

# From Inquiry to Install

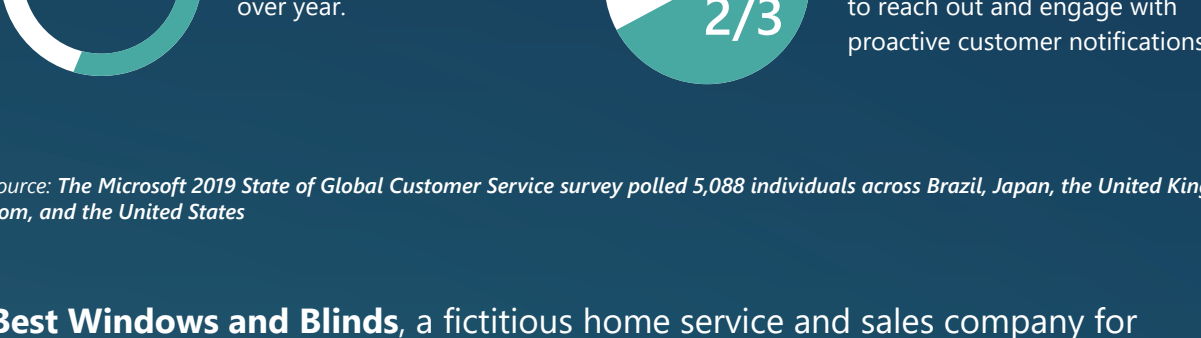
How a home services company crafted powerful customer interactions in real time



Making an emotional connection with customers is critical to building loyalty and increasing retention, and service and sales teams sit in a prime spot to enhance that connection. Every experience a customer has with a home service and sales representative is a direct reflection of a company's brand. You want to turn your in-home sales and service personnel into brand ambassadors, but it's a goal that requires the right service tools and technology from in-coming calls, to ordering, and through execution.

But how many companies provide that seamless experience? According to Microsoft, one out of six companies are still running services operations through a series of manual processes, typically piggy-backing onto a CRM or sales management application, augmented by Excel spreadsheets. The time spent and potential for error are way too high. And the customer experience suffers.

## Connected Home Service and Sales is here to stay



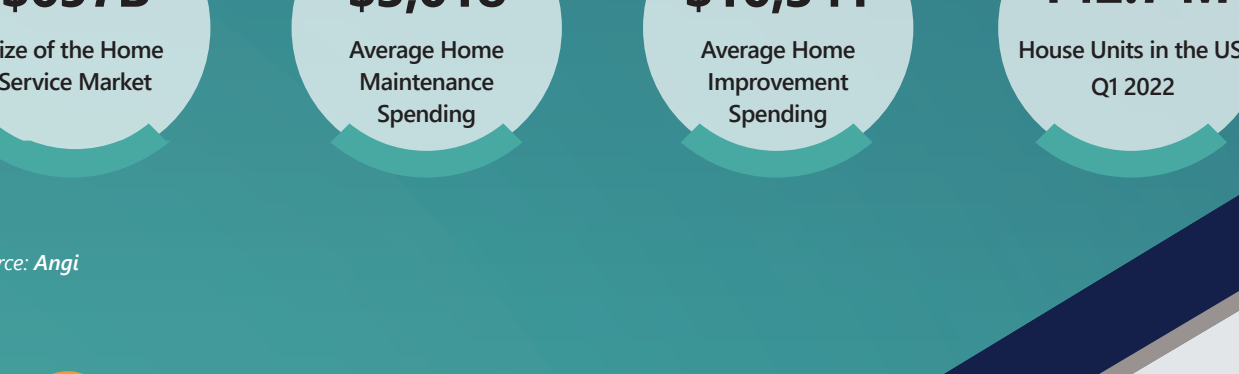
Source: The Microsoft 2019 State of Global Customer Service survey polled 5,088 individuals across Brazil, Japan, the United Kingdom, and the United States

**Best Windows and Blinds**, a fictitious home service and sales company for window furnishings, was like many of its industry peers. It needed to evolve its processes and systems using data and intelligence to deliver a seamless customer experience and increase satisfaction. The company reimaged the way it delivered service, framing its entire approach around integration, collaboration, and data accessibility to build loyalty and increase retention.

