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# 5 Key Steps to Prepping for the Heating Season

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# Introduction

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## 5 Key Steps to Prepping for the Heating Season

*A free guide—plus checklists—for field service businesses from Commusoft.*

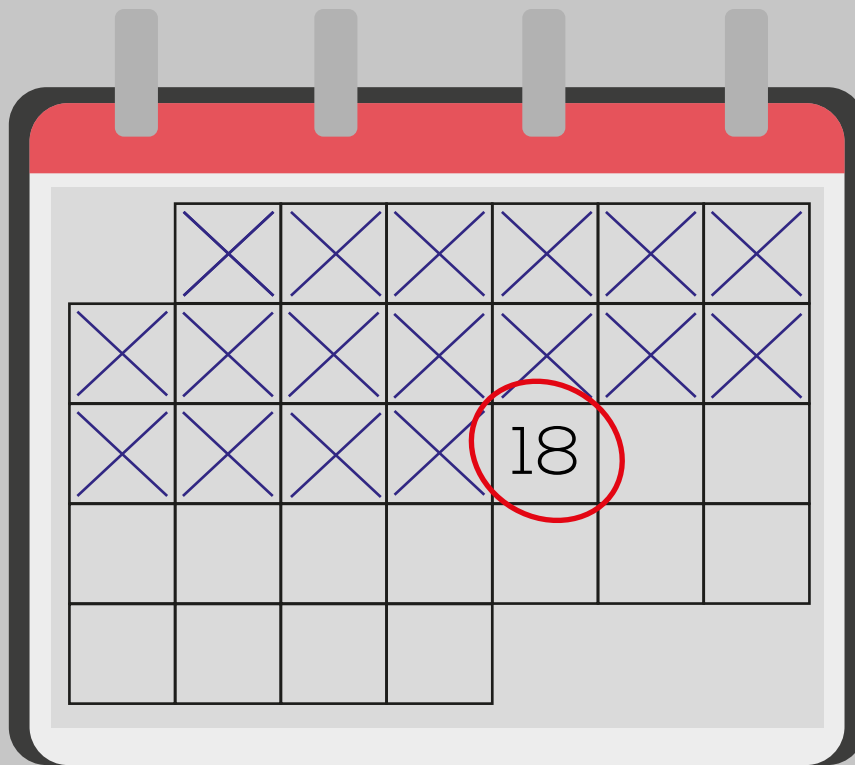
Here comes the cold—and here come the customers.

Chances are, each year when heating season hits you're overwhelmed with breakdown calls as well as urgent messages from customers who procrastinated on getting their heating systems checked...and who want it done *right this instant*.

Chances are also good that every year, your field service business struggles to keep its head above water, and then at the end of the season you're wondering what happened to all that work you had only a month before. Where once you heard the sound of phones ringing and texts chiming, now you hear only crickets.

Make this the year your business sails through the busy heating season, brings in loads of profits, and keeps the good times rolling all year round. Here's how. We included a handy checklist at the bottom of each tip so you'll be right on track to more profits and less stress this winter.

# 1.



## Get planning

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Don't let the winter rush take you by surprise—again. Make plans now, while you have a bit of time, for how you'll get your field service business through the heating season.

### GET-IT-DONE CHECKLIST

- ☐ Take a look at previous years' records to determine how busy your business is likely to get.
- ☐ Decide whether it makes sense to hire temporary staff to help out during the busy season. (If it does, keep an eye out for our upcoming posts on how to recruit top engineers on the Commusoft blog.)
- ☐ Plan a training session for your staff on how to prioritise tasks when they're overwhelmed with customer projects.
- ☐ Figure out which productivity apps and tools can help you and your staff get more work done in less time, to avoid last-minute freak-outs when things get busy.
- ☐ Brainstorm ways to keep the customers flowing in even after the heating season ends. [Here are some ideas for you](#) (see point #4).



