

PART 5 & 6

HOW TO START (OR GROW) A TRUE SERVICE DEPARTMENT



By Greg Hayne, Roof Management

Part 5 – Just What Is “Great Service?”

Last issue we established that “Great Service” and “Great Communication” are essentially the same thing. We gave you a couple of simple suggestions that will make a difference in your company and that everyone can and should implement. Here is another example of what great communication is about. To a knowledgeable building owner, your service invoice for a leak repair is a communication document and not just a request for payment.

You need to show them what you did (with before and after pictures), you need to show them where you did it (with some sort of marked drawing or aerial), and you need to get it into their hands quickly.

Would it be OK with you if you dropped your car off for service on Monday morning and when you picked it up the invoice said “serviced car. \$842.25?” Or might you want to know what they did and where they

did it—an itemized invoice? You should do the same for your customers. (I am aware that many roofers do not wish to itemize their invoices because they are afraid that their customers will complain when they see a charge of \$14 for a tube of caulk or \$45 for a gallon of glue, etc. I think this is a cop out and reflects a lack of the setting of expectations, but there is no question that this will come up. So, you dropped your car Monday morning and they call you Monday afternoon and say, “Your car is done. We think we will have the bill added up and ready so you can pick up the car by Thursday morning.” Would that be OK? Of course not! How long does it taking to get that leak repair invoice into your customer’s hands? In the mind of your customer, it is exactly the same thing and the only reason you are getting away with less than timely billing is because all of your competitors are crappy at it too.

Here is what I have found with my work with contractors. If you can get a properly documented invoice into the hands of your customers within 24 hours of the time the work order is completed, you

are going to get far fewer phone calls from customers asking you if you have been there yet and what you did. You are going to get your money faster and you are going to get more of that customer's work. To get an invoice in a customer's hands within 24 hours you need to be emailing the invoices and all backup information in a single PDF. (No loose pictures.) And, you need to be doing this so that your staff is not suffering massive stress and chaos to make it happen! This can be challenging for most contractors to achieve because their processes and procedures aren't set up to make it happen.

Part 6 – Smoothing out some bumps

Last issue we talked about the importance of getting repair invoice into your customers hands within 24 hours of work completion because a knowledgeable building owner views your invoice as a "communication document," not just a request for payment.

When most contractors try to get their invoices out within 24 hours it creates massive stress and chaos in the service department, because the processes and procedures in place were not set up to do that. Let's talk about what needs to happen to make invoicing within 24 hours something that is actually easier to do than what you are doing now.

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Understand that 100% of the information you need from the field must, 100% of the time be turned in, daily. Your field techs need to be trained to understand that "fixing the leak" is not their only role. They also need to document what they did with a marked aerial or drawing and appropriate photos. They need to be trained to understand what "appropriate photos" actually mean. (Would you take a kid off the street and turn him loose doing detail work on a TPO reroof with a leister hand welder because he could turn it on? No?! Then what makes you think your repair crews are qualified to take photos because they can

point a camera (or phone) at an area of the roof and take a picture? Until you get the field crews turning in what you need 100% of the time, in a timely way, you are going to spend more time asking for stuff and fixing what they send than preparing invoices. This is a challenge (it is the challenge) that must be addressed first.

A word about apps/software. The three best known service department apps in our industry are (in alphabetical order), Dataforma, FCS and Roof Logic. There are others. Do not think that purchasing one of these apps will make your invoicing faster. It will not, until you have a proven process that works.

"Technology applied to an efficient process makes it more efficient. Technology applied to an inefficient process makes it more inefficient." --Bill Gates "

In addition, if you are going to email an invoice with all documentation to a customer it needs to be in a single PDF. When you send an email that contains the invoice, a marked aerial, a bunch of photos, all as separate attachments your "packet of communication" can easily become separated and inconvenient for the customer. (Remember, customer service is about making things easier for the customer, not yourself.) You will need software that can arrange your photos into a single document and another piece of software that will combine various PDFs into that single PDF. These are not hard to find in the marketplace. Until the info coming in from the field is reliably and accurately delivered, everything else in prompt invoicing will be a struggle. But as the quality of what comes in improves, you will quickly see the difference it makes.

Greg Hayne is owner of the [Hayne Coaching Group](#). Greg helps contractors find and implement better, smarter, more innovative ways to work. His proven Creating Great Service training, support and implementation program helps commercial roofers grow their service departments. His ESE Peer Groups bring non-competing roofers together multiple times a year to share best practices, solve common problems and tip the competitive landscape in their favor in a big way! Greg is also an EOS implementor, helping select contractors get the most from their EOS/Traction experience.

