

Manufacturers Design Software with the HVAC Contractor in Mind

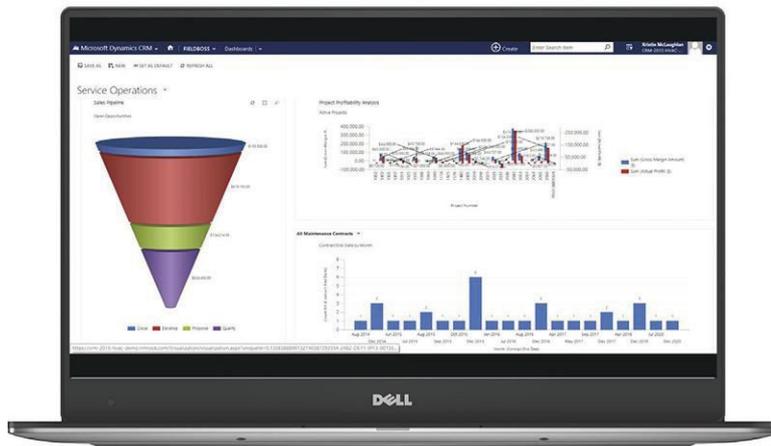
Software platforms are available to assist in operating every department of your business

BY SAMANTHA SINE
THE NEWS STAFF

Manufacturers have made great strides in developing software that makes contractors' lives easier. Currently, there are software platforms for everything from sales to efficiency monitoring — there's a little something for each of the different areas of a contractor's business.

The newest software is primarily used for field service management and design and customer service and sales.

Let's take a look at what this software has to offer.



LIKE A BOSS: Rimrock Corp. has created software called, FIELDBOSS® Field Service Software, an end-to-end solution built with Microsoft Dynamics 365. FIELDBOSS can tackle complicated contracting business challenges by providing a solution that connects field technicians, managers, and customers to your company's data.



STAY FOCUSED: "FIELDBOSS automates business processes to reduce back office turnaround, cut paperwork, and stop things from falling through the cracks, so customers can stay focused on growing their business," said Kristin McLaughlan, marketing manager, Rimrock Corp.

OUT IN THE FIELD

Technicians spend a majority of their time out in the field. That's why software has become so popular for HVAC contractors; it allows all aspects of a job to be run more efficiently.

Field service management software provides sales aids, customer service information, and monitoring and notification options.

According to Phuc Nguyen, director, product marketing, ServiceTitan, ServiceTitan is a one-stop shop, so to speak, for contractors to improve their business overall.

"ServiceTitan helps HVAC contractors run their entire business, get visibility into the metrics they care about, and manage their team's performance from anywhere, at any time," said Nguyen. "Many contractors have experienced increased sales, lower costs, and higher productivity using ServiceTitan. The average ServiceTitan customer increases sales by 24 percent in nine months, and top performances do much, much better. Customers can provide feedback through various channels, including the ServiceTitan app, or through the Success Manager. Maintenance updates are performed every two weeks, and new features are typically rolled out every three to four weeks."

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business challenges by providing a solution that connects field technicians, managers, and customers to your company's data.

"FIELDBOSS automates business processes to reduce back office turnaround, cut paperwork, and stop things from falling through the cracks, so customers can stay focused on growing their business," said Kristin McLaughlan, marketing manager, Rimrock Corp. "Schedulers have complete visibility of the calendar and scheduling board, so it take sec-

onds to figure out who is available, then schedule, dispatch, and alert a technician to a job. Improved first-time fix rates are possible, so technicians receive the right parts in their trucks for the right jobs, and their performance and productivity improve, directly benefiting the company's overall success.

"The software makes creating invoices faster and eliminates errors by automating the work order process to achieve shorter service-to-cash cycles, closing work orders in real time

while on-site, and the ability to generate invoices on technician's mobile devices," she continued. "Customers can also sign off electronically and approve work completed, parts used, and labor time spent. Mobile technology connects office staff, field staff, and equipment and data. Finally, it helps protect HVAC companies from unexpected events that can disrupt day-to-day operations, allowing you to manage risks, ensuring all company data and knowledge are collected and stored in one cohesive system."

STAY UPDATED

In addition, field software has been developed to monitor other aspects of an HVAC business, such as fleet and remote diagnostic management.

