A photograph of several business professionals in suits gathered around a table, looking at a tablet computer. The image is slightly blurred, focusing on the hands and the device. A blue semi-transparent banner is overlaid on the bottom half of the image, containing the title text.

# The impact of Preventative Maintenance Systems on Customer Satisfaction

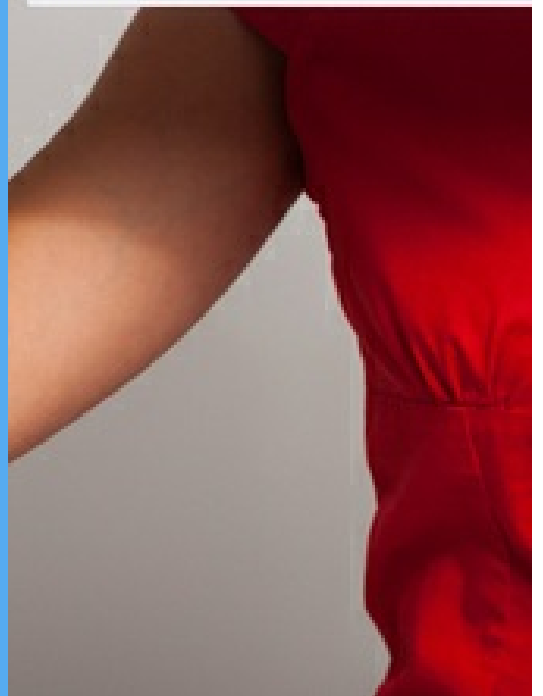
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# Introduction



A good preventative maintenance plan keeps equipment and your customer relationships in excellent condition. For your customer's equipment, preventative maintenance keeps things moving smoothly, ahead of repairs.

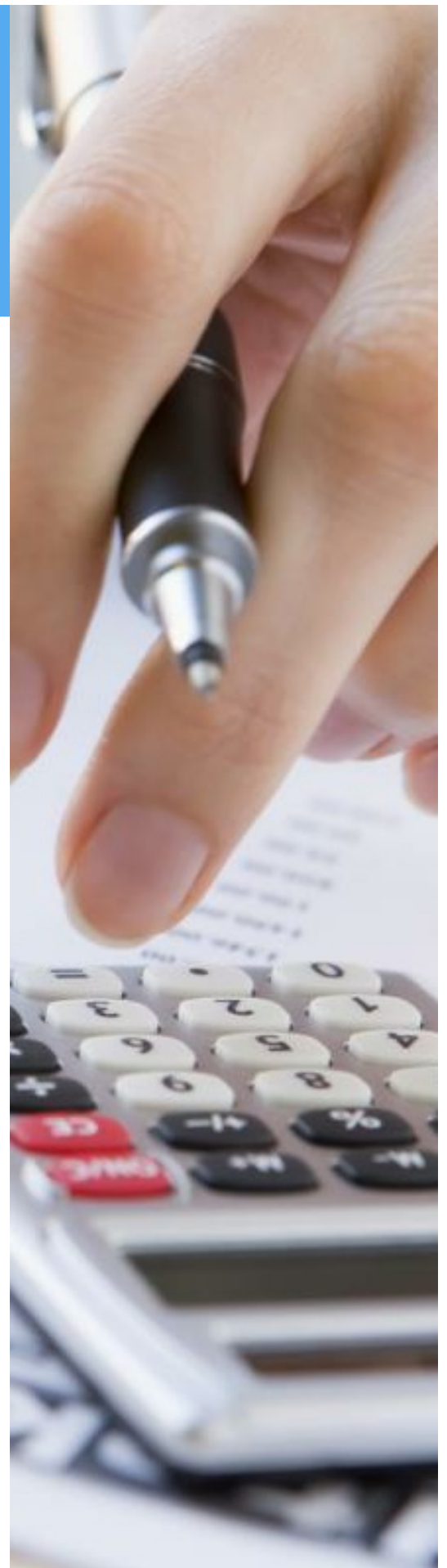
What is not always as obvious is how a good preventative maintenance program is also the key to maintaining a sustained relationship with your customers. Through billing, scheduling, inventory insights, mobile, maintenance, technician monitoring, and empowering the technician, preventative maintenance allows you to be proactive with your customer. You no longer have to worry about every call being an emergency. You'll gain control and set the pace for your customers while reducing inventory carrying costs. And your customers gain piece of mind knowing that you are "on the *job*."