# 2.

## Get your customers on board

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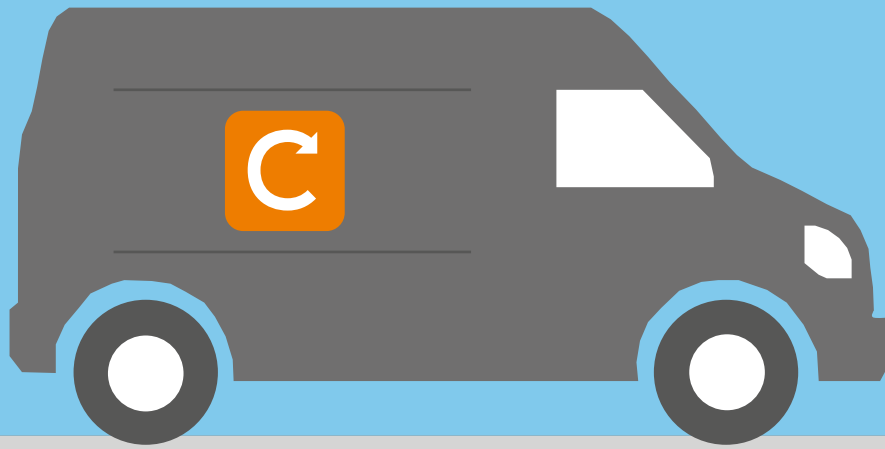
Well before your business goes crazy with the cold weather, try to train your customers to request regular maintenance visits during the summer instead of the winter. We recommend segmenting your customer base to determine who would be most receptive to this idea—such as customers with older boilers that need regular service—and offering them an incentive, like a free home energy assessment, for scheduling their service in the summer.

Want more details? We've got a [whole post on the topic](#) just for you.

### GET-IT-DONE CHECKLIST

- ☐ Segment your customer database to find the customers who would be most receptive to a summer service offer.
- ☐ Brainstorm ideas for incentives that will entice customers to schedule services during the summer without cheapening your brand. Choose one.
- ☐ Be sure you have the resources to implement the incentive; for example, if you'll be offering free home energy assessments, are your engineers qualified to perform them?
- ☐ Write the copy for your email offer.
- ☐ Design and schedule the email.

3.



## Get your vans ready

You know what's the worst time for your service vans to break down? It's when your engineers are running from project to project during the busy heating season. That's why it's key to clean your service vans and take care of any routine maintenance and needed fixes before you're slammed with work.

### GET-IT-DONE CHECKLIST

- ☐ Stock up on van-cleaning products and equipment.
- ☐ Determine which vans need servicing, and be sure you have the parts you need.
- ☐ Decide who will be doing the cleaning/servicing and figure out when they have time in their schedule.
- ☐ Schedule a time to clean and service all your service vans and add the date to your project management calendar.
- ☐ Once the service vans have been cleaned and serviced, follow up to make sure all the tasks were completed properly and no vans need additional work.

# 4.

## Get tech

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The technology your field service business uses, from apps to hardware, impacts how efficient and productive you and your staff are when projects start piling up.

Think about the tech you have now and how well it serves your business. Are your engineers stuck with devices that are slow or unreliable? Is your small business bookkeeping software not keeping up with your company's growth? Are your desktop computers crashing more and more often?

Next, look into the cost of upgrading or replacing those tech tools that aren't serving your business. Keep in mind that you can often make up for the extra costs through increased productivity and fewer repairs. (Within reason! An upgrade from a low-cost PC to a £2,500 desktop will probably not pay for itself anytime soon.)

Finally, update any tech that you'll be continuing to use: Run all the software updates you've been putting off, and be sure you have the most recent version of all your apps. That way, you and your employees won't be interrupted by malfunctioning software and "please update now" pop-ups while you're dealing with an avalanche of customer projects.

Afraid to spend on new tech tools? We bust all your excuses [in this post](#).

