



COMMUSOFT HELPS HEATING SOUTH WEST PERFECT THEIR CUSTOMER JOURNEY

You'd expect that a field service business would want a job management system to, well, get more jobs. But that's not what it was about for Heating South West Limited. This 25-employee gas and plumbing company in Liskeard, Cornwall, was instead looking to remove stress from their customers and their staff—and they turned to Commusoft to help.

GUN SHY AFTER A SUB-PAR SOFTWARE EXPERIENCE

Heating South West manufactures and services its own range cookers, sells wood-burning stoves, and offers many other services. Part of the business's M.O. is to provide service in a way that makes their customers feel confident and relaxed; in fact, the tagline on one page of Heating South West's website is 'Choice, Customer Care & A Relaxed Atmosphere'.

The business does two to four jobs per engineer per day. 'We cover pretty much the whole of the UK, which involves a lot of travelling and a lot of time,' says Brian Hardy, son of the company's owner. 'We're not trying to increase the amount of jobs that we can do, we're just trying to make ourselves more efficient with it.'

Brian laughs that from 1975 until now, Heating South West's way of doing organising and invoicing was 'Hard work and a lot of paperwork'. He wanted to implement field service management software, but his father,

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the company founder, had a bad experience years ago with a software system that overpromised and underdelivered. So Brian carefully examined several different field service management solutions before finally choosing Commusoft.

'It was partially due to a recommendation from an electrician friend of mine, but mostly it was just down to homework and comparing the different types of software,' he says. 'Commusoft seemed the most user-friendly, and I also liked the fact that it appeared to be constantly updating, constantly evolving, with more features always being added. That put my mind at rest that Commusoft was ahead of the game.'

THE CUSTOMER JOURNEY: BEFORE AND AFTER COMMUSOFT

Let's get back to that ideal of the relaxed, confident customer. Heating South West has been testing Commusoft among a group of several employees, and experiencing how the software is helping to smooth out every part of the customer journey—from the first call to the final invoice.

Scheduling Service: Before

In the past, when a customer phoned to schedule a job the service coordinator, Steve, booked it into a paper diary and decided which engineer would be the best to send based on their experience. He then wrote out a job sheet and gave it to the engineer, who headed out to the job. At the end of the week, Steve received a load of job sheets that he then had to process through the company's accounting system.

Scheduling Service: After

With Commusoft's scheduling features, Steve will be able to easily send the closest engineer who also has the right experience for the job. The GPS feature also lets Steve know where the engineers are at any time. 'Having the software say, "They're at this job," or "They've finished this job and now are on the way to the next job" gives you an understanding as to how well they're doing during the day,' says Brian.

These Commusoft features help the customer as well: 'The situation we have at the minute is that, being countrywide, we could be doing a batch of jobs and then a new job will come in and you'll think, "I was up there only two days ago!",' Brian says. 'Whereas if we'd known at the time we could've planned it better. Commusoft gives customers a quicker response time and enables us to not feel so stressed whilst giving that response.'

Handling Schedule Changes: Before

When an emergency job pops up or a customer cancels a service appointment, it can throw a schedule into chaos—leading to missed appointments and late engineers. 'We've had paper diaries up until now,' explains Brian. 'If we had to change something, which happens quite frequently, then we have to either tippex it out or put sticky notes over it and then rebook it, which is confusing and very, very time-consuming.' The more time office staff spend on managing the diary, the less time they have to focus on their customers.

Handling Schedule Changes: After

Commusoft makes it easy to make changes to the schedule. 'Being able to just drag and drop diary events in Commusoft is far, far easier,' says Brian. 'It will help us to put jobs in further ahead and plan them better.' Not only that, but Commusoft syncs the schedule to the diary on engineers' mobile devices, so the engineers know immediately when there's been a change.

Sending the Invoice: Before

Right now Heating South West is using a 'prehistoric' accounting system that's embedded in the company's accounting structure.

Once the company has fully implemented Commusoft, they plan to use one of Commusoft's accounting integrations like Sage or Xero. 'For the time being, we're just doing accounting in the accounting package itself,' Brian explains. 'Then we manually export all the details into our current accounting package. Nisha [Commusoft's Training Manager] came up with a solution for the easiest way to do that.'

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Sending the Invoice: After

Once Heating South West moves away from its homegrown system to one of Commusoft's accounting integrations, when they raise an invoice Commusoft will automatically send the information to the accounting package. The system will automatically generate invoices, payments, and credit notes. Sending invoices immediately after a job means Heating South West will get paid faster—and, believe it or not, customers want to receive invoices quickly and not have to chase them down, meaning this feature will boost Heating South West's customer satisfaction rates as well.

Service Reminders: Before

Reminding customers of when their equipment or appliances are due for a service is a great way to increase customer happiness and generate recurring revenue. However, it can also be a time-consuming, laborious project.

'Steve basically had a book, where every four weeks he'd log in the jobs that we'd done,' explains Brian. 'Then that went into a book that's a year behind, and he'd look at that book a year down the line and say, "We did a service for these customers last year, so we'll send them a reminder letter."' Finally, Steve would personalise a template letter and send it via post.

**"Commusoft's
automated service
reminder feature
saves us a lot of time."**

Service Reminders: After

Commusoft includes a Service Reminder feature that takes all the stress off of Heating South West's service coordinator and other staff. Two weeks before the service is due, Commusoft automatically sends service reminders to customers via SMS, email, or letter. Each day when Steve logs in, he gets a notification telling him how many reminders were sent. For print reminders, there are PDF letters attached to the notification; Steve can either print and send them manually, or use Commusoft's Print & Post feature to have it done automatically.

STRESS LESS, GET MORE LOVE WITH COMMUSOFT

While Commusoft's features are helping to perfect the customer journey, we can't ignore how the solution also helps everyone in the business, from the office staff to the owners. Says Brian, 'We're trying to keep the stress down off the engineers as well as our service coordinator and, ultimately, us. Yes, we're trying to give a better service, but we're also trying to make sure that, as an employer, our employees are happy.'

Commusoft's service reminder, accounting, and scheduling features are helping Heating South West's customers—and their employees—enjoy streamlined, stress-free jobs.

Feel like you're facing the same problems Brian had? [Watch our 15-minute demo](#) to find out how Commusoft's job management software can help you go paperless and optimise all your day-to-day processes.