Craft an Excellent Customer Journey: Using Portals vs Going Without

WITH PORTALS

① BOOKING

- Cut admin time by taking requests through your website
- Free up your telephone lines
- Win more work with a 24hr lead capture system
- Log customer info directly into your management software

② ESTIMATES

- Speed up communication and reduce the need to call
- Customers can pay deposits on a secure webpage anywhere, anytime
- Customers can leave comments to give you additional feedback

③ TRACKING
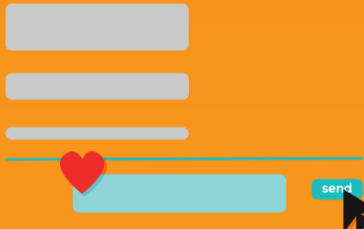
- Customers can see exactly who is arriving and can track the technician's journey
- Let customers know the ETA with an Uber-style display
- Reduce no-access jobs by increasing transparency

④ INVOICING

- Invoice customers via email
- Integrate with your accounting package to optimize cash flow
- Pay anywhere, anytime, via debit or credit card
- Benefit from secure and swift payments

⑤ AFTER-SALES

- Automatically send feedback requests when a job is completed
- Enable your business to recognize problems quickly and fix them sooner
- Gain insight into employee performance
- Produce reports detailing overall customer satisfaction

WITHOUT PORTALS

① BOOKING

- Spend more time on administration than actually winning business
- Let your team struggle with inefficient communication
- Limit yourself to dealing with customer inquiries during office hours only
- Lose out on potential jobs

② ESTIMATES

- Prepare estimates manually and then mail them
- Wait on customers to contact you to pay their deposit
- Delays cause confusion, frustration, and can lead to debt

③ TRACKING

- Customers can wait for ages, ruining any plans for their day
- Waste valuable time with an increased likelihood of no-access jobs
- Trust issues can develop and increase customer dissatisfaction
- Jobs need to be re-booked, which wastes time, money, and admin effort

④ INVOICING

- Spend valuable time sending printed or emailed invoices
- Chase customers for payments
- Limit yourself to check or card payments taken over the phone

⑤ AFTER-SALES

- Remain in the dark about technician performance and customer satisfaction
- Increase the odds of negative reviews surfacing online
- Miss out on relevant and timely feedback, leading problems to persist

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Do you want more information about customer portals?
CHECK OUT COMMUSOFT!

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