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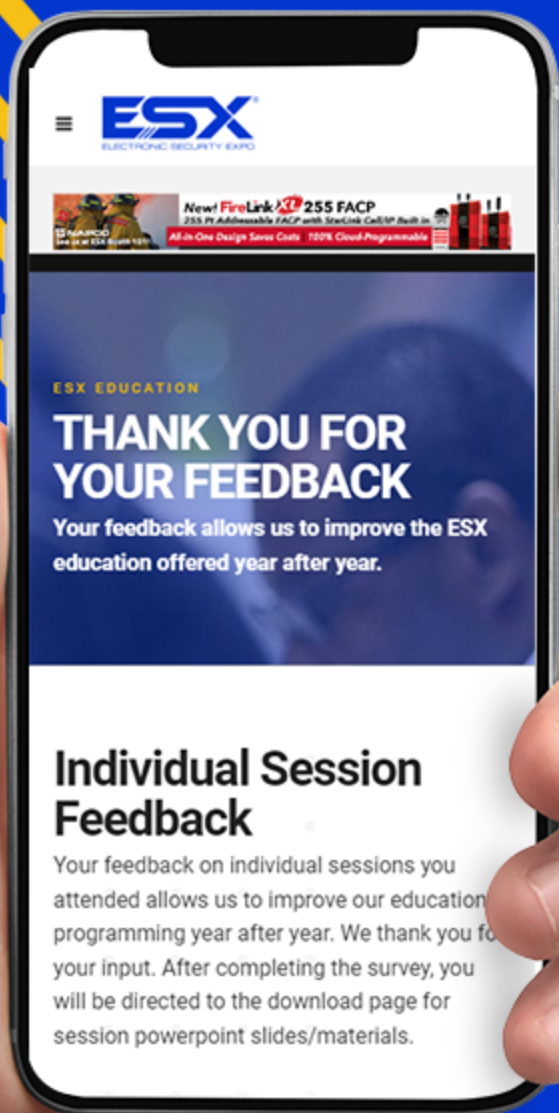


ELECTRONIC SECURITY EXPO

**OPERATIONS TRACK**

**6 WAYS TO REDUCE TRUCK ROLLS,  
OPTIMIZE FIELD SERVICES AND  
INCREASE CUSTOMER SATISFACTION**

# ESX FEEDBACK



1

**ANSWER 5  
QUESTIONS  
ABOUT THIS  
SESSION**

2

**GAIN  
ACCESS  
TO THE PPT  
SLIDES**

3

**BE ENTERED  
TO WIN A  
\$100 GIFT  
CARD**

**3 GIFT CARDS (\$100 EACH) AVAILABLE FOR SURVEY RESPONDENT RAFFLES**

**WINNERS WILL BE NOTIFIED THROUGH THE ESX APP**



**THE ELECTRONIC  
SECURITY EXPO IS  
OWNED BY:**

**ESA** ELECTRONIC  
SECURITY  
ASSOCIATION®

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**TCX**

**The Connection Xchange**

# Anti-Trust

**Neither ESA nor any committee, product group, conference or activity of ESA shall be used for the purpose of bringing about, or attempting to bring about, any understanding or agreement, whether written or oral, formal or informal, express or implied, among competitors with regard to prices, terms or conditions of sale, discounts, distribution, volume of production, territories or customers.**

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# **COURSE** **OBJECTIVES:**

## **6 Ways to Reduce Truck Rolls and Optimize Field Services**

- How much it really costs to roll a truck and why you should know
- What your First-time Fix Rate (FTFR) is
- How to increase your technicians' productivity and improve the customer experience
- Top ways to reduce truck rolls
- Technologies, such as virtual tech calls, that can enhance the service experience without rolling a truck

