



# Empowering Field Technicians through Technical and

# Customer Service Training



*by William K. Pollock*



**T**here is more to customer service—and satisfaction—than merely fixing the customer’s equipment. Field technicians also must be empowered to fix the customer. However, without the proper training, technicians may fall back on what they know best: equipment repair.

There are many training resources available that focus on the “how to’s” of equipment repair, and many services organizations have benefited from the use of these traditional training resources. However, if your field technicians are not receiving training on how to provide customer service along with technical support, then your organization may be ill prepared to win the enduring confidence and loyalty of your customers.

Providing customer support requires more than just technical training. Every day, your field technicians deal with customers that vary by type, size, installed base, equipment usage, personality, and everything else that differentiates one customer from another. However, one thing remains constant: their systems and equipment are important, if not vital, to their day-to-day business operations, and they depend on your field technicians for the continuous availability, operation, and usage of their systems and equipment. Therefore, your field technicians require much more than just technical training. They also require a full measure of customer service training.

Training is an essential component of successful customer relationship management (CRM), and communications is a critical element of training. Customer relationship management is only worth the effort that an organization puts into it—nothing more, nothing less. But some organizations still do not recognize the importance of including customer service training in their CRM initiatives—or even if they do, they may not know how to make it work at the individual technician, individual customer level.

Mark Challenger, founder and president of the e-learning software company MindBuilder Group, believes that teaching technicians to understand customers and to effectively communicate and build relationships with their customers should be a critical component of their overall training. His company teaches techni-



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# empowering field techs through technical and customer service training

icians to utilize a “Listen, Observe, Think, Speak” (or LOTS) approach. (See *Figure 1*.)

According to Challenger, “Every time a technician walks through a customer’s door, he should be thinking *LOTS*, because its guidelines will foster loyalty and understanding. It works well in virtually every service environment, regardless of the type of equipment being supported.”

## **Listen**

A good technician may get all of the information he needs directly from the machine, but by listening to the customer effectively, he can convince the customer that they are working together not only to fix the equipment, but to meet a production deadline, avoid the need for an overtime shift, or support the executive office. Listening is always the right place to start,

but it is only the point of entry to the customer relationship. There are other important things that must follow.

## **Observe**

Observing begins at the same time as listening. Words are not only words. The manner in which they are conveyed communicates a more complete story. Therefore, the field technician must observe how the customer acts, the tone in which the customer speaks, and the overall situation with the equipment itself. Through careful observation, the technician can determine urgency, complacency, panic, or whatever emotional content drives the customer’s expectations and desires—a vital component to responding to the situation at hand effectively and to building lasting customer respect and loyalty.

## **Think**

Throughout our lives, we have been told to think before we speak. This is never more important than when a field technician is dealing with a customer, especially a customer who is faced with an expensive and important piece of equipment that isn’t working. The first words spoken by a technician upon arriving at the site will set the tone for the entire service call, so it is vitally important to choose them carefully. Choosing the right words can be accomplished only if the technician first has listened to and observed the customer and environment.

