



**SERVICEBENCH<sup>®</sup>**  
INTEGRATED SERVICE MANAGEMENT



**CLOUD-BASED SOFTWARE HELPS PRODUCT INSTALLATION COMPANIES  
MAXIMIZE OPERATIONAL EFFICIENCIES**





“Today, contractors are often responsible for the installation of everything”

## THIRD-PARTY CONTRACTORS

Third-party contractors are increasingly handling product and service installations at businesses and residences across the country. Today, contractors are often responsible for the installation of everything from consumer electronics, appliances, carpeting and roofing to digital signage and ATM machines.

Many product installation companies serve specific vertical market segments, such as home improvement, IT, and commercial signage. According to Gartner’s annual Magic Quadrant for Field Service Management report, third-party contractors that specialize in installation are part of a larger ecosystem of companies that provide installation, repair, and/or maintenance at customer locations.

Whether they serve the B2C or B2B markets, or both, installers are using cloud-based software solutions to manage different types of customer accounts, and to easily interface with the company selling the product or service being installed. Demand is also increasing for software that integrates technologies such as artificial intelligence, streaming video, and the Internet of Things (IoT).

Third-party contractors handling residential and commercial installations include large companies — such as DirectSat USA, Field Nation, and Installs, Inc. — as well as a myriad of independent installation providers. All of these installation companies are part of the so-called “last mile” of the sales fulfillment process. This is the fulfillment step in the sales process, when a product or service is installed at the end-user’s home or business.

Because third-party installers are an extension of the sales organization they represent, they have to be able to manage the installation ecosystem while, at the same time, ensuring that the end-user is happy. “If retailers fail to meet customer expectations with a delivery or product installation, it’s highly unlikely that shoppers will give them a second chance,” observes a report by Retail TouchPoints.



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Gartner predicts that by 2020, 70 percent of field service organizations will cite customer satisfaction as one of the primary benefits of using field management software. “There is more at stake than just a need for efficiency,” says Louis Rose, vice president and general manager of ServiceBench, a cloud-based software platform. “The way in which an installation is handled, from start to finish, can delight customers or sour them on a brand.”

## FIELD MANAGEMENT SOFTWARE

Today, thanks to the IoT, installation companies are using cloud-based solutions to manage tasks ranging from initial response to the final billing paperwork. Always-on connectivity facilitates the use of an integrated software platform to help streamline scheduling, ensure on-time delivery of materials, improve operational performance, manage costs, and generate installation reports.

“The IoT is transforming the field service industry in ways that most analysts — and practitioners — could not have foreseen just a few years ago,” observes analyst Bill Pollock, president of Strategies for Growth. “While most of us were focusing on machine-to-machine communications and the prospects for utilizing augmented reality, the IoT was already beginning to be leveraged into smart systems and connected field service solutions.”

Installation providers, according to another report from Gartner, need to understand the customer journey, and then map it to identify high-impact internal capabilities that are currently lacking. In addition to understanding customer journeys, installation companies need software and communications technology that can be tailored to meet the needs of B2C and/or B2B customers.

When it comes to installation work, both residential and business consumers are setting a high bar for companies installing products and services. For example, the Gartner report notes, “companies that serve residential consumers must adapt to growing expectations for quicker customer onboarding, shorter arrival times, and better customer experiences.”



## SMART SOLUTIONS

Product installation companies are increasingly migrating to solutions that offer user-friendly software for managing the entire spectrum of installation-related activities. While installers have historically relied on a combination of applications, the quintessential solution is a single cloud-based platform. Every company providing installation services needs a proven system for managing jobs, work orders, and customer service.

“Interfacing with the customer, whether it’s at a residence or a business, needs to be frictionless from the time of initial contact all the way through to post-service follow-up,” says Rose. “Installation specialists today are working with software providers that can provide technical expertise, as well as proven tools for delivering consistently good customer experiences.” Field management software provides installation companies with a single tool for scheduling jobs and managing the entire installation process. These software solutions are also being used to provide a communications bridge between installers and the companies that initiate the sales. Installation companies also want software solutions that are capable of interfacing with the systems used by their sales partners.

Equally important is a cloud-based solution that is economical, and that can scale over time.