# MEET THE SPEAKERS



**CINDY  
PONDER**

---

**VP OF OPERATIONS  
BATES SECURITY**



**MISTY  
BARKER**

---

**SERVICE DISPATCH  
MANAGER  
BATES SECURITY**

# CAPTURING THE COST OF A TRUCK ROLL



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# LABOR COSTS



## Largest Cost Contribution

Hourly/Salary

Benefits

Worker's Comp

Uniforms

Travel Distance/Travel Time

Dispatcher's Time

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# LABOR COST EFFICIENCY



## Utilization

- Identify low utilization %'s
- Review go-backs and trips to the office
- Utilization already identifies non-billable time, so we need to be as efficient as possible
- Same Day Close Goals (FTF)
- Utilization goals (estimated)
  - Service 65% Install 85%

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# LABOR COST EFFICIENCY



## Utilization

- Communication tools
  - Needing parts
  - Traffic
  - Job site information
- Other Departments
  - Sales
  - Human Resources
  - Finance

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# VEHICLE COSTS

## Maintenance

Avg Repair costs

## Insurance

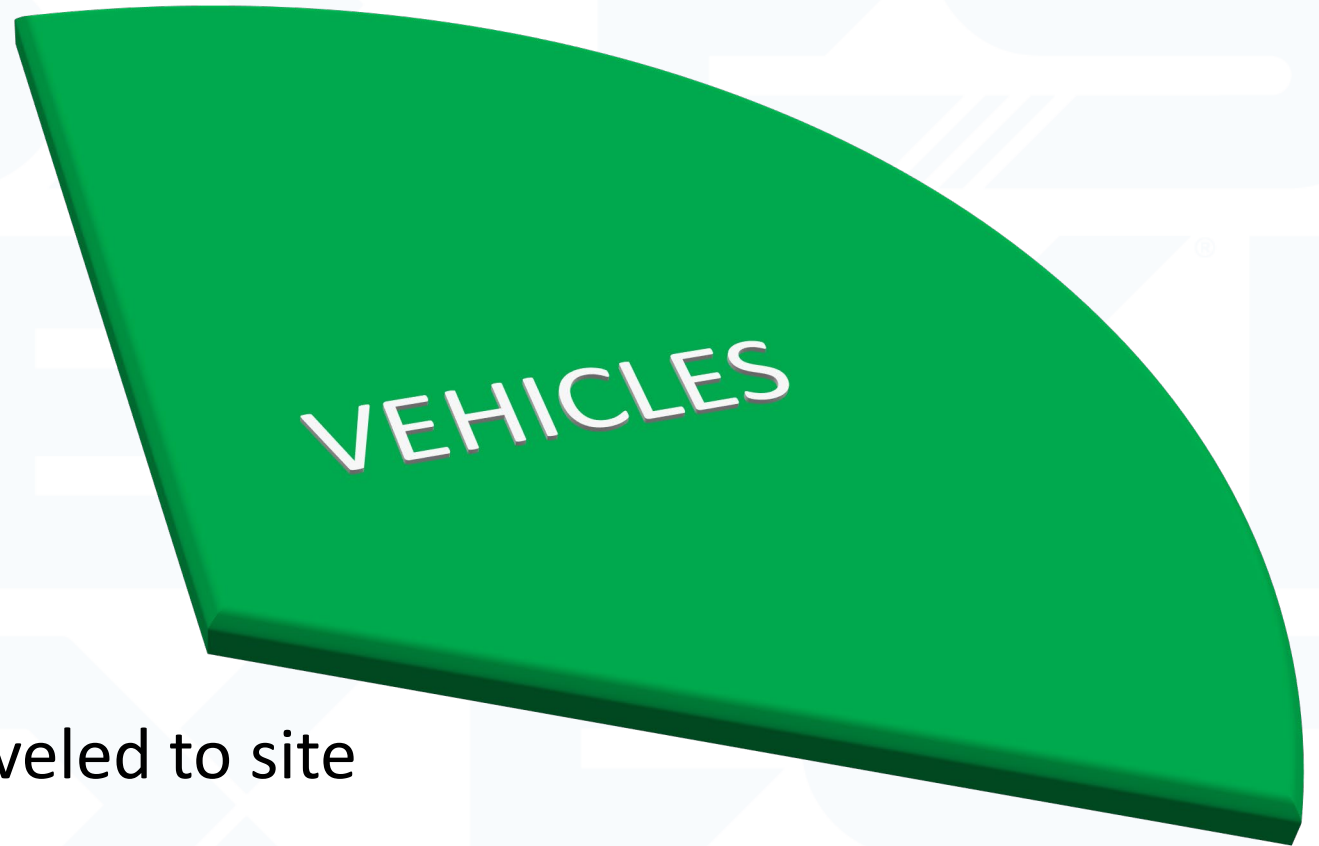
Yearly increases

## Fuel

Avg cost/gal

Avg distance/time traveled to site

## Depreciation



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# VEHICLE COST EFFICIENCY