# Billing and Cash Flow

One of the challenges many businesses must address is tracking what parts and services are included in a preventative maintenance contract and which are not. Most items and services are billable under some contracts but not billable under others. Being able to differentiate for each customer and customer location is critical. Implementing coverage codes allows you to take control – you might, for example, have a contract in place where you charge the customer a set amount per year to do a service. Beyond that, the labor and parts may or may not be billable when the technician goes out to do the work. With coverage codes, you can set up different scenarios for each customer, making tracking billable versus unbillable hours that much easier.

Well-defined coverage codes and contract tracking then provide you with visibility into incoming cash. Planned spending on inventory is also facilitated through a well set up contract system. With it, you are able to forecast demand for spare parts inventory and schedule your purchasing to take advantage of quantity, timing, or other price breaks.

With SouthWare's preventative maintenance billing, you are also able to look at multiple types of time-frame schedules through frequency codes. These codes give you flexibility in the way you create and sell your maintenance contracts by using multiple time intervals to define your contract and billing periods. SouthWare's system offers numerous time

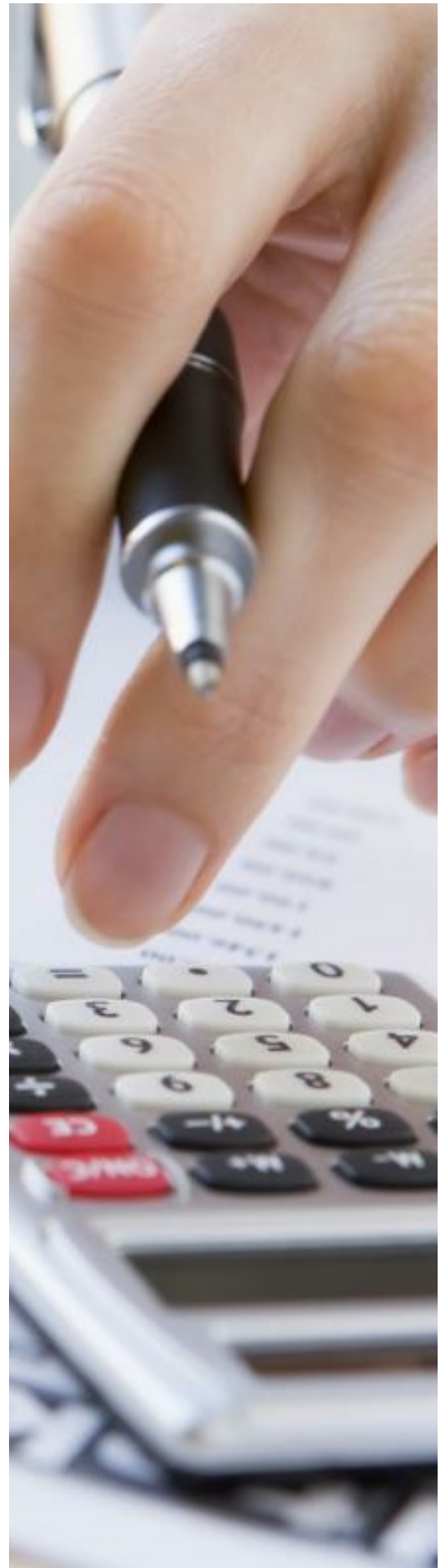




schedules – monthly, quarterly, the first of the month, the fifteenth of the month, annually – as well as allowing users to configure their own frequency codes.

Using frequency codes, you can schedule billing periods as well as service periods. Many businesses use both the periodic billing and service features, which gives you the power to generate preventative maintenance billing that might occur only annually or quarterly.

Your preventative maintenance system, while helping your cash flow, also improves your customer relationships by giving you flexibility to build contracts the way your customers want or need them – keeping you from forcing everyone to fit into only a few pre-defined approaches.



