



POWER TO YOUR PEOPLE!

10 Ways HVAC Contractors
Can Win, Keep and Grow
Their Business

THIS GUIDE IS
BROUGHT TO YOU BY



FIELDBOSS
CONTROL THE FIELD

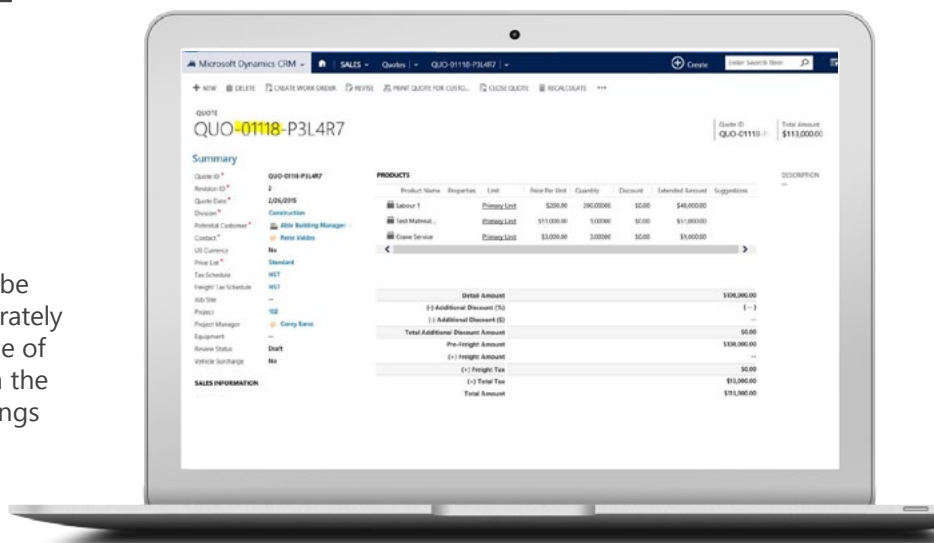


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AUTOMATE QUOTES & ESTIMATES

Completing all the research, calculations, and paperwork for quotes, jobs, and estimates can be overwhelming. Getting it done quickly and accurately to ensure profitability can be an ongoing source of stress. If you are rushed and not equipped with the right information, mistakes will happen and things will likely fall through the cracks.



With an automated estimating and quoting process you can help your sales team create more accurate quotes in less time while winning more business. Increase your company's winning proposal numbers by:

1. Automating business processes

Use software that enables one click conversion of lead records into opportunities. Automation can also be used to generate one click into proposals and quotes. Once the job is won, you can instantly convert accepted proposals, quotes, and estimates to work orders and invoices.

2. Improving user productivity

Instantly look up and insert key information such as equipment, material, labor, and other charges with customizable drop down lists.

3. Utilizing Microsoft Word templates

Streamline document production using Microsoft Word templates to quickly prepare professional

customer response emails, proposals, quotes, and estimates. Documents can be customized in your own language with detailed disclaimer text. Take things one step further by attaching pictures, documents, and spreadsheets to any proposal, quote, or estimate.

4. Leveraging email alerts and dashboards

Manage the information that really matters like markups or margins on estimates. Management can see in real time the likely effect on profit using email notifications or viewing the quote information on-line via charts and graphs, and then decide to approve or rework the quotes.

By applying automated quoting into business processes, your company will be able to increase sales, improve service procedures, and generate more revenue. That's how you win more business!



OPTIMIZE SCHEDULING, DISPATCH & ROUTING

As the scheduler or dispatcher of an HVAC company, you're responsible for much more than just booking a technician for each open work order. With the growing focus on customer satisfaction, it's your responsibility to make sure each work order has the best technician for the job. In order to assign the right technician, you must consider factors like skill set, travel time, labor costs, customer preference, job duration, inventory availability, service level agreement, regulatory compliance, job priority, appointment windows, and more. With all the moving pieces that go into scheduling and dispatching, your job can start to look more like that of an air traffic controller, weighing every move to avoid disaster and achieve optimal results.

