



**skycreek**  
*optimizing contact*



A SkyCreek White Paper

# 5 Key Steps to Approaching 1 Hour Appointment Windows

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The Holy Grail of Field Service Providers:

# 1 Hour Appointment Windows

It's Not Fantasy...It Can Be Reality...

**These five key customer contact management requirements drive your ability to dispatch dynamically and significantly tighten your service appointment windows.**

- Do you have the capability to share up-to-the-minute customer appointment statuses dynamically across your organization?
- Are you proactively notifying customers of service-affecting outages to prevent unnecessary service appointments from entering the system?
- Are you employing advanced appointment cancellation, rescheduling, and service-no-longer-required processes for unconfirmed customers leading up to the day of job?
- Can you temporarily hold unconfirmed customer dispatches from being rerouted to allow for additional customer confirmation attempts?
- Is your customer contact program directly integrated with your work force management (WFM) system?

For service providers, schedule accuracy and resource utilization are key financial performance drivers. These factors directly affect appointment window times and have a direct impact on customers' perceptions of your brand and its value.

If your customer appointment confirmation model goes no further than routine appointment reminders, you're wasting money on late or missed appointments and risk seriously eroding customer satisfaction and your brand's reputation. To achieve shorter appointment windows, you absolutely must move past basic appointment

reminders and embrace a more sophisticated, automated, and integrated customer contact solution that works in concert with your WFM system. With this powerful model, you can factor real-time customer statuses into your route and resource optimization efforts.

## Why Your Appointment Windows Continue to Lapse

The "appointment nirvana" of 1 hour, even 2 hour, appointment windows remains elusive for many service providers because they can't effectively tie the customer into their WFM decision making. Many rely on blunt automated contact technologies to remind customers of upcoming scheduled service calls. However, these simple practices do not effectively reach customers, assure that the information is delivered and understood by the customer, and capture actual appointment confirmations or cancels. These approaches fail to account for shifts in customer contact preferences (IVR, email, text) or assess historical best times to contact customers to maximize reach and confirm rates. Moreover, they fail to consistently leave proper messages across a diverse answering service population, and do not integrate customer appointment statuses across different departments, functions and systems within the field service operation.

These one-sized fits all technology approaches of old are growing less effective and more expensive over time. Why? Companies are issuing more and more contact to try to compensate for declining reach and confirm rates.

As a result, customers continue to miss appointments, arrive late, or lack critical information upon arrival. This further taxes your front-line support staff, increases costs, and inhibits your team's ability to serve other customers.

You must move from a largely reactive service and installation model to a higher-quality, more dynamic, individualized appointment reminder and confirmation process. You have to eliminate all avoidable missed appointments and improve the customer experience. How can you make such profound service improvements while containing costs and deliver significant ROI?

**SkyCreek recommends these five proven steps:**

## **Step 1:**

### **Real-Time Integration with WorkForce Management (WFM) Systems**

When your technician arrives at an appointment to find the customer not home or no longer in need of service, it increases your costs as well as subsequent customer wait times. Having real time integration between your customer contact solution and your workforce management system (WFT) eliminates this problem. It allows you to dispatch the technician to a confirmed customer or tell him not to bother with a particular appointment. You can eliminate wasted truck rolls and tighten appointment windows for the rest of the day. Real-time WFM integration also makes last minute final contact attempts worthwhile, since you may confirm that a customer will be home, so that the technician knows not to skip that service call.

However if your customer contact and your WFM systems are not integrated, you can't factor up-to-the-minute contact data into your dispatch planning. This means you're not even at the starting line in today's new world of dynamic, personalized, and highly professional field services.

## **Step 2:**

### **Day of Job Customer Contact**

You may think it's sufficient to reach out to customers 48 or 24 hours before to confirm service appointments. However, your customer's plans change or service can become unnecessary after the confirmation call.

SkyCreek's experience shows that it's much more effective to add last attempt appointment communications to customers on the day of the job. You may opt to contact all customers on the day's schedule, or only customers with unconfirmed appointments. Some SkyCreek clients even elect to cancel customer appointments on the day of scheduled service if repeated attempts to confirm are unsuccessful. They notify the customer via text, IVR, or email to remind them of the confirmation policy, and allow them to reschedule if service is still required.

Day of Job reminders, confirmations, cancels and even automated cancellation policies of unconfirmed customer appointments all work to substantively weed out significant layers of waste in your field service operation.