# Preventative Maintenance Scheduling

preventative maintenance scheduling's purpose is to place your customer's equipment on a schedule to keep equipment in operating condition while giving you and them the insight into any capital expenses that may be necessary to replace their most critical equipment. Simply put, preventative maintenance scheduling provides businesses with an equipment-servicing schedule, a list of supplies for jobs, and what to do when they get to the job site. Businesses know what inventory and services they need with a few presses of a button.

Maintaining and executing on a scheduled maintenance timeline allows you to proactively service customers – building trust and loyalty. A good scheduling solution ensures that you don't fall behind and that machines and equipment are properly maintained. It also ensures that the customer isn't calling you to get repairs.

We've seen cases of businesses using spreadsheets or even index cards to run manual scheduling processes. If you have a large number of customers, managing your schedule via a spreadsheet or index cards in folders is not efficient and, frankly, just doesn't work. A good scheduling solution, like the one SouthWare provides, lets you have access to every piece of data about a customer quickly and easily. When you set up a piece of equipment, you



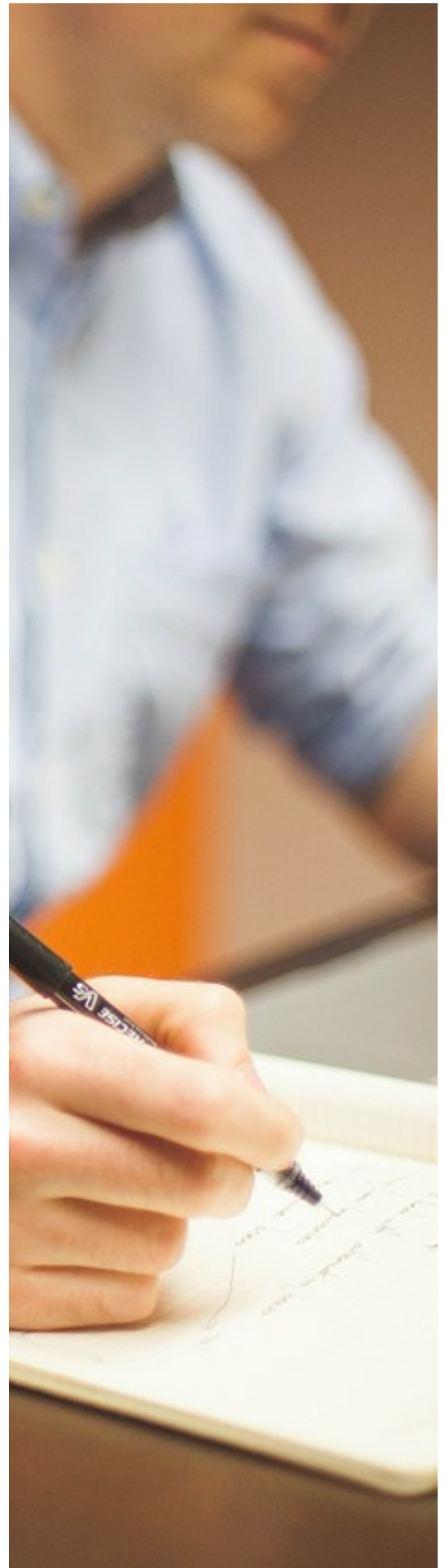
know what you have to do with it and when.

When you order spare parts or consumable replacement products in advance, you can tag them so that the right equipment and parts are ready to go when the scheduled time comes. This reduces multiple service calls by ensuring that special size filters, specialty equipment, etc. are pre-ordered and available when needed. With a good scheduling system, there's absolutely no reason not to have the relevant parts on hand, and being able to service quickly improves your customer's experience.

For example, many service companies don't keep all their customer's replacement parts – items such as cartridges or filters – in stock. This is especially true for non-standard sizes. Typically you'll need a few weeks' notice to order non-standard parts. Having the scheduling tool generate the next month's maintenance schedule will create a shopping list, so to speak. The system/shopping lists tell the technicians where they need to go and what parts they'll need when they get there. It also provides a detailed list so the parts department/purchasing manager knows what to order and when.