## Maintenance

Fleet program

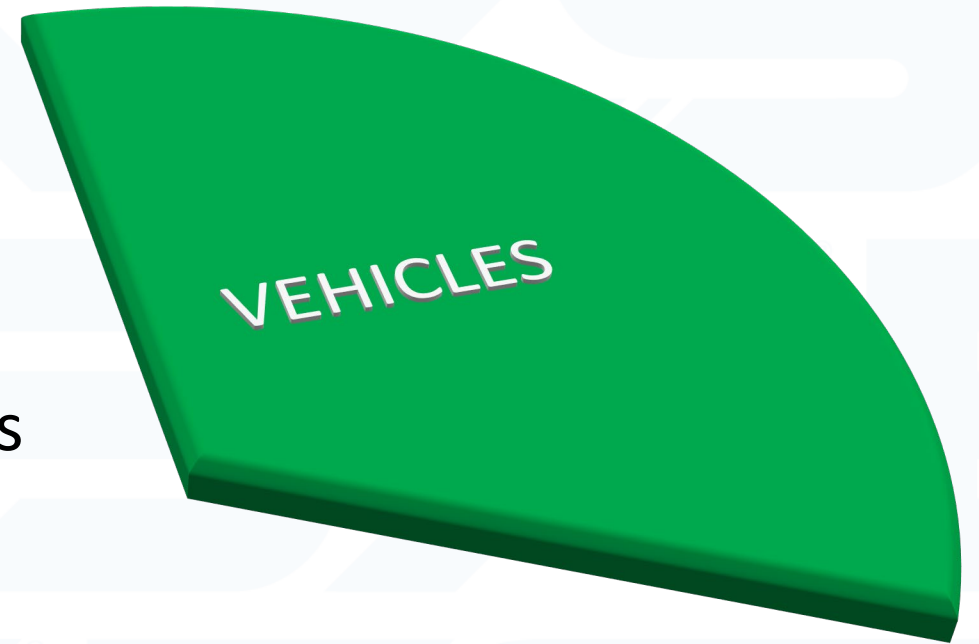
## Insurance

Driver Safety Training = cost savings

## Fuel

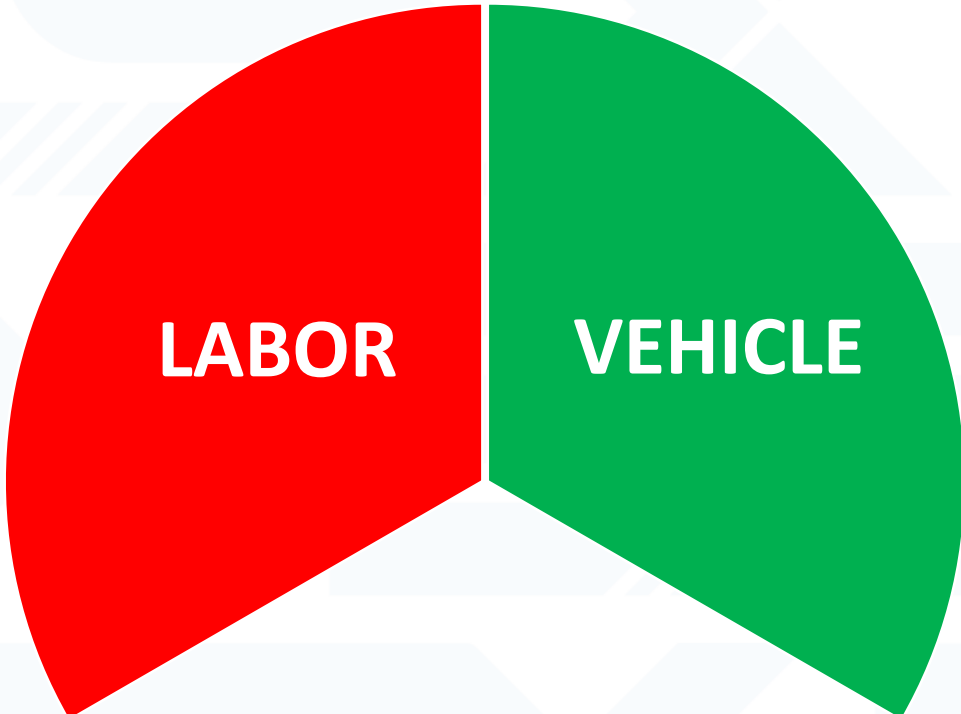
Using app for fuel efficiencies

Average vehicle cost for a truck roll based on average distance/average time



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# LOADED LABOR RATE



# OPPORTUNITY COSTS

*Time and money that could have been taking care of another customer.*

Do you know your average billable service call?



OPPORTUNITY

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# OPPORTUNITY COSTS

- *After polling various companies, average billable service ticket \$290 - \$340*
- 96% average Same Day Close !!  
*(great selling tool!)*
- Completed Service!
- Billable Service ✓
- Satisfied Customer ✓
- Happy Tech ✓
- Happy Dispatcher ✓
- Happy Manager ✓
- Happy President and Owner ✓ *Priceless*



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# Estimates

30 minutes to reach site, avg  
15 minutes park/prep  
15 minutes close out  
= 60 minutes time

LLR ~ \$70

Opportunity Cost ~ \$340  
~\$410

- Administrative time
- Truck re-routing
- Possible office visit required

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# Technician Tools








- Training, training, training
- Correct Inventory