Schedulers and dispatchers need to be connected to your field technicians, your customers and their equipment in order to take more calls, dispatch more efficiently, and deliver the service at levels your customers expect and deserve. Here are some ways to do that:

1. Streamline scheduling tasks

With scheduling and dispatch software, schedulers have complete visibility of the calendar and scheduling board, so it takes seconds to figure out who's available, then schedule, dispatch, and alert a technician to a job. And since many service organizations take and schedule dozens of calls per day, even saving five seconds per call adds up to thousands of dollars per year.

2. Connect to the field

Implementing a mobile solution means that your field techs can update their job status in real-time right from the job site. Automatically receive updates via alerts, escalation notifications, and workflow automation connected to the mobile devices of your technicians. No need for phone calls with status updates. Alerts also go from the scheduler to the technician's mobile device when a work order changes or techs are scheduled to a new work order.

3. Schedule intelligently

Schedulers can save time and make smarter dispatching decisions if they have visibility into service history, technician status, and GPS location. Success rates in the field improve when technicians have access to the equipment service history and the tools and skills required to fix the problem before they even get on site.

4. Watch first-time fix rates

Schedulers can ensure that a qualified technician gets to each job site in the shortest amount of time possible by scheduling technicians based on availability, location, skill set, parts availability, and more. Improving first time fix rates can save your company hundreds of thousands of dollars due to reduction of second-trips and quicker service times. It's also the number one element of customer satisfaction.

5. Integrate maintenance and service contracts

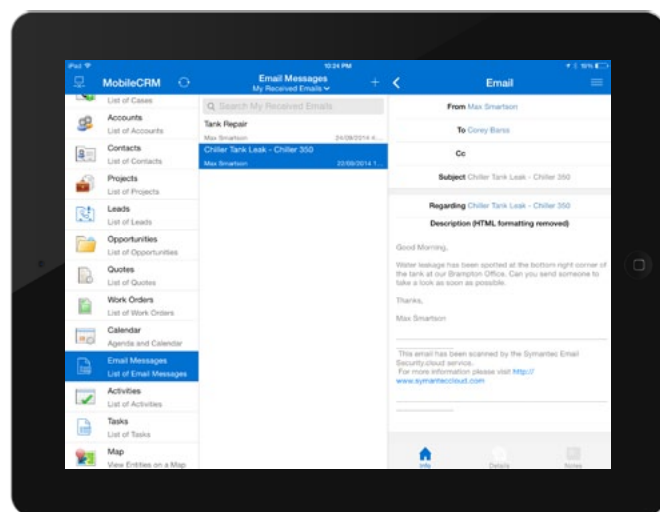
Schedulers can set recurring maintenance work orders. Maintenance contracts and annual inspections are automatically placed in a scheduling queue and are out of sight so you can focus on priorities but never forgotten so they won't fall through cracks. When it is time for maintenance, the appointment automatically appears on the schedule at the appropriate time with all the order details.

With a comprehensive, end-to-end field services management software, schedulers and dispatchers will immediately optimize scheduling, dispatch, and routing operations in a manner that allows them to better utilize equipment and manpower, while cutting costs and improving customer service.



AUTOMATE MAINTENANCE & SERVICE CONTRACTS

Does this sound familiar? A customer expects the cost of some item on the work order to be covered by their service contract, but the technician isn't able to confirm either way. Are parts included? Does the customer qualify for discounts on the labor rate? Without readily available contract information, technicians are put on the spot and often end up doing work for free or not billing for parts.



Without a system in place to facilitate communication between the field, back office, and your billing department, cash will flow out of a business just as quickly as it flows in. This lost income, or “leakage” will undermine efforts to grow your organization’s service revenues. With the right tools to automate, organize, and expose contract details, you will reduce leakage while increasing revenue and customer satisfaction. Here are some helpful tips:

1. Set up alerts for expiring maintenance contracts

Alerts can be set up to automatically email anyone in the company (or even customers) when contracts are about to expire. This way, you know well in advance when to start working on a contract renewal so that an existing contract never falls through the cracks.