In other cases, a tech will get a non-scheduled service call. preventative maintenance scheduling allows you to look and say, "Does this customer have upcoming maintenance?" If they do, you can tell the tech, "This customer has some cartridges here that are scheduled for next week, but since you're already going out there, you can do them now."

You may live in a part of the country where you need different schedules based on the seasons. The ability to have multiple types of contracts means you can have a monthly one to do "X," a semiannual one to do "Y," and an annual contract to do "Z." The ability to have multiple frequency schedules that generate dispatches ahead of time is a key

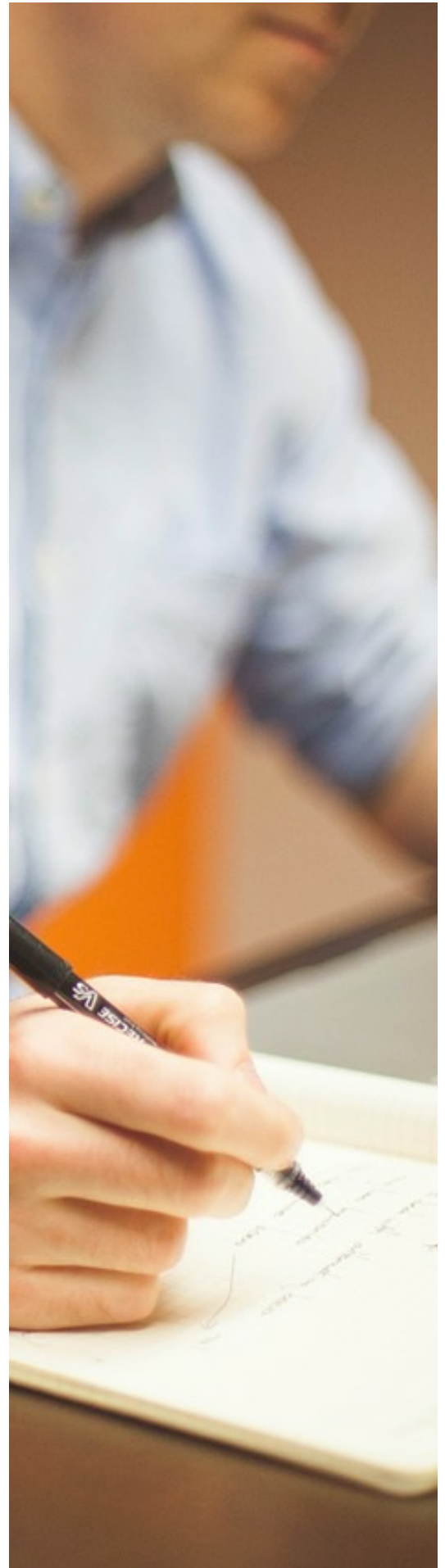


component of a good preventative maintenance scheduling solution.

You may also want to tie preventative maintenance to specific pieces of equipment and set a schedule based upon this piece of equipment. SouthWare's customers benefit from a system that allows them to set a frequency schedule. For example, you want to contract with a commercial account to go in on a monthly or quarterly basis to do preventative maintenance on a unit. There are a lot of regular, frequent maintenance activities necessary for proper equipment operation. You can schedule them depending on your availability, the equipment needs, or a combination of both.

Finally, one additional benefit of SouthWare's scheduling tool is that it shows you the future. With it, you can simply ask, "Where do I have to go next week?" and the software will generate the schedules for the dispatch department to submit; it can even include a list of materials a tech should take with them.

Ultimately, a great scheduling solution gets rid of many of the surprises that disrupt a service business. It keeps your customers and your employees happy due to predictability.





# Inventory

Having the right inventory on hand for your preventative maintenance contracts may be the biggest influence on customer satisfaction.

Consistently getting the job done, correctly and in one visit, builds confidence and trust from your customers – it shows you have your act together.

When starting with a client, make an inventory list of all their equipment. Make sure to include the condition of the equipment and rank per the piece of equipment's importance to their operations. Once you do this for your client, your contract and preventative maintenance schedule remove all the guesswork from ordering and maintaining spare parts and replacement parts inventory.