- Pre-Call!
  - ✓ Site readiness, network logins/passwords
  - ✓ Review service or job with customer - expectation
- Job ticket review
  - ✓ Parts sign-off
- Check lists
  - ✓ Specific Systems, on-site walk thru, close out
- Followed **By All**

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## INSTALL PRE-VISIT CALL TO CUSTOMER








BEFORE HEADING TO CUSTOMER SITE

*\*CONFIRM PROGRAM AND TEST SCHEDULE WITH CSC\**

- INTRODUCTION 
- ETA 
- PROVIDE A BRIEF DESCRIPTION OF SCOPE/WORK 
- SHARE APPROXIMATE TIME ON JOB 
- ENSURE LOCATION'S READINESS 
- ASK IF THERE ARE ANY RESTRICTIONS 
- CONFIRM INSTALL 

## SERVICE PRE-VISIT CALL TO CUSTOMER

BEFORE HEADING TO CUSTOMER SITE

- INTRODUCTION 
- ETA 
- ASK CUSTOMER FOR BRIEF DESCRIPTION OF PROBLEM. ARE THERE ANY SAFETY CONCERNS OR WORK LIMITATIONS? 
- TRY TO VERIFY SYSTEM TYPE 
- VERIFY CUSTOMER SITE CONTACT AND NUMBER 
- VERIFY LOCATION OF MEETING 
- IF POSSIBLE, ATTEMPT TO TROUBLESHOOT OVER PHONE 

# Sales Tools

## Site Conditions Worksheet

- Description, special requirements
- Subcontractor info, deployment
- Job site info
  - ✓ Site Contact
  - ✓ Ceiling Type
  - ✓ Accessible hours
  - ✓ Drawings – FBA icons
  - ✓ Expected completion
  - ✓ Safety requirements

## Customer expectation

- ✓ What is their goal for their system install?

