



SERVICEBENCH®

INTEGRATED SERVICE MANAGEMENT



HVACR SERVICE ADMINISTRATION

OPTIMIZING SERVICE PRODUCTIVITY AND PROFITABILITY WHILE
DELIGHTING CUSTOMERS

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The convergence of cloud computing, business management systems, and HVACR administration benefits everyone involved in a service event. As in many industries, cloud computing eliminates the cost of purchasing and maintaining individual computer systems; additionally, hosted services like business management software (BMS) are easier to access on the same interface. Increased performance efficiency — through the alignment of manufacturers, installation and contractors, distributors, and retailers — drives costs lower when it comes to HVACR administration.

Of course, performance efficiencies are only one advantage of applying business management systems to HVACR services: web-enabled cloud services also open the door to increased customer engagement. Too often, homeowners wait for contractors to acknowledge service requests before performing installation, routine maintenance or repair; however, cloud-enabled BMS portals allow consumers to view contractor assignments, parts orders, schedules, and other transactions associated with a service event. Additionally, automatic notifications about the status of an installation or repair improve customer engagement.





Many within the HVACR industry are beginning to automate their sales and service processes, allowing them to cut their customer acquisition costs to keep pricing competitive.

INDUSTRY TRENDS CALL FOR MORE ROBUST SYSTEMS

The HVACR systems market was an \$81.1 billion market as of 2015. The market is expected to grow by 5.5 percent each year through 2020, leading to opportunity worth of \$130.7 billion by that time, according to the [News](#).

Despite projected industry growth, we could see a talent shortage of over 138,000 employees by 2022! Contractors won't just be competing against each other to fill positions, but to fill new jobs created by the market's increasing demand. Therefore, contractors need to take part in growing technologies to be competitive in the industry.

The HVACR industry is getting smarter. Many within the HVACR industry are beginning to automate their sales and service processes, allowing them to cut their customer acquisition costs to keep pricing competitive.

Smarter technologies, such as the use of smartphone apps, allow building managers to control lighting, ventilation, and other processes with one control point. At the administration level, HVACR contractors will also be using software, widgets, and other online tools and strategies to help connect with local customers who are researching their system.

Mobile solutions will continue to drive innovation within the HVACR industry as more potential customers look to meet their needs through the use of tablets, smartphones, or tablet PCs. As HVACR systems continue to develop innovative, but complex solutions for buildings, consumers are expected to continue turning toward mobile technologies to set up preventative maintenance and service programs.

Together, these trends indicate a need for essential systems that offer value for every stakeholder in the service





SERVICE ADMINISTRATORS
& MANUFACTURERS



DISTRIBUTORS



CONTRACTORS



event lifecycle. Organizations that have migrated to robust, cloud-based service

management systems or business management systems have achieved better performance. With hosted and managed services, increased security, and additional support available through Software-as-a-Service (SaaS), cloud access allows greater collaboration between HVACR administration providers, distributors, and contractors. As a result, service revenues have increased by an average of ten percent and service workforce productivity has increased by 8.9 percent. Homeowners also benefit from better resources offered on a greater scale as well as the capability to see the progression of service actions in real-time after submitting a claim.



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RELIABLE SYSTEMS, BETTER WARRANTY MANAGEMENT

Better HVACR management begins with high-quality information and reliable data centers. Any computer or system failure can lead to unnecessary delays in moving parts from inventory to task or responding to customer queries. To prevent issues like these, business management software applications operating in the cloud can automatically update data with minimal response time. Robust cloud computing systems relay information on multiple servers with the provider network and use stringent data security processes to protect consumer privacy and confidentiality while guarding against data loss or intrusion. Using approaches like these, providers can ensure nearly 100 percent uptime in addition to compliance with SAS-70/SSAE 16 third-party organization audit standards for data centers, the

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Service Organization Controls reporting framework, and the technical requirements necessary for maximum compliance with PCI physical security standards.

EMPHASIZE CUSTOMER ENGAGEMENT

Not only are data centers more reliable within this framework, but they also increase customer engagement through easier access to information. Hosted applications and web browsers provide instant access to contractors and dealers on tablets, laptops, and smartphones, reducing or eliminating delays for homeowners. For example, administrators and contractors can review contract terms and submit documents from the office or on site using mobile devices; vendor and contractor teams can review service histories, create new orders, synchronize workflows to facilitate shipping, and oversee billing processes. Contractors also have the advantage of building better customer relationships using mobile field service software applications with the same interface to provide on-time, customized information about a specific job. With this information in hand, contractors can service customers better.

HVACR administration begins with the job management processes offered by business management software. Onboarding and profile setup processes provide the information needed to introduce customers to contractors and establish service histories. Business management software also offers the capability to search for customers by name, company, or address and to store

preferences for contact information, language, and payment. Easier access to this information positively impacts customer relations.