“The proliferation of cloud-based field service management solutions has moved many organizations from the historical perpetual license pricing model to a much more manageable subscription basis pricing mode,” says Pollock. “This also is having a significant impact on facilitating the entry of smaller and medium-sized organizations into the world of the IoT and smart solutions.”



## MEETING CUSTOMER EXPECTATIONS

One of the most critical needs for installation companies is delivering results that satisfy both their sales partners and end-users. Installation companies are using their cloud-based software solutions for data analysis in order to proactively identify problems and optimize operations and customer service.



“Smart use of data is critical to winning the last mile”

“Smart use of data is critical to winning the last mile,” according to Retail TouchPoints. For example, “consistent reports of installation issues can pinpoint problems, either with the product itself or the people doing the installing.”

Cloud-based service management solutions are also helping installers reduce costs by providing tools for customer management, including self-help and self-scheduling options. Once the initial customer contact is made, it’s important to have software that can streamline order management for all types of installation scenarios.

Installation companies also are using software for visual call scheduling, route optimization and centralized dispatch capabilities. Back-end connectivity is also important. This includes, for example, the ability to manage inventory and order material through an automated process that connects directly with supplier systems.

Reporting and analytics are additional software features that installation companies are using in order to streamline management and optimize customer service. Installers increasingly want a view of everything from the cost of job to the overall financial performance of the company.

Installation companies also are using on-demand reporting and dashboard-driven metrics that are easy-to-use and readily accessible. Moreover, third party installers are gravitating toward software that easily integrates with post-sales service activities, such as customer service surveys.



## THE COLLECTION OF CUSTOMER FEEDBACK IS OF UTMOST IMPORTANCE

In fact, customer surveys are an important way in which installation companies are using technology as part of an end-to-end solution. Social media enables end-users to quickly share experiences, good and bad. Using a software system that can facilitate the collection of customer feedback is of “utmost importance,” according to Gartner.

Ultimately, software is helping installation companies optimize their operations by using technology frameworks that help them manage scheduling, delivery, billing, and ongoing customer interactions.

Smarter software can provide installation specialists with measurable results, ranging from lower operating expenses to more efficient workforce utilization. For installation contractors, choosing the right cloud-based solution ultimately means better efficiency, more satisfied customers, and higher profitability.

Learn more about how ServiceBench can help you implement a business management system to turbocharge your operations.

## BENEFITS OF CLOUD-BASED SERVICE MANAGEMENT SOLUTIONS

Cloud-based service management software solutions facilitate transactions between installers and their sales partners, as well as streamlining interactions with end-user customers. In addition to integration, other important benefits include improved efficiency, analytics, security, and support.

## INTEGRATION

When it comes to integration, product installation companies need reliable software that can be easily integrated with various different systems used by their partners. Installers need a single solution that enables them to receive and manage jobs from their entire ecosystem of sales partners.

## EFFICIENCY

Cloud-based software solutions help installers optimize their operational efficiency. This ranges from streamlining transactions to managing customer relationships. Business management software also helps optimize communications and facilitates transactions across the entire supply chain.

## ANALYTICS

Another key benefit of using cloud-based software is the ability to mine data for actionable analytics and business intelligence. It's important to have instant access to key performance indicators (KPIs) that measure everything from costs to customer satisfaction. The best software solutions provide customizable reports that are user-friendly and easy to understand.

## SECURITY

Cloud-based software that runs on secure PCI-compliant servers is essential for protecting against data theft. The most beneficial cloud-based installation management solutions also offer data redundancy and disaster recovery tools. Another feature that can help ensure security is advanced analytical algorithms that identify fraud by flagging potentially harmful activity.

## SUPPORT

Companies providing installation services need 24/7 access to support services that help ensure optimal performance. Installation companies should look for a software solutions partner that can provide real-time access to technical experts. In addition to software, a full-service partner should help installers improve efficiency in areas such as ordering material, delivery and installation, billing, network administration, and analytics reporting.

Learn more about how ServiceBench can customize a cloud-based service management solution to help your installation company optimize its operations.

**Getting Started** Visit us at <https://www.servicebench.com>

Schedule an obligation-free demonstration [servicebenchsales@asurion.com](mailto:servicebenchsales@asurion.com)  
or call us now **443-539-9752**