# Sales Tools

SITE INFORMATION		CONTACT INFORMATION	
Customer Name	<input type="text"/>	Customer Contact	<input type="text"/>
Site Name	<input type="text"/>	Phone	<input type="text"/>
Address	<input type="text"/>	Email	<input type="text"/>
City	<input type="text"/>	Premises Contact	<input type="text"/>
State	<input type="text"/>	Phone	<input type="text"/>
Zip	<input type="text"/>	Email	<input type="text"/>

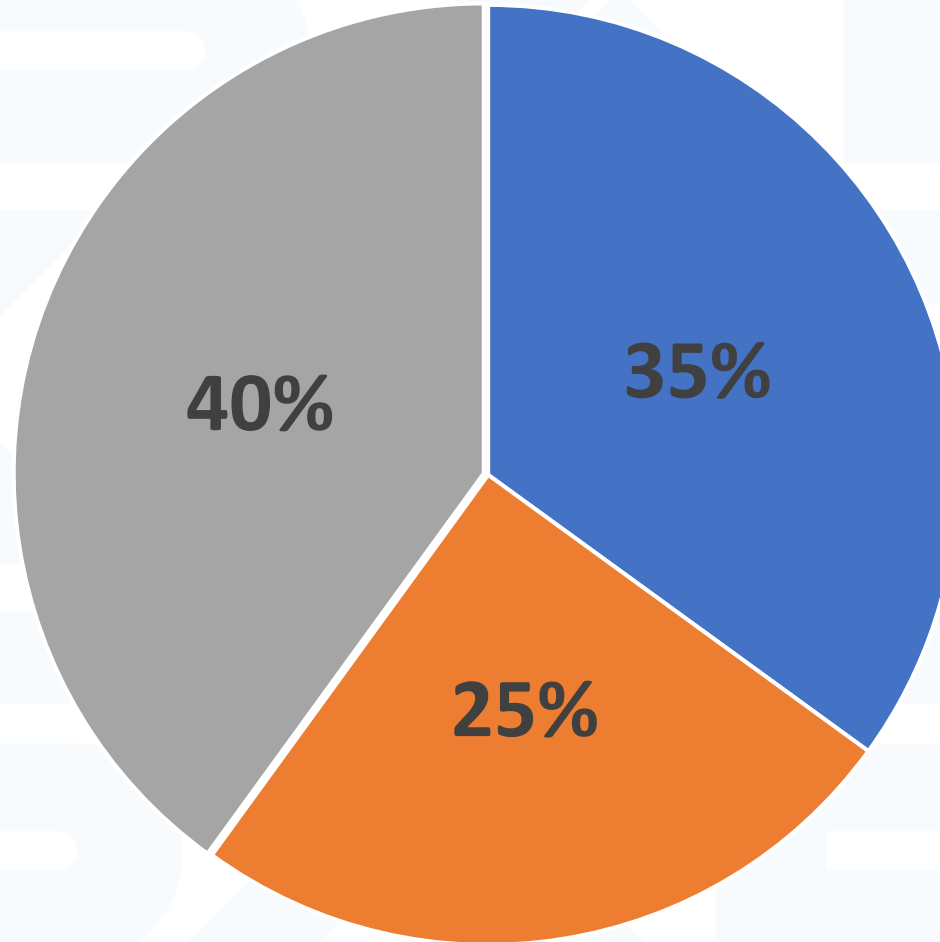
System Type  Intrusion  Fire  Access  Video  Other