TomTom Telematics Co. created a fleet management solution, WEBFLEET, which gives HVAC contractors improved visibility into the work being performed by staff in the field. It also advises a contractor of the real-time location of service vehicles and drivers and the status of assigned jobs. In addition, it has the capability to provide drivers with feedback and coaching while they are on the road, alerting them to driving behavior, such as harsh braking or turning, excessive idling, or speed, which can improve a driver's safety, lower operating expenses, and reduce business liability.

Fleet management software, such as TomTom's WEBFLEET, is

designed for both those working in the office and the technicians on the go.

"It provides features for the business owner, dispatch, and service technician in the field," said Torsten Grunzig, director, North American sales, TomTom Telematics. "For the folks in the office, WEBFLEET provides visibility into the location of the techs so that the office can dispatch the right tech to the right job at the right time. The streamlined dispatch process is geared to deliver the best customer experience as it provides dispatch with the ability to accurately communicate to the customer a service tech's estimated time of arrival. It also provides the tech with navigation assistance to get to the job efficiently, on time, and with minimal hassle. It makes sure the tech also has all of the information they need to perform the work. This helps each technician to take on more jobs in a given time frame, which can potentially translate into more customers served and more revenue for the business."

Diagnostic issues can be timely and costly. That's why remote diagnostic software, like Whisker Labs' software platform, saves a contractor the hassle by providing trend information on critical parameters, such as duty cycle and run time, fault diagnostics, or root causes, so the technician can assure the right parts are on the truck and can better schedule jobs.

"Whisker Labs' Energy Sensor

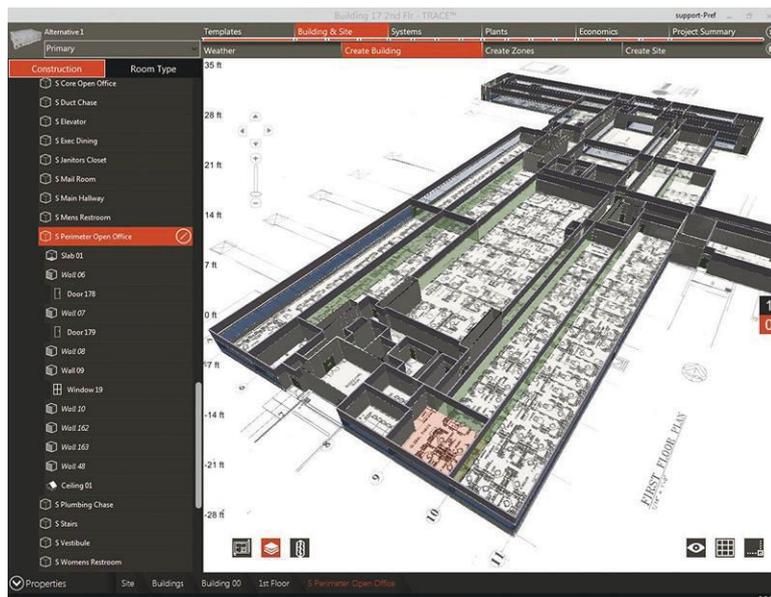
and software platform measures real-time power usage and converts it into diagnostic information,” said Amena Ali, chief revenue officer, Whisker Labs. “Our ASSURE service remotely monitors HVAC, enabling the contractor to identify potential malfunctions, so they can reach out to the homeowner with value-added services and improve their workforce time and asset management. In a competitive industry, ASSURE allows HVAC service providers to leverage innovation to differentiate themselves through higher levels of service and improved operations.”

In addition to diagnostics, it can be timely to figure out the efficiency of various motors and match the motor to the applicable module. Therefore, Regal Beloit America Inc. has created the Browning® Toolbox Technician™ mobile app motor calculator, which allows a technician to identify efficiency differences between different generations of integral horsepower electric motors.

“Facility managers, building owners, and those tasked with managing energy spends in commercial buildings are constantly looking for new ways to lower electrical consumption and stretch valuable budget dollars,” said Don Sullivan, director of marketing, HVAC and belt drives, Regal Beloit America Inc. “With this app, HVAC contractors can easily identify motor upgrade opportunities by being armed with the information they need to make recommendations to those responsible for facility or organizational energy usage.”

While out in the field, many technicians are required to create designs for customer’s to see how, and where, new HVAC equipment will fit into their home. To save time in the field on designs, new software is being developed that speeds up the process and allows a technician to see the design and whether or not it will work.