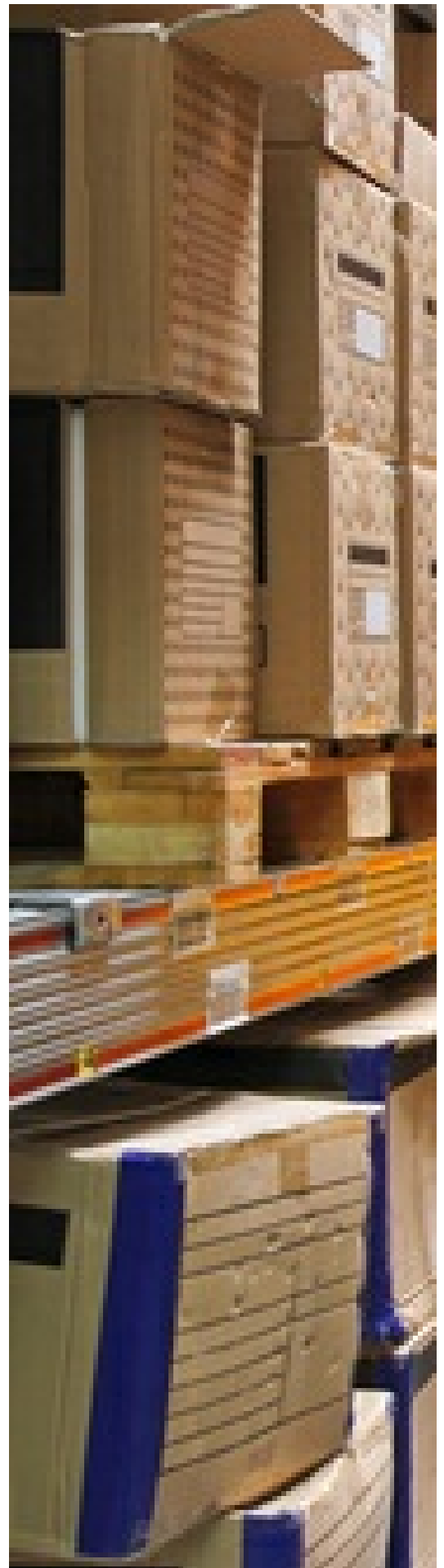
Having this inventory visibility is critical to obtain the best pricing and the best margins. Rather than tying up money in a large stock of unnecessary items, you can take a just-in-time purchasing approach and get the best prices because you can bulk similar client needs together when buying the stock you need. If you have to buy a single item because the one you had in stock was the wrong size or model, you've wasted time and money.

By taking the guesswork out of ordering, the SouthWare system empowers you to tell a supplier, for example, that you need two hundred "A" switches, fifty "B" switches, etc. Although the switches needed may be for ten different companies scheduled for that month, one big list allows your suppliers to put together one big order for you,



allowing you to obtain quantity discounts and save on shipping costs.

This approach also keeps your warehouse from being full of "just in case" inventory items. With effective preventative maintenance contracts, it's unnecessary to have every possible parts combination in stock – especially if some of those parts are unusual and might sit there for years without being used. Now you can look a month ahead and say, "Okay, I'm going to need "X" part." This allows you to pool your jobs together and, as an added benefit, your employees can walk into your warehouse without tripping over excess stock.



