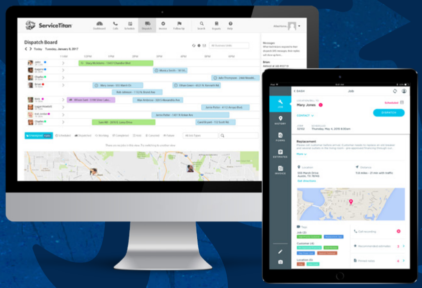
PREPARING FOR
SERVICETITAN APPOINTMENTS



Use this checklist to help prepare your company for the upcoming release of **Appointments** on ServiceTitan. Multi-day job scheduling and management has never been easier with the introduction of appointments to our software, and—with preparation to understand new improvements to your workflows—this release can provide a big boost to your team's functionality and efficiency!

BEFORE RELEASE | WEEK OF RELEASE | DAY OF RELEASE | AFTER RELEASE

- ☐ Attend or watch the *Appointments Announcement Webinar* conducted on 10/16/2020.
- ☐ Attend or watch the *Get Ready for Appointments Webinar* on 12/3/2020.
- ☐ Read through the *Appointments FAQ document* in the KnowledgeBase.
- ☐ Read through the Appointments Reporting Impact Guide (coming soon)
- ☐ Schedule a *round table meeting* with leadership at your company to discuss the upcoming appointments release. Document and discuss the workflows for the following roles:
  - ☐ *Service Technicians* - How often do they work multi-day jobs or partner with multiple technicians today?
  - ☐ *Sales Technicians* - How do they currently document the number of days of installation or service work required on the estimates they sell? If an install coordinator manages this, what's the average number of days required for each installation?
  - ☐ *Install Technicians* - What's the average size of your installation crews? How often is work completed early?
  - ☐ *Maintenance Technicians* - How often do they work multi-day jobs or partner with multiple technicians?
  - ☐ *Dispatchers* - How often are they scheduling out multi-day work? Do they manage projects frequently?
  - ☐ *CSR* - Are they responsible for booking multi-day jobs or would dispatchers always hold that responsibility?
  - ☐ *Install/Sales Coordinator* - What is their current strategy for managing multi-day installations? Do they rely on "Done For Now" or rescheduling jobs over day by day?
  - ☐ *Business Manager/Leadership* - What types of reports and metrics do you track on a daily basis today? What are the current reporting gaps you experience around multi-day jobs?
- ☐ Conduct your own Appointments announcement meeting with your company in whatever setting fits your culture. Talk about appointments in your team meetings and send out a follow-up email to the team for their reference. You need to make your team aware that change is coming and that your leadership has a plan to make the transition as smooth as possible.

  Meet with your impacted teams above individually and walkthrough the documentation your leadership put together during the round table meeting. This check is to ensure that you have the full picture of your team's daily procedures and to give a more intimate setting for you to soothe any worries for these heavily impacted roles
- ☐ Instruct your staff to complete the *Appointments Release Learning Collection* in the Academy. There are three courses in total that are designed for specific roles in your organization. They are intended for those as follows:
  - ☐ *Introducing ServiceTitan Appointments* - This course is designed to be an introduction to all office staff at your company. It covers the major impact of this release on the CSR and Dispatcher workflows at the typical office and explains the functionality around managing appointments. At minimum, have your entire CSR and Dispatching staff take this course (but your entire office team is recommended).
  - ☐ *Managing ServiceTitan Projects with Appointments* - This course is designed to build upon the learning in the first course and focuses specifically on the impact of the Appointments release on ServiceTitan projects. It discusses changes to project structure for both small and large installations. Anyone who is involved with managing projects or the jobs inside of them should take this course in addition to the first course listed above.