### What Drove the Change?



Best Windows and Blinds partnered with Hitachi Solutions to implement an optimized, connected home service experience based on the Dynamics 365 product suite, complete with intelligent scheduling functionality. Now, the service and sales departments are humming along like a well-oiled machine. Follow along as Best Windows and Blinds helps its customer, Sarah, fulfill her request for custom home window furnishings.



Source: Angi

### 9 AM Morning of the Initial Sales Call

Sarah connected with Best Windows and Blinds for home appointment with a sales rep. Sarah has shared what she wants, and Anne, the customer service rep, knows it's all a special order: assorted sizes, colors, fabrics, and styles. Anne estimates that Sarah will be spending substantially to replace all the window coverings in her large home. She adds this information to the appointment request and turns the engagement over to Tom, the scheduler.

Based on Sarah's information, Tom knows he should send a sales rep who is skilled and experienced. Here's where an intelligent scheduling solution comes in. Using a connected, data-driven system, Tom assigns and routes the 'best' rep, Bob, based on skills, location, availability, and individual performance patterns. Tom is ensuring the right salesperson shows up with the right knowledge and experience — it's the beginning of establishing an impactful customer experience.

Also, with the intelligent routing capabilities offered by a connected system, Tom can include the most efficient route to Sarah's home, saving Bob fuel and time. Then, if he gets held up in traffic, everyone is made aware and the appointment can be dynamically adjusted.

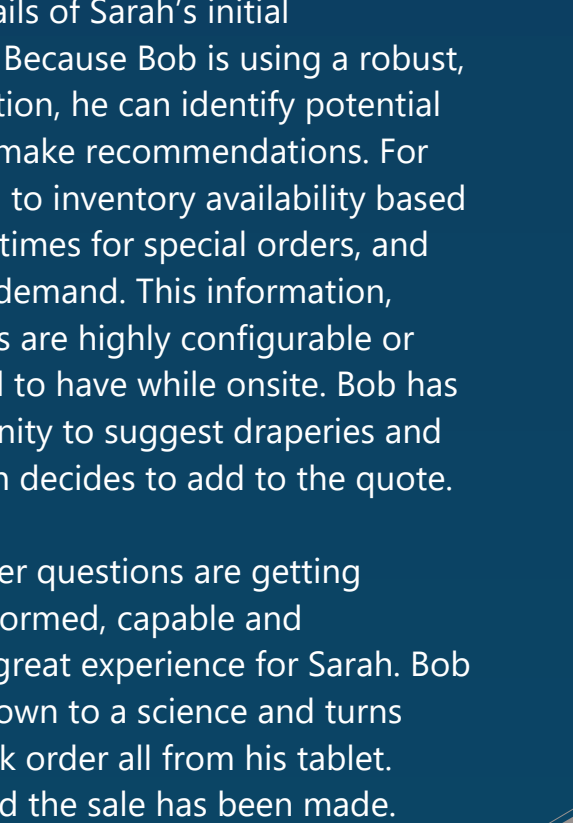


### 2 PM The Home Appointment



Bob arrives at Sarah's home armed with a tablet that has access to all the details of Sarah's initial conversation with Anne. Because Bob is using a robust, intelligent ordering solution, he can identify potential sales opportunities and make recommendations. For example, Bob has access to inventory availability based on Sarah's choices, lead times for special orders, and visibility into upcoming demand. This information, especially when products are highly configurable or made-to-order, is critical to have while onsite. Bob has also spotted an opportunity to suggest draperies and curtain rods, which Sarah decides to add to the quote.

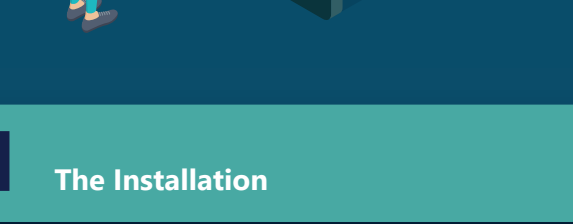
Sarah is impressed. All her questions are getting answered, and Bob is informed, capable and empowered to create a great experience for Sarah. Bob has the quote process down to a science and turns Sarah's quote into a work order all from his tablet. Sarah signs the order and the sale has been made.