2. Track inventory for service contracts

Hard to find or expensive parts might be required for certain preventative maintenance or regularly scheduled visits. These can be part of the setup of the maintenance contracts. You can also add automatic alerts to notify the right people when to order the right parts for each regularly scheduled visit so they are ready for each job at the time it is scheduled.

3. Set up automated email campaigns and workflows to sell contracts

Sales people and customers can be automatically notified when a customer is not under contract but could be. You can also set up email campaigns and workflow automation to automatically contact customers, encouraging them to sign up for service contracts.

4. Keep technicians informed

Techs can stay informed with up-to-date warranty, equipment, customer, and service contract information. This will make sure there is no more free service and un-paid parts.

5. Use contract profitability alerts

Get automatic email notifications or dashboard views when contracts aren't hitting the profit benchmark you set for your company.

Preventive maintenance and service contracts are the most profitable source of revenue for HVAC companies. Businesses that perform preventive maintenance out-earn companies that don't. Give your technicians and office employees the tools they need to sell, renew, and manage contracts. Don't miss out on revenue that is already in your pocket.



IMPROVE HEALTH & SAFETY TRACKING



Health and Safety inspections are a vital and legislated aspect of the HVAC industry. A lack of compliance can lead to a host of problems including serious fines. To keep your techs safe, your company compliant, and avoid OSHA fines, companies must implement comprehensive safety programs that include policies, employee responsibilities, safety procedures, and safety training. Health and safety compliance can be verified using mobile devices combined with field service management software. The software will help you:

1. Perform work area assessments

An HVAC worker can upload a time-stamped photo to indicate proper ventilation was installed for an indoor unit at a job site or show video of a work area being cleaned of debris and equipment following a completed job.

2. Automate substance tracking

Track and report refrigerant use and keep track of hazardous substances that your HVAC technicians frequently use to complete their work, including all the relevant information such as quantity, dates, and time of service.

3. Maintain a safety inventory

Maintain a complete list of personal safety equipment such as hard hats, goggles, ear plugs, protective clothing, and more, which you can simply click through (yes or no) on the mobile inspection form.

4. Monitor OSHA compliance

Follow OSHA's Confined Spaces rule. OSHA requires employers to document their standard operating procedure for permit required confined spaces and to make sure procedures are followed for general confined spaces so if something goes wrong, OSHA has an audit trail.

5. Automate data entry

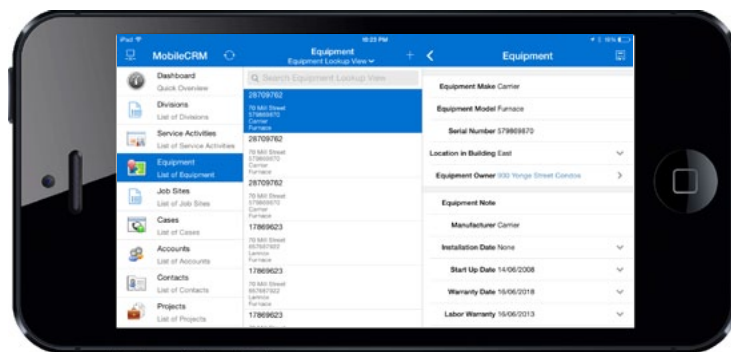
Techs can fill out an inspection form after completing a complex procedure, which can be stored and shared with other technicians working on similar jobs. To make knowledge sharing even clearer and more valuable, technicians can include pictures, video, and detailed descriptions so future techs don't need to start from scratch every time they struggle to finish a challenging job.

Don't slack on safety. Be sure your processes for managing the health and safety of your technicians are thorough because if they're not, you put your entire company and anyone interacting with your equipment at risk. You also expose your company to serious fines and employee down time.

With improved safety inspections, you and your staff can rest assured that your process is thorough and your job sites and equipment are safe. And since inspections will be easier and quicker to perform, technicians will be freed up to perform other tasks like billable labor or extra work orders. It's a win-win for everyone.