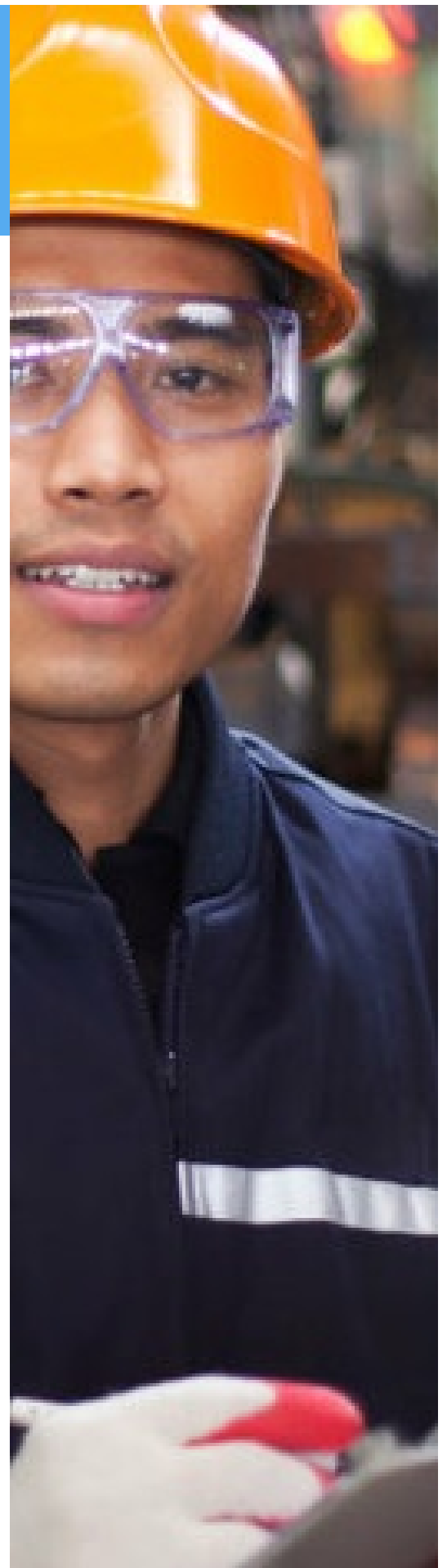
# Mobile Tech

While every day may start with a plan, it rarely ends on the same plan. Working off preprinted service orders doesn't always work, so mobile technology picks up the slack. Once you've scheduled preventative maintenance and assigned inventory to a technician, they can pull up service orders on their tablet, laptop, or smart phone and see what service tickets have been assigned to them.

When a technician is in the field, they effectively have a "standalone warehouse" in their truck. Many times, all they need to know is where to go. The dispatch office can generate the work orders and, when it's the appropriate time for dispatch, alert the tech on their handheld device that these are their upcoming service tickets.

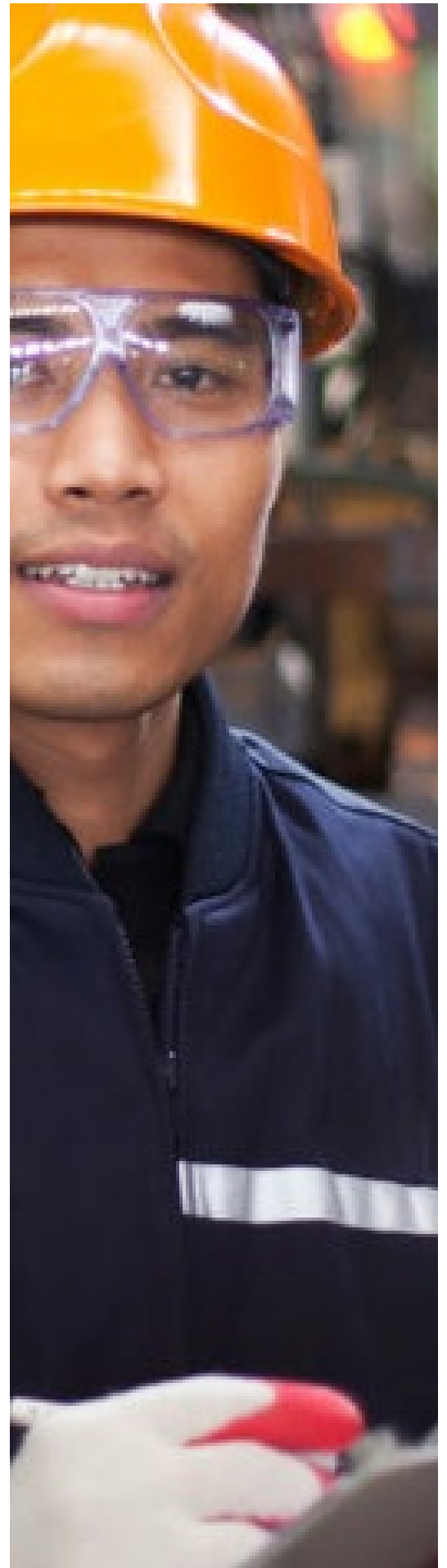
The service dispatch board in the service center allows the dispatcher to see each tech's assignments and schedule, along with several other metrics that allow the dispatcher to accurately select the right tech for the job.