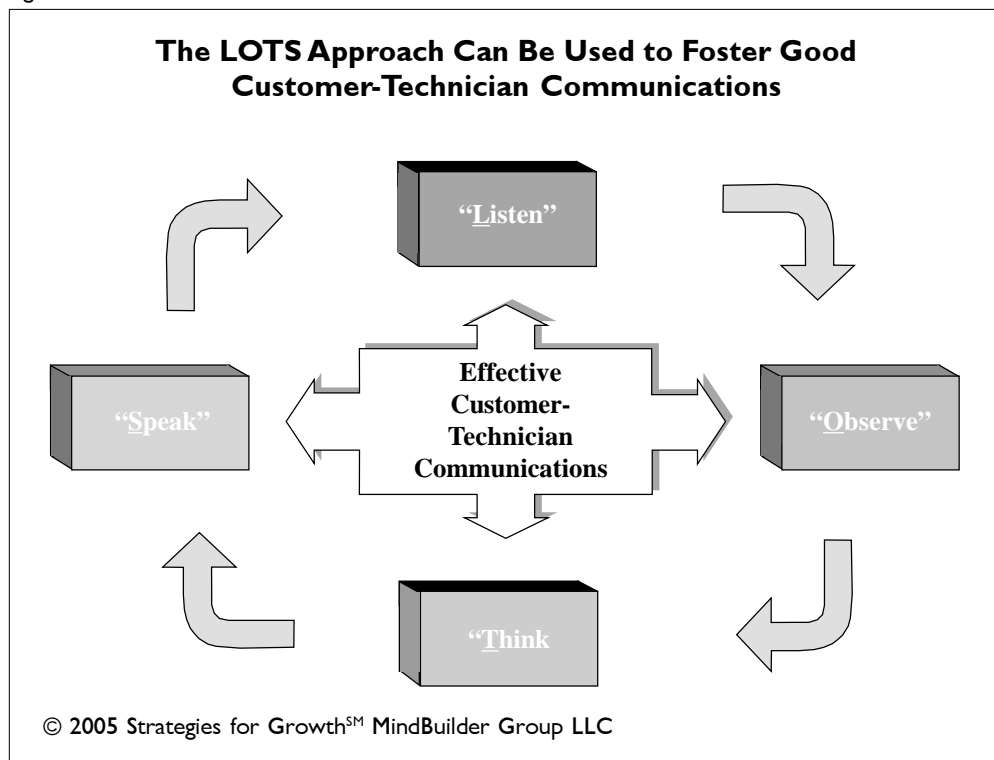
## **Speak**

If the previous three areas have been handled properly, this next step should be the easiest. Technicians should keep in mind that they are the experts. They are the ones on whom the customer is depending to assess the situation, re-

pair the equipment, and get them back to some semblance of normalcy. Still, the technician’s words are what the customer will remember long after the technician has left the site, which is why it is so important for them to wait to do the thinking until after they have listened and observed. Your technicians should understand that nearly everything they say will be frozen in the customer’s mind.

The basic rudiments of customer service are not always obvious, especially in delicate situations where the customer is becoming increasingly unhappy, which is why field technicians require customer service training.

*Figure 1*



They may know how to fix equipment, but can they make an unhappy customer happy again? Do they know how to transform a “bad” service call into a “good” one? These customer skills can be learned only through formal instruction not included in any technical training manuals.

**If You Train Them, They Will Sell (i.e., Cross-Sell and Upsell Services)**

Many people believe that selling physical products such as computers, printers, or segment-specific equipment is easy. Companies can include photographs and hardware specs for their products in brochures and catalogs and on their Web sites, and demos often can be conducted right at the customer’s site.

But in reality, selling products is actually quite difficult, and for technicians who never had to sell anything in the past, selling your company’s products is certainly no slam dunk. And yet, technicians have an ongoing relationship with the customer, so if they can be taught to “sell” service agreements, equipment upgrades, and professional services on already installed equipment, they can become a vital source of new revenue (see *Figure 2*).

For example, some customers may understand that warranty service on a specific piece of equipment lasts for only one year, but they may not recognize that post-warranty support is billed on a time-and-materials basis, which could end up being quite expensive. Others may

have new staff members who require “fresh” training for an already installed business system. These are both classic cases where existing accounts already may be clamoring for enhanced coverage, extended service agreements, or various other types of professional services that your company may offer (e.g., user training, train-the-trainers assistance, custom documentation).