ORGANIZE & MANAGE INVENTORY



Frustrated. Disorganized. Overwhelmed. This is what it can feel like to run an inefficient inventory department at your HVAC Company. When you don't know where your parts are and your technicians aren't prepared with the right parts to complete the job, response times and first-time fix rates are lower. Customers are unhappy,

and you are left feeling behind and frustrated. With field service management software, you can manage alerts, escalations, and workflows to ensure parts are where they need to be: with the right technician at the right time so your operations run smoothly and services are performed promptly.

Here are some benefits of managing an organized inventory:

1. Prepared technicians

When technicians receive the right parts in their trucks for the right jobs, their performance and productivity improve, directly benefiting the company's overall success.

2. Improved response time

When inventory managers are aware of where your parts are and of what parts are needed for each job, they are better prepared to send a technician promptly to a job site. Likewise, schedulers who know which parts each tech has in their van can schedule the closest technician with the right parts. This visibility makes it easier for techs to be prepared to solve the problem and improves the response time for techs to get on site.

3. Reduced travel time

If technicians are prepared with the right parts the first time around, they don't have to return to inventory to retrieve the part they're missing, reducing overall technician travel time.

4. Greater workforce productivity

With more prepared technicians and less idle time, techs can focus on what they do best: service work. And by spending more time on billable labor, techs improve overall company productivity.

5. Increased customer satisfaction

When technicians are more productive and ready with the right parts, they'll probably fix the problem the first time and decrease the amount of time spent performing the task or searching for a part.

Customer frustration, increased cost, and extra drive times are all adverse outcomes of technicians not having the right parts. You can avoid these frustrations by investing in field service software that will keep your company and inventory personnel organized. By not losing parts, and knowing what's been used, what's on-hand, and what you need to order, you will certainly see an increase in resolution times and growth for your bottom line.



IMPROVE FIRST-TIME FIX RATES

One of the most aggravating incidents for any contractor is when you need to make a return trip to your customer. Whether it's because a part is missing, a technician does not have the right tool or skill set, or a scheduled task wasn't performed properly, a return trip always results in lower profit and unhappy customers.

WHAT IS THE REAL IMPACT OF LOW FIRST-TIME FIX RATES?

The extra expenses required to resolve jobs that aren't fixed the first time can take a substantial chunk out of your bottom line: extra truck rolls, extra labor, increased dispatch energy and attention, and lost service opportunities elsewhere. Independent research has shown that service calls not resolved on the first visit

require an additional 1.6 dispatches to fix the issue, at an average cost of \$200 to \$300 per truck roll. The toll of the cost adds up quickly for companies burdened by low first-time fix rates. As a result, field service leaders end up adding more technicians and more overhead just to keep pace with high-performing competitors.

Improve first-time fix rates by:

1. Giving technicians information

Technicians with complete information can make better on site decisions. Previous work done, access to the tasks that are scheduled to be performed, and upcoming maintenance as part of the service activity can have a dramatic impact on getting things done properly the first time.

2. Improving dispatch

Equip your dispatchers with all the information they need to assign jobs to technicians who have both the appropriate skill set and the parts on hand to correctly resolve the customer's issue the first time.

3. Enhancing inventory visibility

Access to real-time inventory information for your technicians and the ability to order parts from the field will ensure that the right parts are available when and where they're needed while reducing technicians' tendency to stockpile parts in their vans.

4. Collaborating

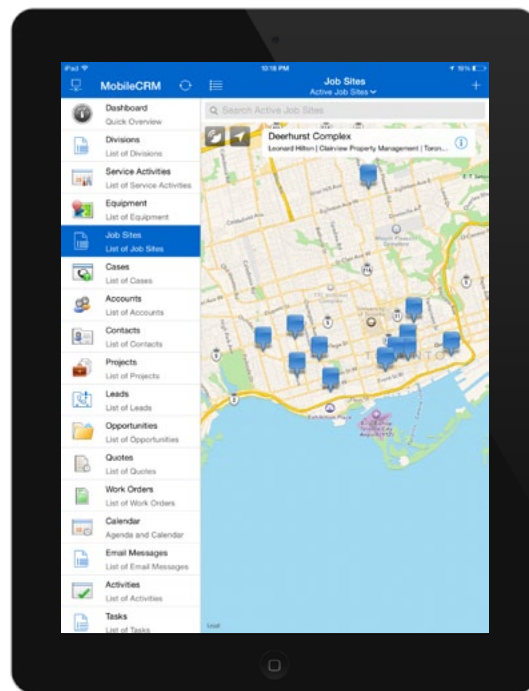
Give your techs remote access to the collective knowledge of your entire company through real-time collaborative and social tools. This way, technicians can get the answers to their questions quickly, right on their smartphone or tablet, to fix the problem during the first visit.