“All of our solutions, such as Right-Suite Universal and our mobile platform, are designed to increase the productivity of HVAC professionals through computer animation,” said Chris Edgren, vice president of sales and marketing, Wrightsoft Corp. “Rather than focusing on the end result, we are focused on how a contractor can get to that result. We invented our data entry tool, Right-Draw, to remove data entry and completely change how HVAC design is done. Our



INCREASING THE BOTTOM LINE: “Our software allows contractors to propose value-added alternatives to increase both the customer’s and the contractor’s bottom line,” said Matthew Biesterveld, customer direct service leader, Trane.

solutions feature our live Hot-link Technology, which updates instantly as you design. This unique feature saves time, cuts down on errors, and also allows contractors to easily play the ‘what-if’ game when designing.”

Similarly, TRACE 3D Plus software was designed to simplify the complex modeling process and save technicians valuable time. The software enhances simulation features that use standard or preloaded building template information and allows contractors to quickly and accurately make HVAC system recommendations.

“Our software allows contractors to propose value-added alternatives to increase both the customer’s and the contractor’s bottom line,” said Matthew Biesterveld, customer direct service leader, Trane. “Models from TRACE 3D Plus can validate decisions regarding building design alternatives and proper equipment sizing. Our software platform provides the ability to perform an economic analysis and comparison of any of the alternatives created using the building field provided information.”

CUSTOMER SERVICE LEADS TO SALES

A great customer service experience can be the deciding factor as to whether or not a customer chooses you as their contractor.

“By 2020, customer service will overtake price as they key differentiator for businesses, and the phone is a critical customer touch point,” according to Walker Information Inc.

Furthermore, 80 percent of first-time callers are likely to become repeat customers if they have a good experience on the phone, according to Invoca.com.

Ruby Receptionists is a remote receptionist service that helps make contractors’ lives easier by providing the phone coverage they need, so potential customers don’t fall through the cracks. The custom software, paired with the company’s highly-trained receptionists, means every caller is greeted by a friendly professional prepared to answer with the contractor’s greeting and specific instructions, and, 99 percent of the time, those calls are answered within four rings.

According to Katharine Nester, chief product and technology officer, Ruby Receptionists, the software allows contractors to focus on the job, not the phones.

“Little interruptions can add up to a lot of lost billable hours,” said Nester. “Our services and software allow contractors to focus on the job at hand and remain productive, which, in turn, improves their bottom line. They aren’t wasting precious time answering calls from solicitors, or losing a piece of new business because the call went to voicemail.”

“If 74 percent of callers are likely to choose another vendor after just one bad experience, Ruby provides the peace of mind to these contractors,” she continued.

With a few taps of the app, contractors can easily change the way Ruby handles their calls. The app syncs with their calendar, too, so they can choose times during the day to not be disturbed or send alerts to Ruby concerning specific customers. Contractors can even return calls showing their business phone number on the caller ID from the mobile app, helping to separate the professional from the personal.



CustomerLobby

ZERO GUESSWORK: Customer Lobby is designed to take the guesswork out of marketing by analyzing an HVAC contractor’s data — it predicts which past customers need service and sends them personalized postcards and emails. Since the process is automated, it saves the contractor time but, more importantly, saves money since they are not blindly marketing without insights from their own customer data.

“We operate as an extension of their business and truly sound like a receptionist in their office,” continued Nester.

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“Endless marketing options, like pay-per-click, Facebook, Yellow Pages, direct mail, etc., have become more expensive over the last five years on a cost-per-new customer basis,” said Matt Aiello, director of marketing, Customer Lobby. “Most HVAC contractors do not realize that two-thirds of their revenue typically comes from past customers, so the key to profitable growth is retaining more of the customers you have.”

“Our development team is continually iterating on and training our software to use our customers’ data to make the best and most timely marketing decisions to drive transactions back to our customers,” he continued.

Once customer service is mastered, the art of the sale is next. New software works to make the sales process easier for both the technician and the customer.

Enterprise Selling Solutions makes the sales process faster and easier, crafting a professional presentation for the technician to sell to the customer.

“The very first feature of our program that increases the bottom line is how little time it takes to create a professionally merchandised offering for the products the dealer offers,” said Dewayne Gibson, CEO and co-founder, Enterprise Selling Solutions. “We know that the average dealer has anywhere from 30 to

90 minutes to perform a load calculation on the home, build rapport with the customer, and then attempt to build a professional presentation, so they can look better than the next person coming through the door to give a price for the same work.