## JOB SITE INFORMATION & RISK FACTORS

Required Start Date	<input type="text"/>	Permits Required?	<input type="checkbox"/> Yes <input type="checkbox"/> No Specify <input type="text"/>
Required Finish Date	<input type="text"/>	Under Construction?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Building Sq. Ft.	<input type="text"/>	Quick Turn Job?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Access Hours	<input type="text"/>	High Security?	<input type="checkbox"/> Yes <input type="checkbox"/> No Specify <input type="text"/>
Ceiling Type	<input type="checkbox"/> Open <input type="checkbox"/> Drop <input type="checkbox"/> Hard Deck <input type="checkbox"/> Other <input type="text"/>	Plenum Cabling?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Ceiling Height	<input type="text"/>	Customer Cabling Requirements?	<input type="checkbox"/> Yes <input type="checkbox"/> No Specify <input type="text"/>
Lift Required?	<input type="checkbox"/> No <input type="checkbox"/> Electric Scissor <input type="checkbox"/> Boom <input type="checkbox"/> Other <input type="text"/>	Site Safety Training?	<input type="checkbox"/> Yes <input type="checkbox"/> No Who, # <input type="text"/>
Lift Type	<input type="checkbox"/> Indoor <input type="checkbox"/> Outdoor	Site Hazards/Liabilities?	<input type="checkbox"/> Yes <input type="checkbox"/> No Specify <input type="text"/>
Conduit Required	<input type="checkbox"/> Yes <input type="checkbox"/> No	Customer Training?	<input type="checkbox"/> Yes <input type="checkbox"/> No Who, # <input type="text"/>
Door Frame Type	<input type="checkbox"/> Hollow <input type="checkbox"/> Slashed <input type="checkbox"/> Other <input type="text"/>	Device Locations Accessible?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Wall Type	<input type="checkbox"/> Drywall <input type="checkbox"/> Concrete <input type="checkbox"/> Other <input type="text"/>	Power Available?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Network Type	<input type="checkbox"/> Customer <input type="checkbox"/> Private <input type="checkbox"/> Other <input type="text"/>	Phone Lines Available?	<input type="checkbox"/> Yes <input type="checkbox"/> No
IT Contact Name	<input type="text"/>	Sufficient Lighting? (Video)	<input type="checkbox"/> Yes <input type="checkbox"/> No
Drawing of premises, with all devices properly noted, completed before leaving customer site?		<input type="checkbox"/> Yes <input type="checkbox"/> No	

## Wasted Truck Rolls - Service

■ Parts challenges   ■ Incorrect diagnosis   ■ No pre-call



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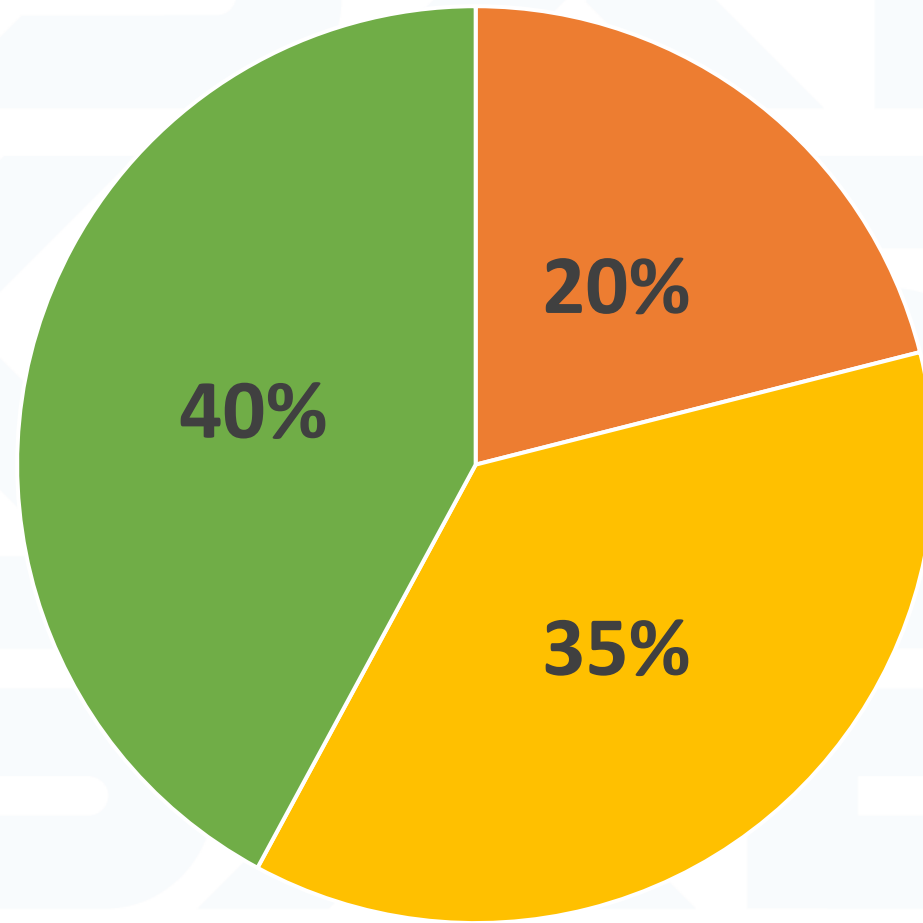
# Dispatchers – Service Tickets