## Step 3:

### Appointment Jeopardy Rules to Minimize Waste

Today's savvy companies use "jeopardy rules" as part of an advanced appointment management strategy. Simply put, a jeopardy rule comes into play when a customer is in jeopardy of missing an appointment or when a truck is in jeopardy of making a wasted trip. To use jeopardy rules effectively, you need sophisticated ability to confirm appointments and measure customer compliance against service polices. These factors heighten your ability to manage unconfirmed customers on the day of their appointments. For example, you can apply rules to cancel unconfirmed appointments automatically within a specific number of hours before a scheduled service appointment. SkyCreek worked with one national service provider to institute a final "jeopardy contact" after pre-appointment and day of job confirmation attempts proved unsuccessful. The final jeopardy contact let customers know that their appointment would automatically cancel if they did not call to confirm prior to a specified time. Thanks to these advanced jeopardy rules, the service provider cut all wasted truck rolls due to unconfirmed customers and lowered missed appointment statistics. As an added benefit, the company lowered reschedules, since many of their missed appointments stemmed from customers who no longer needed service, but failed to cancel.

An automated confirmation process for technician calls allows your jeopardy rules to define your technology, not vice versa. SkyCreek offers a customer solution model that lets our clients define a flexible automated confirmation process that fits their scheduling processes.

## Step 4:

### Accommodating Customer Channel Preferences

Customers are becoming increasingly particular about the method you use to contact them. Your ability to adhere to those contact preferences ensures a favorable customer experience as well as greater compliance with appointment schedules.

Automated, dynamic customer interaction allows you to take into account individual preference and history when determining the most effective way to reach a customer to confirm their appointment.

You can also notify customers of service outages using their preferred contact method, to preempt unnecessary inbound calls and maintain customer satisfaction levels, even in less than favorable circumstances.

Multi-channel contact introduces additional intelligence to the confirmation process, allowing you to make real-time dispatch decisions on-the-fly based on individual customer preference. For example, you may want to contact a customer twice by their preferred IVR method, but if you can't confirm the appointment you may elect to text them with a final reminder.

Personalized and pertinent customer contact is the future, but expectations for it are hardening today.

## **Step 5:**

### **Automated Cancellations and Reschedules**

When you make a service confirmation contact, giving the customer the ability to cancel or reschedule on the spot alleviates the “no longer needed” service issue and reduces wasted truck rolls that increase cost. You can route inbound calls for reschedules outside of your main support line. SkyCreek can even throttle automated contact based on historical transfer and reschedule request rates so as to manage the inbound volume to your reschedule team. This prevent call center overload and shortens customer wait times.

## **Summary**

These five steps provide the operational foundation for service providers who want to start to use their field services as a profit center versus a cost center. With these techniques, service providers can not only eliminate wasted truck rolls, they can more accurately hone in on actual ATR, ATI and ATD. Plus, they can realistically tighten appointment windows, which drives increased customer satisfaction and improves customer experiences.

## SkyCreek Can Help

From message quality, interaction design, customer preferences, technical requirements to past and future customer contact performance, SkyCreek manages the many variables to optimizing the performance and cost efficiency of customer appointments to move you closer to one-hour appointment windows:

- Real-time workforce management system integration
- Same day customer contact
- Jeopardy rules that define the process, not vice versa
- Automated multi-channel contact
- Ability to offer on-the-spot reschedules

Plus, we name a dedicated account manager to work with each contact program we manage. Our approach assures optimal design of specific customer contact requirements to your unique business objectives. We partner with you to tailor our solutions for maximum performance and cost efficiency—and enhanced customer experiences.

### Our Deep Expertise

Our account managers have an average of 15 years of high-volume customer contact management experience in high-volume telecom, cable, retail, utilities and field service industries. This experience allows SkyCreek to offer a unique consultative approach to designing customer communication programs. Our experts leverage their collective years of industry best-practices, the latest technologies and techniques, and insights from the largest scale contact operations to optimize customer contact performance and cost-efficiency.

If your customers are tired of hearing "we'll be there anywhere from noon until five," it's time you looked into a SkyCreek solution.



## Front-Line Customer Contact & Experience Management

### About SkyCreek

SkyCreek, professionally designs and manages custom multi-channel (IVR, Email, SMS) customer contact and experience management solutions. We optimize the cost-efficiency, experience quality, and operational performance of front-line customer-employee interactions for some of the largest national service providers and contact operations in North America. Our goal is to help companies elevate their use of customer contact technologies to attain breakthroughs in operational cost containment, customer satisfaction and service differentiation.

We do this by bringing together:

- 20 years of customer contact management experience in Fortune 500 service providers
- Hardened, scalable, and advanced multi-channel (IVR, Email, SMS) contact technologies
- Industry best practice contact strategies, interaction designs, messages and techniques
- Enterprise solution development and integration services
- Veteran dedicated contact program management and support
- A flexible partnership approach in working with customers

We host our solutions on our iContact and eTouchPoint platforms, residing on a fully-redundant, scalable, SSAE-16 compliant, geographically-dispersed service infrastructure with data centers in Reston, Chicago, Dallas and San Diego.

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