“Our program allows the tech to spend minutes instead of hours to put together a four-option proposal for the consumer to choose from,” he continued. “The time saved doesn’t have to mean a shorter call. What it does mean is they have the opportunity to spend more time bonding with the customer. Since the program packages four options together, we find that over 70 percent of the time, the customer chooses either the best or better options.”

Furthermore, building a strong customer relationship can be the difference between making or not making a sale. The Foobot, by Airboxlab US, has an IAQ dashboard that helps HVAC contractors grow their business in two different ways.

“The first one is that by using higher technology to monitor air data and Foobot’s charts, the technicians are seen like experts by their clients and can sell IAQ jobs on top of other regular jobs,” said Adrien LaFond, chief marketing officer, Airboxlab. “And once Foobot, is present in a customer’s home, it’s like a live link between the contractor and its customers. Our offer for contractors adds a subtle touch point between you and your customers. You can read how air quality is in all of your clients’ homes remotely from your office. The offer consists of a hardware monitoring product; the Foobot, which you leave in clients’ homes; and a software that only you can access from anywhere. This helps you call back your past clients precisely when they need you, and build long-term relationships with customers.”

APPS

Continued from Page 1

work order information, customer data, and more from a tablet or smartphone. Rich Morgan, CEO, Magic Touch Mechanical Inc., Mesa, Arizona, uses the mobile application as part of the company's content management system (CMS) software.

"The ESC Mobile app allows our technicians to review all of the clients' service and installation history, previous repairs, and view if they are a maintenance agreement holder and, if so, what level plan they have," said Morgan. "Having the customer and equipment history helps tell the story of what technicians have found or noted on previous visits and allows us to deliver a better customer service experience."

"It also allows technicians to capture a customer signature, payment, etc.," he added.

Bryan Beitler, vice president and chief engineer, Source Refrigeration & HVAC, Anaheim, California, said his company utilizes two apps for sales purposes.

"Our sales team utilizes Salesforce, and our dispatch call center uses Wennsoft," said Beitler.

Salesforce allows the sales person or technician to log, manage, and analyze all customer activity in one place. Also, the user can monitor everything from sales leads to support tickets and channel marketing to website analytics.

Wennsoft, now called KEY-2ACT, is field service management software and an app that allows users to access field service information, such as work orders, dispatch schedules, service estimates, etc., and it can also help with asset and fleet management.

The team at Welsch Heating & Cooling Co., St. Louis, uses Quick Sale, an app they modified in-house to use for their sales needs.

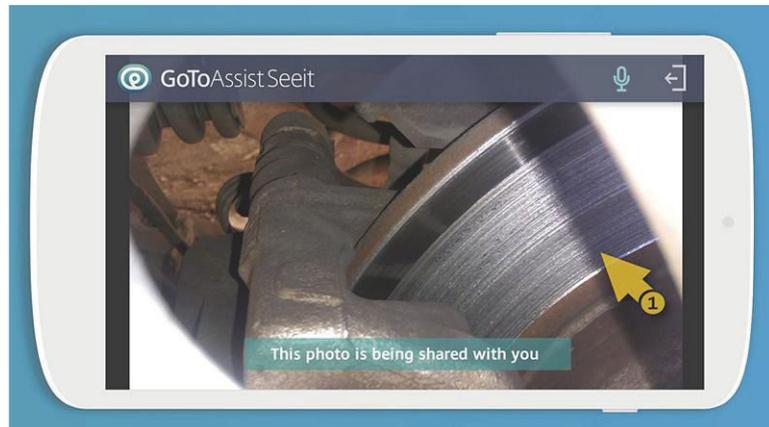
"The app allows us to prepare an invoice or bid and to review inventory right at the customer's table," said Butch Welsch, owner, Welsch Heating & Cooling. "Also, it allows us to send emails directly to the customer at the time of the appointment. Lastly, it also stores every bid or proposal generated by the salesman."

Richard Glowacki II, director of energy management services, HVACR division, City Facilities Management LLC, Burlington, Massachusetts, increases customer communication through an app called Survey Tool.

