



# Turning Service Technicians into Service Managers

 Running a Better Business Series

**Trimble**  
Construction

## For most service contractors, there are two types of work that fuels their success.

On one hand, new construction, installation and in some cases design-build work is a good source of one-time revenues. Typically working as subcontractors on larger projects, service contractors will build out electrical systems, plumbing or duct work in new building or renovation projects. Or they might install heating and refrigeration units, overhead and outdoor lighting units and more as part of the project. These projects are great for boosting profits. However, ask just about any service contractor and they'll tell you it's the recurring service contracts that sustain their businesses for the long haul. These service contracts—covering the regular maintenance, repair or replacement of electrical and mechanical systems and equipment—bring in a continual source of revenue, guarantee regular work for the company's technicians and electricians, and provide steady cash flow when new contract work is not available.

That's why ensuring that service contracts are dutifully honored and that technicians have the tools needed to be their own managers on the work sites is vital. Since technicians are service contractors' spokespeople in the field, they need to be armed with the ability to do their jobs quickly and correctly the first time, ultimately pleasing the client and building longterm relationships. Thankfully, today's technology is making it easier to accomplish that goal.





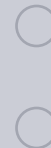
## Streamlining the Back Office

Achieving superior service performance starts in the back office. This is where service contracts and actual work has traditionally been managed. In the past, service contracts would have to be managed via manual methods like paperwork and spreadsheets. Creating work orders, scheduling technicians, finding customer or site records when needed, or gathering documents for annual renewals often required countless hours of labor.

Today, leading service contractors rely on powerful ERP software with specific features designed to streamline service work. Work orders can be created with a few clicks of a mouse, relying on powerful client contact databases to fill in historical and site information. Intuitive dispatch boards can schedule technicians and allow the flexibility to change work on the fly based on priority or availability. Service contracts themselves can be automatically drafted and sent out for review and renewals, saving countless hours of preparation.

And, as these software programs move to the cloud, these systems can be delivered in a browser or online portal for anytime, anywhere access for permissioned users. This means back office tasks are no longer tied to a physical work station. Information can be updated in real time, providing an instant look at how service work is being performed and how cash flows are affected.

“I have a good sense these days of what is going on in the organization, and I trust the information that I’m getting,” said Hope Voight, COO of Tweet Garot, one of Wisconsin’s largest mechanical contractors, and a user of the service management capabilities in Trimble Viewpoint’s Vista™ ERP Software.




## Mobile Empowerment for Technicians on the Go

The advent of cloud-based software has also provided service contractors with mobile applications that allow their technicians in the field to selfmanage their work, improving speed, accuracy and customer satisfaction.

In the past, technicians would be dispatched to locations with a work order. If that work order was simple enough, they could perform the work and be on their way. However, outside of regular, routine, maintenance, most service work is not that cut and dry. Technicians can run into new problems not identified, parts that need to be specially ordered or retrieved, the need for historical site data from previous visits to identify trends, and much more. Radioing back and forth with back-office staff trying to address a stable of technicians' concerns and needs is not ideal.

That's why service contractors are finding real value in mobile applications that allow technicians to access the data they need. [Service Tech Mobile](#), a solution that is part of Trimble Viewpoint's Spectrum® Construction Software, provides technicians with the tools to manage work orders, log their time, track parts and inventory, assign and update labor, review and create notes on work orders, upload jobsite photos and forms, and more—all from the field on their mobile device. The simply log in and start working.





Mobile solutions like this, and [Trimble Viewpoint's Field Service](#) solution for Vista, also allow for electronic signature capture—and even payments—right from the field, meaning work can get done quicker and payments processed sooner. This means fewer delays from lack of information or approvals and mitigates holdups with payment processing.

“We always feel like the people closest to the work are the ones that make us successful,” said Sonja Rheame, vice president of operations for Portland, Ore.-based Christenson Electric, in a recent Spectrum client video. “We try to eliminate any barriers between our field electricians and the customers themselves. Our role is to make sure they have the right tools and equipment to do the right job for the customer.”

Meanwhile, cloud computing has given the customer more visibility and involvement in the work being done as well. Online client portals can let customers log in and schedule work, update status and times, see how work is progressing and even make payments or supply documents when needed.

”

**We try to eliminate any barriers between our field electricians and the customers themselves. Our role is to make sure they have the right tools and equipment to do the right job for the customer.**

—Sonja Rheame,  
Vice President of Operations,  
Christenson Electric

## A Win-Win Scenario

Streamlining service work through leading-edge technology can have long-lasting benefits. Like an electrician without pliers, a service contractor that isn't equipping its technicians with the right mobile technologies and solutions is going to have a greater difficulty getting the job done right in the field and will ultimately lose valuable business to those that can.

Empowering technicians by providing better access to information and more authority to make decisions in the field not only increases their commitment to the work that needs to be done, it bolsters their contribution to the company's overall health. Technicians can focus on the actual work rather than the paperwork and customers will enjoy a deeper level of satisfaction with the speed and accuracy of the work being done.





Visit us at [Viewpoint.com](https://viewpoint.com),  
call [800.333.3197](tel:800.333.3197),  
or email [productinfo@viewpoint.com](mailto:productinfo@viewpoint.com)  
[to learn more or see an informative demo.](#)





## ABOUT TRIMBLE VIEWPOINT

Trimble Viewpoint, a Trimble Division, is a leading global provider of integrated software solutions for the construction industry. Trimble Viewpoint software enables customers to integrate operations across the office, team and field to improve project profitability, enhance productivity, manage risk and effectively collaborate across the broad construction ecosystem. With nearly 8,000 clients, including more than 40 percent of the ENR 400, Trimble Viewpoint's innovations are transforming the construction industry by fully integrating operations across financial and HR systems, project management tools and mobile field solutions.

For more information, please visit [Viewpoint.com](https://viewpoint.com)

©2021 Viewpoint, Inc. All Rights Reserved. Viewpoint®, Vista™, Spectrum®, ProContractor™, Jobpac Connect™, Viewpoint Team™, Viewpoint Analytics™, Viewpoint Field View™, Viewpoint Estimating™, Viewpoint For Projects™, Viewpoint HR Management™, Viewpoint Field Management™, Viewpoint Financial Controls™, Viewpoint Field Service™, Spectrum Service Tech™, ViewpointOne™ and Trimble Construction One™ are trademarks or registered trademarks of Trimble Inc., Viewpoint, Inc., or their affiliates in the United States and other countries. Other names and brands may be claimed as the property of others.



**Trimble**  
Construction