The technician then has real time access to their schedule and can instantly see calls dispatched to them. With the click of a button, they can then see what the service order is for and another click shows them the location on a map with driving directions. Once at the customer site, they can record the work performed and parts used as well as get the customer to approve and sign on the tablet. A receipt is emailed to the customer and the tech is on to the next job.



When your techs are mobile-connected, your customer responsiveness increases dramatically, and in this instant-on world where customers expect immediate answers, this can make the difference between a renewal and a lost customer.

*"With the Click of a button they can see what the service order is for and another click shows them the location on a map with driving directions."*





# Maintenance

Maybe your current preventative maintenance system is nothing but a chalkboard with some scribbled notes on it. Or a spreadsheet or an Outlook calendar with lots of alerts, but no tracking or ability to audit or consolidate calls. With those "systems" it is more than likely that your client is calling you and asking when you are coming out next. A great system ensures that you can contact the client instead –

"You're scheduled for preventative maintenance next week. Is Thursday convenient?" – making your firm look professional.

SouthWare's preventative maintenance system also allows you to make more effective use of your vehicles on the road. Travel time has zero value – going out and buying parts, returning to the plant for an unforeseen need, etc. are all examples of non-revenue time. Because the system maintains the equipment information, you have constant access to a list of the parts you need when going out on a maintenance call.

Having a well-planned preventative maintenance visit looks professional to a client. When you have what you need, you're in and out, and it's apparent that you know what you're doing. This is much more professional than having a technician show up and say "Yeah, I'm here, but John went to pick up the filters. He'll be here in half an hour; I'll just wait for him."

The SouthWare system generates the service tickets and gives you a list of all upcoming jobs, so it's a



very transparent process, and, every time you sell a piece of equipment that requires a preventative maintenance service contract, you will benefit from a system that automatically creates maintenance tickets.

*"Travel time has zero value – going out and buying parts, returning to the plant for an unforeseen need, etc. are all examples of non-revenue time. "*



# The Technician

In most businesses, people are the wildcard. You can control many things – travel time, breaks, inventory needs – but knowing where your technician is, and what they know can be a challenge. A good preventative maintenance system helps you save money by monitoring your technicians' actions and time in the field.

The beauty of SouthWare's systems is that for non-scheduled maintenance calls, supervisors know the average repair time based on the repair type/problem code, so if a technician has been gone for an hour when the repair requires only 40 minutes, a supervisor gets an alert. The supervisor can then reach out to see if the technician needs help. Or, for example, if a technician has been to a location 20 times on 20 different service calls. That triggers the system and alerts a supervisor to a potential problem. The issue may be that the technician is doing the maintenance improperly and, as a result, is frustrating your customer. It may make sense to send a different technician or see if the customer needs a different product to meet their needs. It's a great customer service benefit.

Your service system should also coach the technician in ways that can benefit your sales team. Many technicians go on site and inspect equipment. If the technician notices wear, the benefit can be an up-sell. The system can also alert you to out-of-warranty situations that are quickly approaching, allowing your tech or sales team to approach the customer.



# Summary



You never get negative comments when your software works, and that's a great thing. SouthWare's preventative maintenance and service software solutions can help keep all your customer conversations positive. When your preventative maintenance programs are set correctly, both you and your customers benefit – your customer doesn't experience unplanned downtime and your business runs with fewer emergency calls, less wasted travel time, a steady cash flow, and ideal pricing on inventory.

Learn more about SouthWare and how our software can improve your business agility and profitability.



# Get in Touch

Find out more about what Chiptech can do to improve your business. Get in touch with us today and start having impact on customer satisfaction with preventative maintenance systems.

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GET IN TOUCH