"It's a configurable app which allows customers to use City's

Demo Company						
Sales This Year						
Number, P.O., or Customer's Name						
Tuesday, January 10, 2017						
Date	Number	PO / Customer Name	Profit	Margin %	Balance	Total
1/10/17	12	John Appleseed	1,300.00	56.55 %	2,528.90	2,528.90
Tuesday, February 7, 2017						
2/7/17	13	David Taylor 555-610-6679	18.00	85.71 %	22.20	22.20
2/7/17	14	Hank M. Zakroff Financial Services Inc.	1,000.00	50.02 %		2,198.90
Wednesday, March 15, 2017						
3/15/17	15	Anna Haro	386.00	99.23 %	290.40	390.40
Monday, April 10, 2017						
4/10/17	16	Kate Bell Creative Consulting	563.00	100.00 %	592.80	592.80
Total Cost			\$2,004.00	Subtotal		\$5,271.00
Profit			\$3,267.00	Shipping		\$0.00
Margin			61.98 %	Tax		\$462.20
			Total		\$5,733.20	
			Payments		\$2,298.90	
			Balances		\$3,434.30	

SALE AWAY: "The [Quick Sale] app allows us to prepare an invoice or bid and to review inventory right at the customer's table," said Butch Welsch, president, Welsch Heating & Cooling Co., St. Louis. "Also, it allows us to send emails directly to the customer at the time of the appointment."



SEEING IS BELIEVING: "The GoTo Seelt app allows technicians, installation crews, and sales people to send live streaming video of a job site, equipment, etc. to our in-house tech support, some manufacturer tech support representatives, and other technicians," said Rich Morgan, CEO, Magic Touch Mechanical Inc., Mesa, Arizona.

field workforce to collect different types of information about their sites or for City to collect information relevant to improving the services it provides to its customers," he said. "Using this app, our real-time reporting commitments to our customers are met."

TRACKING AND TECHNICAL SHORTCUTS

Let's face it — tracking is one of the biggest hurdles every HVACR business faces, especially in companies with a large staff and fleet. Therefore, contractors are looking to save time when searching for or ordering parts. There are apps that make the process easier, so your technicians can get the job done faster.

While out in the field, if a technician needs to stop by the hardware store to purchase supplies, he or she can track their

purchases in real-time using the American Express app. That way, a contractor can see exactly what the technician bought and when.

"The American Express app allows crews to take pictures of receipts and match to purchases in real time," said Elizabeth Gerber, general manager, Professional HVACR Services Inc., Avon Lake, Ohio.

The techs also use the WEX Telematics app to track their fleet.

"Telematics allows us to internally set up notifications based on mileage and vehicle history to keep up to date on our maintenance," said Gerber.

Using My Jobs, an app City Facilities Management developed through its in-house service management system called Mercury, a technician can manage all work assigned to them.

"My Jobs is an app that facilitates the scheduling, updat-



FIND YOUR FLEET: "We use WEX to track our company vehicles," said Elizabeth Gerber, general manager, professional HVACR Services Inc., Avon Lake, Ohio.



ONE-STOP SHOP: Salesforce allows the salesperson or technician to log, manage, and analyze all customer activity in one place. Also, the user can monitor everything from sales leads to support tickets and channel marketing to website analytics.

ing, parts ordering, and general management of all work assigned to a technician," said Glowacki. "Aside from having all of the information about a fault at hand, the technician can use the My Jobs app to order parts, update statuses, make requests for additional assistance, or manage a quotation process where work exceeds pre-agreed delegated authority limits. This reduces the time a technician would normally spend speaking to different departments, thereby increasing their overall efficiency and repair times for our customers."

Troubleshooting and tech support have never been easier now that there are apps to facilitate communication.

"The GoTo Seelt app allows technicians, installation crews, and sales people to send live streaming video of a job site, equipment, etc. to our in-house tech support, some manufacturer tech support representatives, and other technicians," said Morgan.

"The support representative can annotate with text, arrow, circles, etc., which appears on the technician's screen in real time. It is the equivalent of having a technical support representative looking over a technician's shoulder or possibly

allows a salesman to better communicate job site conditions that pictures may not show."

"The Super Cool HVAC app has lots of good stuff for troubleshooting," said Jacob Lindsey, service manager, Hunter Heat & Air LLC, Ardmore, Oklahoma.

The Super Cool HVAC app provides solutions to the diagnostic issues. It provides the user with an interactive experience, possible solutions, on-screen instructions, and guides the technician through each step of repair work.

These are just a few of the apps available to contractors today.

From inventory management to customer history to troubleshooting — pretty much whatever the situation — there is an app for that.

"By 2020, mobile apps are forecast to generate around 189 billion U.S. dollars in revenues via app stores and in-app advertising," according to statista.com, the statistics portal.

So, if you haven't already joined the future of HVACR contracting, consider visiting the App Store to download and try some of the new technology designed to transform the way contractors do business today. **N**