First-time fix rates reflect how efficiently and effectively your organization can service existing customers. The higher the first-time fix rate, the greater capacity your team will have to make more service calls in a day and service new customers at the lowest possible operational cost. High first time fix rates are a win-win for everyone.



INVEST IN POWERFUL MOBILE TECHNOLOGY

Many organizations have mobile technology in place for their field service. But having a device with some bells and whistles is not the same as having a connected tool that empowers your field service technicians with access to the information needed to resolve customer issues the first time. Failure to resolve issues not only leads to costly return visits, but it also negatively impacts customer satisfaction.



Top performing organizations invest in mobile tools to provide technicians with better access to information in the field. However, it is not enough to just put a mobile device in the hands of every tech. A mobile device that is connected to a comprehensive field service management solution will allow technicians to:

1. Deliver accurate estimates, quotes, and invoices on-site

Easily record all aspects of the service call from time spent on site, parts used, and follow-up work that needs to be done. No need to fill out time consuming paperwork. The invoice can be signed for and paid right on the spot. With sophisticated quoting tools and an integrated estimating process, technicians can quickly and accurately convey to the customer what needs to be done, how much the job will cost, and how long it will take.

2. Access real-time data in the field even when offline

With technicians located at countless types of job sites, it is vital to have a mobile app that allows them to manage inspections, work orders, and signatures even when there isn't a data connection. Whether online or off, technicians must have the most up to date information while in the field to be able to fix issues. The rapid change in work orders, part specs, and customer needs demands that data be refreshed frequently and made readily available so techs are experts in the field.

3. Enable knowledge sharing

Allow field techs to effectively communicate and collaborate with others, increasing the speed at which they gather the necessary information to complete a job. Faster completion enables the field tech to move on to the next job, improving their utilization for the day, increasing first time fix rates, and improving overall customer satisfaction. In addition, instant access to this helpful information boosts the confidence of field service technicians, providing the opportunity for greater technician success.

4. Keep track of parts and inventory

No more searching for missing parts or holding excess inventory. Parts are an integral aspect of field service, as a tech can't resolve an issue if the right part isn't available. Mobile tools can be used to provide techs with up to date information on part locations and notify a tech if a part is nearby in another technician's truck. Always know what is needed, how much to order and where to find it.

By providing your technicians with an integrated mobile device, you are investing in their ability to provide the best service possible to your customers. You will also be rewarded with increased efficiency and improved productivity.



INVOICE FASTER & ELIMINATE ERRORS

While sales and profit look great on paper, cash is what keeps your business afloat. Cash flow hiccups can put a strain on your operations and make your job much more stressful. That's why it's so important to stay on top of your company's invoicing and billing cycle. The clock for service-to-cash starts ticking the moment the job is done, not when the customer is invoiced. The longer the lag time between the service and invoice dates, the greater the cash flow crunch you'll have to deal with. And if technicians don't have access to the necessary information, they could be invoicing incorrectly and you could be losing money.

