responsibilities that the Service Manager has within your organization.

**Most contractors admit that their managers don’t spend enough time in the field.**

**“Make it happen!”** It is strongly recommended that field analysis should be performed at least once a quarter per team member. The benefits are vast, and after a period they become lasting. The hard work pays off because the behaviors you teach while in the field as a manager become part of the everyday life of your field **team.**

Isn’t that what you want?

It is important that you put equal effort into what happens before, during and after each service call. These three phases of the process for performing field analysis are defined as follows.

1. **Preparation**

Plan with the Technician, before the call, to clarify the objectives, roles and strategies. Put the technician at ease.

1. **Observation**

Paying close attention insure that the integrity of the service system is intact and how the technician interacts with the homeowner(s). **You may want to refer to materials on the site in “The Perfect Service Call”!**

1. **Feedback**

Using a Service Call Analysis form to document strengths and areas that need improvement in a way that develops the technician’s confidence in the system. The form demonstrates professionalism on the manager’s part and keeps a running record of areas of improvement. It also helps during review time.

By themselves, each of these steps is valuable in supporting every team member’s performance. However, when combined in this three-step process, they form a powerful tool for developing high-performing technicians… EVERY DAY!

Preparing For A Service Call

It is important to schedule some time for a pre-call meeting with the technician you are riding with that day. This will insure that you meet team member and customer needs.

In most residential service call situations, you’ll probably want the Service Technician to handle all phases of the call while you observe.

On rare occasions you may wish to demonstrate a specific technique for the technician in front of the homeowner(s). Be aware of how this can make the technician feel before you do this!

Here is a list of topics that should be covered in the pre-call meeting:

1. Review the confirmation of the appointment. What prompted the call? How did they find out about us? What is the history of the customer and equipment?
2. Go over a Service Call Analysis form to refresh the technician on the evaluation procedure. What you intend to be paying attention to in detail.
3. Check to make sure that “Service Tool Box” and sales tools are in order. **(See the Web Site if you need refreshed on Service Tool Box or Technician Sales Processes).**
4. Rehearse or review critical elements of the call, including opening, common objections, closing techniques and the roles that each of you will be taking.
5. Position your role in the service call. Examples: Service Manager (observer for Technicians developmental purposes), a quality control function, a student learning from one of the best, or an inside manager experiencing the outside world.
6. After your role has been established the technician should plan how he or she will introduce you the homeowner(s).
7. If you are going to demonstrate a technique it is important to practice the timing and transition with the technician.

Cover the topics above on a consistent basis to eliminate confusion and present a positive image.

End you pre-call meeting on a positive note by indicating your confidence in the technician’s ability to conduct the call effectively.

Observing Service Performance

Observing a team member’s performance during a service call and using your observations as a basis for providing feedback, can have a significant effect on the long-term success of your sales efforts.

*To observe a service call effectively you should put*

*yourself in a non-obtrusive state of mind.*

You will probably be tempted to jump in and participate in the presentation from time to time, but that is not your role. The evaluation will be maximized if you observe standing in the homeowner(s) shoes. This will allow you to focus on how your representative is covering the primary steps in the service call process and how well he is building a like-trust relationship.

Here are some of the questions you should be asking yourself during the observation:

* Did the Service Technician do a good job of asking the right questions to explore all of the comfort needs?
* Is the Technician truly sensitive the customer(s) needs?
* Is he or she doing a good job of toning down the features and expounding on the benefits?
* Is the presentation easy to understand?
* Does the team member’s speech and body language project a positive manner?
* Is the presentation being delivered with sincere enthusiasm?
* Is the service call moving at a pace that stimulates maximum interest from the client?
* Is comfort being presented in a non-pushy manner?

If the answer to all of the questions above is yes, you are probably observing a high performing top-flight technician.

You can use this list of questions to stimulate your responses on the bottom of a Service Call Analysis™ form.

Providing Service Call Feedback

To complete the field analysis process you need to conduct a post-call discussion with the team member, providing feedback about his or her performance during the call.

The feedback discussion should take place **immediately** after the call, in a quiet and private environment.

Be careful not to overload the Service Technician with too much corrective feedback.

In cases where there is a lot of improvement needed, you should select the most important areas on the basis of how severely they affect the customer and the call outcome. Try to balance needed improvement with the positive ingredients that you’ve observed.

*Our tendency is to give it all, and give it fast. Be aware you are developing a future star, work on a few items that are critical and build a great foundation and teach them at a pace they can handle – And not everyone’s pace is the same!*

A good way to start the post-call discussion is to review the benefits of field analysis. (The ten benefits at the beginning of this article.) This will give the Service Tech a clear view of why your company insists that field analysis is a very important ingredient to your retail system.

Use a Service Call Analysis form as a tool to review your observations. The form should not be foreign to the technician.

You should hand them out at the completion of training sessions to reinforce workshops. They should use them to perform self-analysis.

Here are some suggestions on how to use the form:

1. While you are filling in the name and date on the top of the form, ask the technician if he or she would help you with the completion of the analysis. The teamwork approach usually insures a higher percentage of buy-in to the process.
2. Read the questions on the form out loud and ask the team member how he or she feels they performed on that particular segment of the call. In most cases you will find that they will be very honest with their responses.
3. Most of the time you will probably concur with their response-circle the agreed upon answer. Sometimes they will be too critical of their performance-circle the more positive answer. On rare occasions they will not be critical enough of their performance-circle the less positive answer. When you upgrade or downgrade an answer give a brief explanation of why you feel differently.
4. If you feel that a question on the form in not applicable to the service call you just observed-do not circle any answer.
5. Make sure that you answer the questions on the blank lines on the bottom of the form. You can refer back to the questions you should be asking yourself during the observation.
6. Conclude the form by writing down any final comments, sign your name and ask the technician for his or her signature.
7. You should give a copy to the technician and place a copy in your personnel file.
8. The next time you perform field analysis with this individual, you should pull out your copy and use it in the post-call meeting to measure improvement.

Always end the field analysis on a positive note. Indicate your confidence in the Technician’s ability to improve performance, or continue to do well. Such confidence indicates your interest in the individual and builds a feeling of mutual trust.

Use this Service Call Analysis form as a model to design your own. Every company is different with different needs. **Learn from what Consolidation taught us in terms of the things NOT to do – Paint it all with a single brush.** The concept is valid – Have a process but develop your specific materials to execute at a peak level – That requires you to customize this approach!

Remember that this form was designed to reinforce the training that has already been conducted.

Conclusion

Of all the things your company can do to improve the performance of your service force, field analysis is, without question, one the most powerful tools.

It is the only way for you to observe, first hand, how your company is performing in the field.

There are no shortcuts to training your field force to be excellent.

This kind of dedicated management support and training is exactly what creates improved execution.

It is the key to determining the effectiveness of your training programs. “**Don’t expect until you inspec**t.” It will give you the positive and negative feedback you need to change course in a winning direction.