If your field technicians are trained properly in cross-selling and upselling, they will know which accounts are ripe for being approached with extended maintenance agreements, professional services, and so on. And if your technicians have been keeping up to date with your company’s portfolio of offerings, they also will be prepared to speak directly with those accounts about what will make for a more effective service

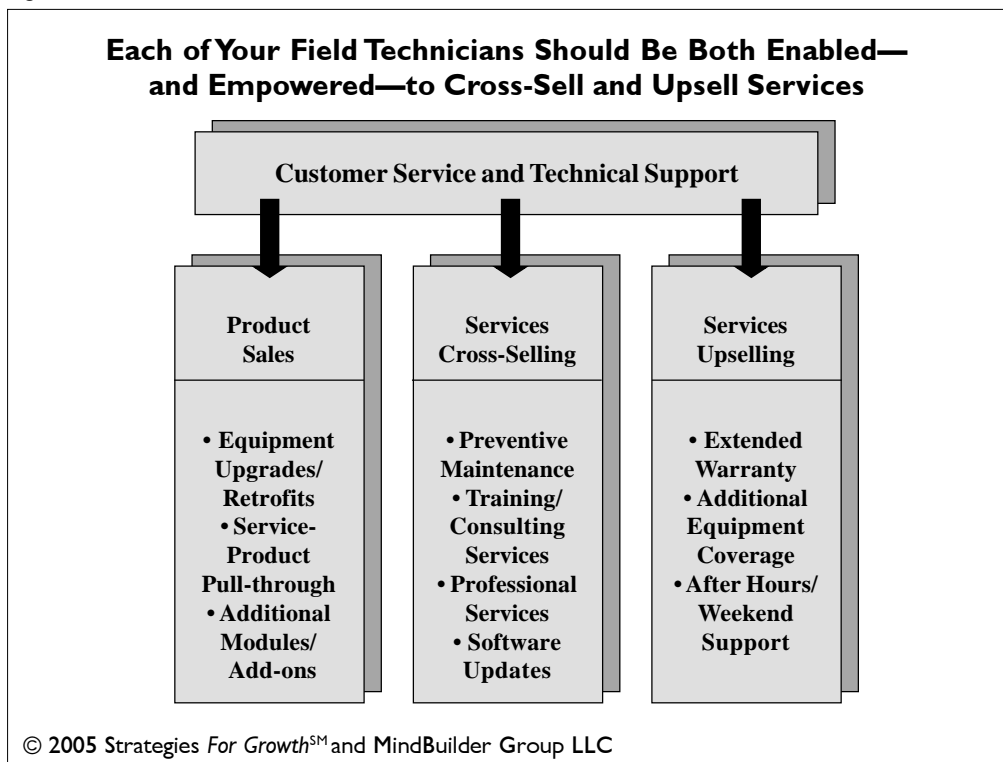


package over time. What your field technicians must contribute to the company’s overall services sales effort is a good understanding of what their customers need and the ability to match these needs with the appropriate types of products and services offered by your company. When trained properly, your technicians will be able to tap this untapped source of revenue.

**Create a Checklist**

Selecting the most effective training tools and resources requires a checklist. When looking for the most effective type of customer service training program to supplement the technical

Figure 2



## empowering field techs through technical and customer service training

training that your field technicians have received already, e-learning (or distance learning) can be one excellent option.

“Today, e-learning comes in a wide variety of shapes, sizes, and flavors—so depending on what you need, there are many alternatives for you to consider,” says Challenger. “The first question that you will need to ask yourself is whether or not you can use one of the plentiful off-the-shelf courses that are readily available on the market. If you can, that’s great, because it likely will save you time, money, and a lot of headache. However, before you jump headlong into what is a supposed time- or cost-saving alternative, first do some homework as to what the program offers vs. what your technicians really need to learn.”

Consider the following guidelines for selecting the most effective—and cost-effective—e-learning solutions (see *Figure 3*):

*Figure 3*

### 10 Key Things to Look for When Selecting a Customer Service Training Program in Support of Your Organization’s Field Technicians

- Narrow your choices to e-learning courses that allow you to manage groups.
- Only choose learning systems that deliver content that inspires technicians.
- Limit your use of off-the-shelf programs to technology-oriented training.
- Take the online demo before purchasing the program; evaluate alternatives.
- Beware of e-learning programs that require software downloads.
- Assess the ease of navigating the program; make sure it is self-evident.
- Carefully evaluate the course graphics for clarity and relevance.
- Look for courses that incorporate an instructor’s voiceover.
- Make sure you have the ability to track the student’s performance.
- Look not only for content, but also for applicability to your services segment.