FIELD BOSS
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Date: 1/22/2018 Invoice #: INV-01194-VGGJ04

Remit To
Accounting - ART Dept
Fieldboss
1210 Eglinton Ave W
Etobicoke, ON M9C 2E3
Phone: 416-255-4005 Email: info@example.com

Bill To
AFFORDABLE PROPERTY MANAGEMENT
70 Mill Street
Toronto, ON M5A 4R1

Job Site
70 Mill Street Condos
70 Mill Street
Toronto, ON M5A 4R1

Account ID	P.O. #	Equipment	Project
AFFORDA001	1540474		

Work Order #	Due Date	Payment Terms	Subperson	Tax Registration #
00001000-WYLY18	02/1/2018	Net 30	Bob Wilson	607054321

Details

Product	Description	Price	Quantity	Amount	Discount	T/E	Ext. Amount
Safety Pressure Relief Valve		\$541.30	3	\$1,624.17	0	T	\$1,624.17
Labour Journeyman Regular		\$110.00	5	\$575.00	0	T	\$575.00
Venting/Chlor		\$110.42	1	\$110.42	0	T	\$110.42
Sales Tax Summary				Subtotal			\$2,319.59
GST/HST ON 13.000%				\$301.28			\$0.00
Invoice Discount							\$0.00
Freight Amount							\$0.00
Total Tax							\$301.28
Freight Tax				\$0.00			\$0.00
							\$2,619.57

Invoice Description
Change 3 relief valves on 3 heating boilers and 1 on the other boiler upper zone tank. These relief valves are original on the equipment and should be changed to ensure proper operation. Job is TSM. Please contact Timothy Wallace for any issues on site.

Long service-to-cash cycles and incorrect or lost invoices negatively affect your bottom line hampering your ability to grow your business. Using a comprehensive field service management software that connects the technician with the back office will help you improve your invoicing cycle and eliminate unnecessary errors. Here are some tips to improve your invoicing speed and accuracy:

1. Invoice automation

Automate the work order process to achieve shorter service-to-cash cycles. Empower your techs to record and close work orders in real time while on-site, with the ability to generate invoices on their mobile devices. Your customers can then sign-off electronically and approve the work done, parts used, and labor time spent. Invoice on the spot, or with this information already captured in the system, your back office team can issue the invoice to the customer on the same day using automated software to save time that would have been spent on drafting and mailing invoices.

2. Line item visibility

What labor rate does a particular customer pay? Which parts of the job are covered under warranty or service contract? When you equip technicians with instant access to the right customer information in the field, they can create service tickets that speed up rather than slow down the customer approval and billing process.

3. Monitor cash flow

Once you have a system that can track invoices, you can also use it to monitor their statuses and easily track down the ones that are past due.

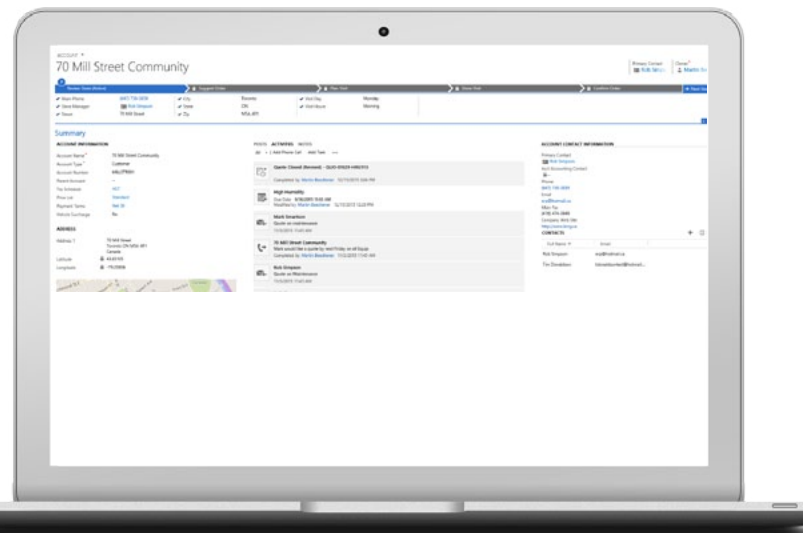
Excessive service-to-cash cycles can put a squeeze on your cash flow and profits. But, with the right technology, you can accelerate that cycle and get paid quickly and accurately every time. Never leave money at the job site again.



UNITE YOUR PEOPLE WITH KNOWLEDGE SHARING

Knowledge is power. For HVAC service leaders, knowledge sharing must be a top priority.