Continue ›

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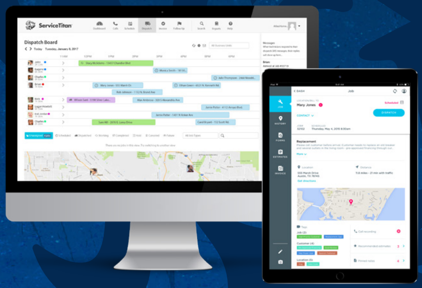

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- ☐ *Completing Visits with ServiceTitan Appointments* - This course is designed for your technicians to learn how to correctly close out visits on the ServiceTitan mobile application with the release of appointments. All technicians should take this course.

- ☐ Conduct a second round table meeting with leadership at your company once leadership has completed the training courses. In this second meeting, revisit the workflows documented in the first to now outline future workflows with appointments layered in. Document the standard workflows for the following scenarios at minimum and be sure to consider both the office and mobile portion of each workflow:
  - ☐ *Single-Day Service Jobs* - No additional days of work are required
  - ☐ *Multi-Day Service Jobs* - Multiple days of work are required.
  - ☐ *Lead-Generated Installation Projects* - Be sure to consider the project structure that the installation will be booked into.
  - ☐ *Rescheduling, Pausing, and Cancelling Appointments* - Who will be responsible for these activities? When would you expect them to use each option?

- ☐ Host a meeting with each impacted team to walkthrough the workflows outlined during the second round table leadership meeting. *Pro Tip:* Have your team actually walk through those workflows together in the NEXT training environment during the meeting.

- ☐ Conduct a bi-weekly meeting with leadership to continue refining the workflows outlined for your business as your staff continues to practice in the training environment.

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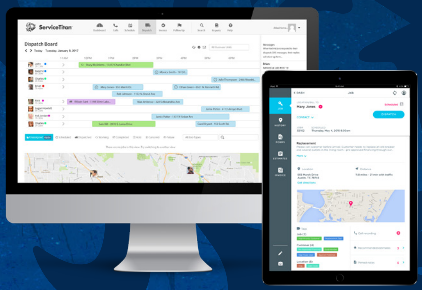

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WEEK OF RELEASE

- ☐ Send out reminder emails to all teams of the upcoming change.
- ☐ Circulate the workflow documentation your leadership has been refining throughout the pre-release period.
- ☐ Decide on a point of contact for each team in case of a question or issue the day of the release.

DAY OF RELEASE

- ☐ Have each leader huddle with their respective teams to answer last minute questions, remind the teams where to find information on workflows, and who to call with questions along the way.
    - ☐ Run through a final demonstration of each team's respective workflows in NEXT in each of those team huddles to refresh your team prior to running the first jobs of the day.
- ☐ Handle incoming questions and keep a running list of those questions that you didn't account for in the original workflow documentation.
- ☐ Keep a positive mindset! Change is never easy, but adequate preparation will always help ensure a smooth transition. Pro *Tip:* We predict a large influx of questions for ServiceTitan Support on the day of the release. We suggest you make note of questions that are not blockers for your business and focus instead on coaching your team through their first day using appointments!

DAY OF RELEASE

- ☐ For your ***Technicians:***
    - ☐ Sync data the night before your account gets updated or all unsynced data will be deleted
    - ☐ Confirm that your techs know their username and password (or know ***how to reset their password***) so they can log back in after the update
    - ☐ Publish the ***job closeout walkthrough video*** in the ***Content Portal*** for your techs to ensure they know how to use the new closeout screen
- ☐ For the ***office:***
    - ☐ Schedule the new ***Upcoming Jobs with Appointments report*** using the "Jobs with Appt Date" filter. We recommend scheduling the report to send daily.
- ☐ For your ***CSRs and Dispatchers:***
    - ☐ ***Review training on changes to their workflow***

AFTER RELEASE

- ☐ Monitor your staff's adoption to the workflows outlined by leadership. Correct workflows where needed and improve any inconsistencies uncovered by your team.
- ☐ Keep documenting irregular scenarios to ensure you grow your standard list of procedures for staff to reference whenever needed.
- ☐ Identify a member of your staff to own cleaning up any inflight multi-day jobs and projects that existed prior to the release as they may require appointments to be scheduled inside of each job to properly reserve the correct amount of time on the schedule for those in progress multi-day jobs.