Cloud-based BMS solutions can also host configurable, specialized web portals for contractors that increase customer



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convenience. Homeowners can view contractor calendars, to see their availability, and schedule, reschedule, or cancel onsite service visits easier than before. In turn, the management software sends customers automatic reminders about appointments and updates about contractor status by email, text, or phone.

To ensure the highest quality of service, BMS applications also support third-party workforce management by tracking service start and end times. Using this information, the system can provide the location of the contractor to the consumer portal and job board. If necessary, a distributor can view contractor skill levels, locations, and schedules and reassign jobs based on the best match for the task — a much more efficient form of job routing. Daily contractor dispatch reports can also show service patterns and locations, enabling effective route planning and reduced costs. Workforce management through BMS applications has resulted in a 4.6 percent decrease in repair time and a 7.0 percent increase in first call fix/job completions.

ENHANCED PRODUCTIVITY EQUALS ADDED VALUE

The ability to connect to cloud-based BMS information anytime from any location increases productivity as well. Given the decentralized nature and broad reach of home warranties, claim administration may occur in different languages, cover products manufactured in almost any country by leading OEMs, involve parts

distributors working from any location, and utilize large networks of dealers and contractors.

Although it may seem daunting, cloud-enabled business management software applications offer real-time access and the capability to streamline the administration of warranty

claims. Office staff can coordinate client support and maintain contact with dealers and contractors while searching for and locating critical information found in easy-to-navigate databases.

The processing power of these applications is evident in the





Even though the number of dispatch and claims transactions seems overwhelming, the average transaction occurs in less than one second.

efficient, timely handling of millions of transactions annually and the disbursement of billions of claims dollars each year. These transactions may include dispatch transactions and claims transactions — interactions with potentially thousands of users spanning the entire process of a service event. Even though the number of dispatch and claims transactions seems overwhelming, the average transaction occurs in less than one second.

Business management software must facilitate claims forwarding from Individual Service Plans (ISP) to existing OEMs and debt carriers; BMS functionality must also include invoice, credit and debit card and check payment processing. Invoice generation involves exporting service job invoices, managing invoice and claim tracking numbers, and attaching due dates and customer information to invoices. Monthly reports automatically compiled by the BMS allow dealers to view sales transaction information instantly.

ENHANCED SUPPLY CHAIN EFFICIENCY

HVACR management may involve estimates, repairs, and installations. Because of the wide range of tasks involved in warranty management, a BMS must be capable of handling not only service orders but also different facets of supply chain management. Job management may cover single or multiple job resource booking and dispatching, in-warranty claims, out-of-warranty claims, and extended warranty agreements.



Efficient supply chain management requires optimal service ordering and parts ordering processes, which can be achieved through a combination of BMS and cloud computer functionalities (e.g., the ability to share and monitor resources, as discussed above). As service administrators add parts to a service job — either through inventory look up or manual entry — multi-location inventory management ties the service job to major parts distributors. Inventory management systems automatically request the parts order, capture SKU numbers, and track the parts from inventory. In addition, inventory management considers inventory location,



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stock levels, and thresholds that trigger notifications to replenish part supplies. Part availability information, service job estimates, and invoice files are accessible by web browser or application on desktops, laptops, and mobile devices.

Accessible financial and supply chain tools that research, order, and process returns over multiple locations contribute to increased performance efficiency. Applications within the BMS automate the Return Merchandise Authorization (RMA) process while easing reconciliation. Analytics based on historical data provide forecasts about parts usage and stock levels. Dealers also benefit from the assignment of trucks to specific contractor and the display of parts via the system. Finally, consumers benefit from the ability to view these parts transactions and receive ETAs (estimated times of arrival) through the service administrator portal.



GET THE GOLD STANDARD

ServiceBench offers a cloud-based platform that manages job dispatches and claims from multiple sources. ServiceBench was developed through the direction of industry professionals, so its BMS applications scale to all business types and sizes. **Asurion** has considerable experience applying ServiceBench to leading industries, OEMs, retailers, and contractors; collaboration, ease-of-use, and enhanced functionality empower all parties to successfully navigate the complexities of HVACR administration.

Additionally, performance metrics embedded within ServiceBench drive productivity while financial management tools support thousands of users and more than 12 million dispatches and associated claims annually. Without a doubt, ServiceBench set the foundation for customer satisfaction and long-lasting success in HVACR administration. With ServiceBench, the cost of service has decreased by five percent while the number of service contract renewals has increased by 7.1 percent. The services and partnership offered through ServiceBench set the foundation for customer satisfaction, creative marketing opportunities, and long-lasting success.