Older technicians are nearing retirement and HVAC contractor executives need to capture every piece of those experienced technicians' knowledge before it is no longer accessible. Companies should also recognize how powerful the collective knowledge of their workforce could be if every employee could



access it. What happens when a technician is injured or sick? People, and all of their accumulated knowledge, are a company's greatest asset. Knowledge is critically important and can have a huge impact on productivity.

Field service leaders know that their employees, especially their most seasoned veterans, have tons of valuable information. The only problem is it's in their heads where it's only useful to one person. By investing in a mobile device that connects to the back office, all that information can be captured and made available for the rest of the team. This captured knowledge becomes even more important when you have new technicians stepping up to replace an aging workforce. It's simply not realistic for everyone to be calling or texting those few "go-to" employees with every issue.

Field Service Technology enables successful knowledge-sharing for workers in the following ways:

1. Connect to technicians' expertise

Field service technology provides technicians with easy ways to access knowledge about customers and their equipment, helps improve ways of working, and facilitates problem solving.

2. Utilize pictures and video

Technicians can capture knowledge with mobile field service software through pictures or data input to use for a future task. For example, being able to capture the steps to complete a fix through pictures or video and saving that information to a mobile device can ensure that other technicians can learn from that knowledge.

3. Leverage analytics

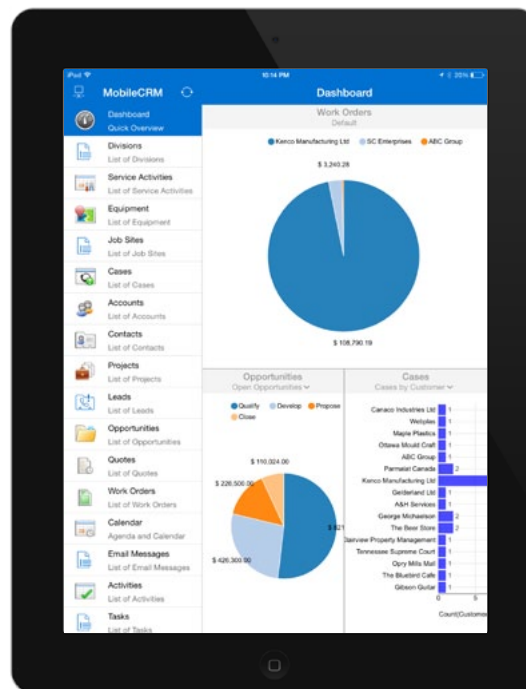
After capturing data in the field, organizations can analyze that knowledge and use it to understand their operations and become more proactive in the field.

Field service organizations have a wealth of knowledge about customers, processes, and assets but that knowledge is useless if it's not captured and available for everyone to use. It's just a matter of extracting that data from the minds of the few for the benefit of the many.



INVEST IN BUSINESS INTELLIGENCE

Connecting the knowledge of all your employees, from technicians to salespeople to executives and to the back office, is vital to properly run a field service business. The right field service management software can help organizations consolidate this fragmented knowledge and put it into the hands of the very people who can use it best when they need it and from wherever they are. Field service management software connects employees across all levels of an organization.



In order to identify revenue-generating opportunities, your company must have software that can collect the necessary data from your technicians and provide quick answers to key questions such as:

1. Is it under warranty?

What do warranties cost? Do today's warranty tracking procedures capture enough information? When does the warranty start?

2. Did we make money on that contract?

Are our service contracts profitable? How do I price service and maintenance contracts? How do I track scheduled maintenance?

3. Where does the time go?

How much time are my technicians spending traveling? How long does it take them to complete different types of work orders?

4. Do we know what is going on with our people?

Who are our best performing technicians, and why? How can I schedule and dispatch more effectively? How can I increase my technicians' billable utilization?

Once you collect the information you want to analyze, service dashboards display it in easy to read, real-time charts and graphs. Being able to link operational and financial modules offers an opportunity to have detailed visibility into both your processes and profitability. With increased transparency comes the ability to identify and target moneymaking opportunities that would otherwise go unnoticed and unaddressed.