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1. Narrow your choices to e-learning courses that are based on a sound pedagogical design that incorporates multiple tools in order to ensure that students are involved directly in the learning process. Limit choices to educational programs and software that can transfer knowledge effectively and will allow administrators to assess and manage groups, individuals, and programs.

2. Whether your organization covers the globe, the nation, the city, or only the equipment installed in your own facility, you should only be looking at learning systems that deliver content in a manner that will inspire your technicians, providing them with the tools they need to achieve their goals in the most effective—and cost-effective—way possible.

3. If you are simply looking for technology-oriented training (e.g., supporting computer networks, or software training for programs), then off-the-

shelf programs may be your best alternative. There are hundreds of programs on the market, and there is no need to pay a premium price for a commodity service, nor is there a need to reinvent the wheel.

4. While some of the available e-learning programs are very good, the quality can be widely divergent from one vendor to another, so it is important that you thoroughly investigate the alternatives. For example, take an online demo course to provide you with some “real-time” comparative information.

5. Beware of e-learning programs that require software downloads. The rule of thumb is that if you are required to download something, then your field technicians will be required to download it too. Assess the varying types of Internet connections that your technicians will be using to access the programs, and then make your decision accordingly.

6. Assess whether the selected program is easy to navigate. Navigation should be both easy and self-evident; if your technicians require a learning curve on how to use the course, you may lose some of them before they even get started.

7. Carefully evaluate course graphics, as graphic design historically has been a major problem for many off-the-shelf courses. What your technicians see on-screen is critically important, because they will not have a classroom instructor to revert their attention if their interest strays. Graphics should add instructive value to the course, and your eyes should

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not gloss over when you look at them.

8. Look for courses that include an instructor's voiceover, as both the audio quality and the instructor's presentation of the course material will be of extreme importance to student comprehension. Courses without an audio component tend to be little more than poor imitations of books, and they are usually more expensive. If the online course you are evaluating does not have an audio component, you should look for an alternative that does.

9. Make sure you have the ability to track the technician's course performance, as not all off-the-shelf courseware allows managers to do so. Many of the programs on the market today were not designed with the capability of conducting student assessments. Not everyone likes taking exams, but a course that does not offer a student assessment is a waste of time both for the student and for the organization.

10. When evaluating learning platforms, look not only for content, but also for applicability to the specific segments of the marketplace that you support. Check to see if there is a way for students to take notes or to contact instructors from the courseware vendor. Evaluate the ease with which you can build a technician discussion group or include additional extra-curricular resources.

Whether you are developing courses in-house or using the services of an outside e-learning provider, it is important that the courses are based on sound pedagogical principles and that they work specifically in your segment of the marketplace. The bottom line for evaluating the value of any course is knowledge transfer. If your technicians do not

acquire and retain usable, real-world knowledge from these courses, then you have wasted their time and your money.

### **Technical Training and Customer Service Training Go Hand in Hand**

Customer service is not a game, nor is the technical training for your field technicians. Both are serious matters, and they go hand in hand. Ultimately, you cannot be a successful services organization if your field technicians do not have a fair mastery in both areas. Therefore, whatever curriculum you choose, it must address all facets of customer service and support that your technicians will need to know in order to establish and maintain real relationships with their customers.

Your field technicians already have extensive training on how to fix various types of systems and equipment, and they probably take remedial courses from time to time, or whenever the company introduces a new product line. Customer service is no different. They will need to take follow-up courses in this area. That is the nature of the business, and they are directly immersed in it day after day, right at the front lines.

By providing your customers with a full measure of technical support and customer service, you can improve their overall levels of satisfaction and loyalty. It is a win-win situation for everybody involved. The best-in-class services organizations already have accomplished this, and with the proper technical support and customer service training, your field technicians can learn as well.

There really is nothing difficult about building customer loyalty—if

you receive the proper training. In fact, if you do it right, it can be argued that training your technicians to fix the customer is really much easier than training them to fix the equipment. ▼



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