## GET-IT-DONE CHECKLIST

- ☐ Make a list of all the tech tools your team will depend on this heating season. Some to consider:
  - Backup solutions (for example, external hard drives, cloud-based systems like Carbonite...whatever you use to back up key files.)
  - Apps that you, your office staff and your engineers use on your devices—like Commusoft, messaging apps, GPS apps, and so on.
  - Software packages such as the Microsoft Office suite, Adobe products, etc.
  - Hardware like desktop computers, laptops, and scanners.
  - Devices, from smartwatches to tablets.
- ☐ Determine which tech can be updated, which need to be replaced, and what tools you need that you don't have at all.
- ☐ Schedule any updating tasks in your calendar or assign the task to a staff member.
- ☐ For tech tools you'll be buying, create a list of your needs. For example, if you're looking for a tablet for your engineers, you may decide you want a rugged interface and a Mac OS.
- ☐ Comparison shop for the tech you need. We list some of our top budget-friendly picks [on the Commusoft blog](#), and have posts on the best tablets and phones for field service engineers [here](#).
- ☐ If needed, schedule training sessions for your employees on how to use the new technology.

# 5.

## Get Commusoft

We can't end this guide without recommending you try our own solutions! Profiting through the winter season is easier when you use Commusoft—the all-in-one, cloud-based software solution designed for field service businesses with multiple engineers.

Commusoft helps you manage your customer database, email communications, quotations, jobs, engineers' diaries, safety certificates, and invoicing, and it integrates with popular accounting packages like Sage, QuickBooks, and Xero—all from your PC, Mac, iPhone, iPad, Android phone or Android tablet. Commusoft's offline application keeps your computer and mobile devices in sync, so you can run your business from the office and on the road.

Boosting your field service business's efficiency this winter means purchasing one software solution that takes care of multiple tasks. That's Commusoft.

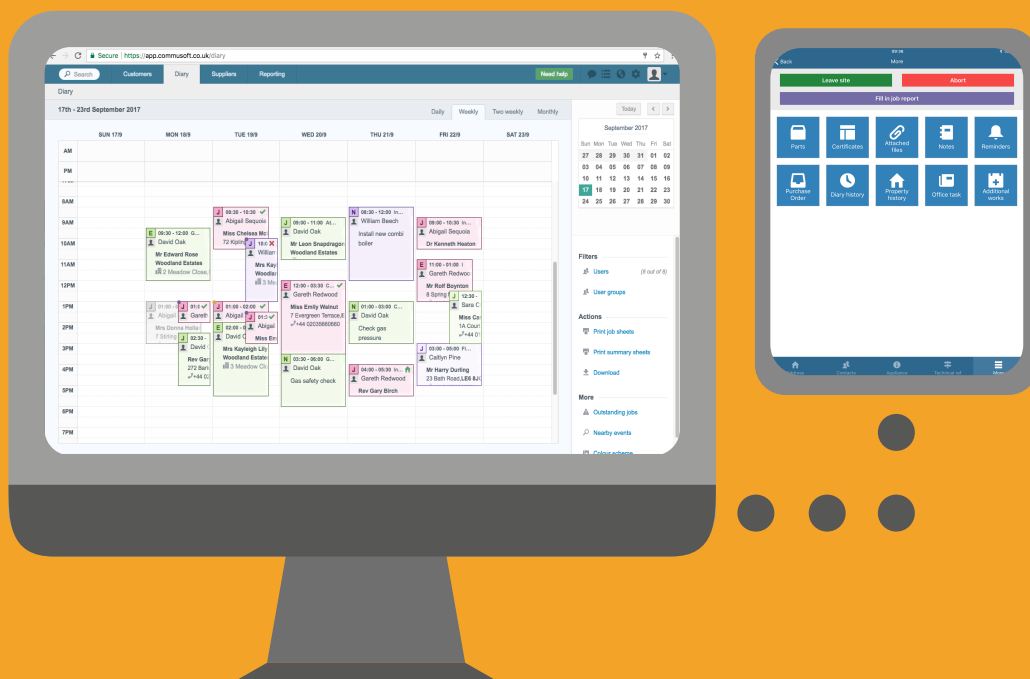
### GET-IT-DONE CHECKLIST



[Watch our 15-minute demo.](#)



Give us a call at 0203 0266 266 or [get in touch with us here](#) to schedule a free personalised demo of the Commusoft Workforce Management solution.





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