By using an end-to-end field service management software for your company, you'll be able to focus on building up your business, increasing your profits and improving customer loyalty.

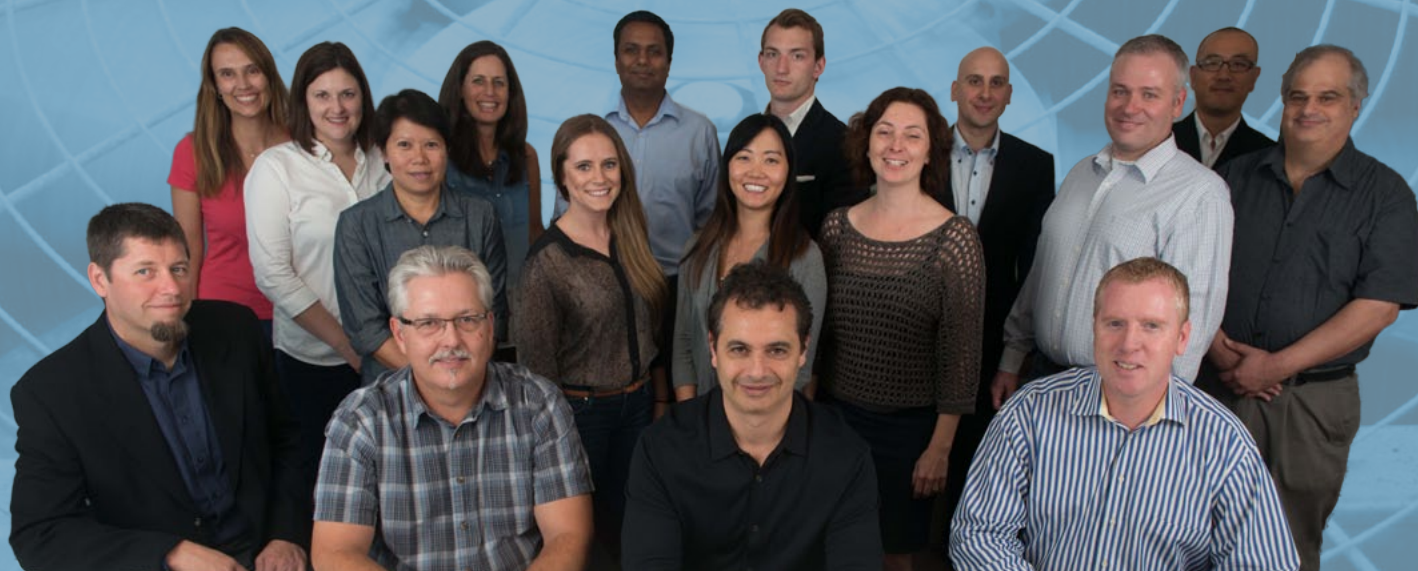
You can't be everywhere at once, but with the right software you can run things as if you are.





FIELDBOSS
CONTROL THE FIELD

Microsoft Partner
Gold Enterprise Resource Planning
Silver Customer Relationship Management



FIELDBOSS is an end-to-end field service software solution built on the Microsoft Dynamics platform. With over 100 HVAC specific features and technological innovations, it is the new standard in HVAC contractor management solutions.

Use FIELDBOSS to streamline operations and:

CONNECT TO YOUR CUSTOMERS

When you listen to, learn from, and adapt to your customers' needs, you make more money and they get more value.

CONNECT TO YOUR EMPLOYEES

When your employees collaborate and leverage valuable information across teams, you are more competitive.

CONNECT TO YOUR INDUSTRY

When you identify regulatory developments and issues early, you are prepared for and can benefit from change.

ABOUT FIELDBOSS

FIELDBOSS is an end-to-end field service software solution built within Microsoft Dynamics. It is the easiest way to connect to your customers and their equipment, streamline complex operations, and empower your staff.

FIELDBOSS is led by a team of CPA's and Certified Microsoft Technology Specialists who have been providing the highest level of service in the Microsoft solution consulting industry since 1989.

www.FIELDBOSS.com