- ✓ Accurate diagnosis or customer request
- ✓ Correct customer info on ticket
- ✓ Scheduling right technician for task
- ✓ Available inventory
- ✓ Scheduling Smart
- ✓ Prepared for Dynamic Dispatching!!!

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## Wasted Truck Rolls - Install

- Incorrect Skillset
- Inventory challenges
- No pre-call



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# PMs/Schedulers – Install Jobs

- ✓ Skill set of tech aligns with job
- ✓ Plan for contingencies
- ✓ Provisioning
- ✓ Review labor and parts on job
- ✓ Site supervision

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# Trouble-shooting with Customer

- Who?
  - Customer Service Center
  - Dispatchers
- Cheat Sheets
- Attend Technical Trainings
- Dynamic Dispatching
- Remote Customer Training
- Remote logins, etc.
- Shared By All

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# Support Technology & Tools

- Training documents sent electronically
- Other technical staff expertise
- Remotely monitoring systems and troubleshooting them before customer even knows there is an issue (video health monitoring)
- Testing switches that will detect issue and reset port
- Support Center Engagement

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# Save the Truck Roll

Rules & Guidelines

## Rules:

- You must exhaust all remote options. i.e. dialing into programming, power cycling, rebooting, etc.
- You must also post this info in the *Save the Truck Roll Channel*: Customer name, account or ticket number, the issue and how you resolved it.
- You must note the account or ticket.



## How it Works:

- For every truck roll you save you get 1 Gold Coin.
- For every open service ticket opened by someone else you resolve without going on site, you get 2 Gold Coins.
- Whoever has the most gold coins at the end of the round is the winner!

## Tie Breaker:

- If both players have an equal amount of gold coins, the player that was able to close the most tickets will be declared the winner.

## The Prize:

The winner will receive:

2 Hours off phones



A \$20 Giftcard



## Rules:

- You must exhaust all remote options. i.e. dialing into programming, power cycling, rebooting, etc.
- You must also post this info in the *Save the Truck Roll Channel*:  
Customer name, account or ticket number, the issue and how you resolved it.
- You must note the account or ticket.



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Leaders that promote a culture of Doing  
What's Right and celebrating  
accomplishments!




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Leaders and Team Members that understand the impact of saved truck rolls – for the company and the customer!



**In 2022, 70 Saved Truck Rolls;  
508 Resolved Remotely**

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*By changing the way we operate, and focusing on saving truck rolls, we not only improved Customer Satisfaction and Loyalty, revenue and attrition, successful relationship between Sales and Operations but also Technician Morale and culture excitement! Everyone found that they play a part in the processes that helps to save truck rolls!*

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**RATE THIS SESSION**  
**ESXWEB.COM/FEEDBACK**



# KEYNOTE LUNCHEON

**11:30AM**

**MAIN STAGE**

**Soundtracks: How the Best Teams Overcome Overthinking to Navigate Change, Increase Productivity and Win Consistently**