### 8 AM Day of Installation

The installation process is critically important, because install experiences are often where customer service is prone to suffer. All the good sentiment Bob created during the smooth sales and ordering process can be destroyed by a disappointing install. In addition, the amount of difficulty a customer experiences during the installation process ties directly to the likelihood they will recommend Best Windows and Blinds to others.

Using map-based, GPS technology, Sarah is kept in the loop as Gene travels to her home, with estimated arrival time, and visibility into his location enroute. Sarah can see details about Gene, including his name and picture. Gene can be the days when service companies give a four-hour window for service and no intermediate updates. Gene can be the days when the customer is uneasy about an unidentified stranger coming to her home.



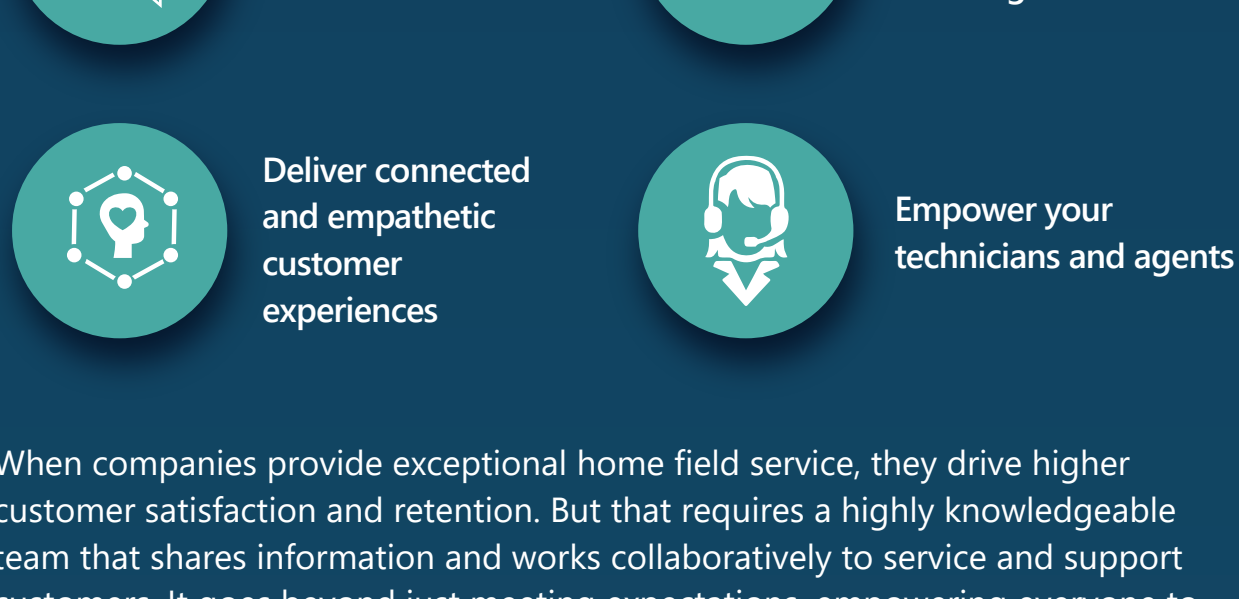
### 2 PM The Installation



When Gene arrives, he can see all the details of Sarah's order on his tablet. They review the goods and discuss the installation details. During the install, Sarah decides she would like to order another window covering. Gene uses his tablet to communicate her request to Bob, and Bob immediately checks availability and sees that the added window covering can be ordered and shipped by Friday. He calls Sarah and lets her know, long before Gene has completed the initial install. Sarah's happy again. Gene has been empowered to promote the sale, and just like Bob, he's serving as a brand ambassador for the company.

## Connected home services and sales — a better approach

Digital technologies, applications, and platforms can be a catalyst for service organizations, offering the tools to impress customers and provide a consistent brand experience. Technology has also empowered customers to discover and engage with brands in the way that is right for them. They expect ease and flexibility from every company they do business with.



When companies provide exceptional home field service, they drive higher customer satisfaction and retention. But that requires a highly knowledgeable team that shares information and works collaboratively to service and support customers. It goes beyond just meeting expectations, empowering everyone to do what's best for the customer using accurate data and automated processes. Collectively, these technologies can empower service teams to function as the trusted front line of the company.

*"Companies that prioritize and effectively manage customer experiences are 3x more likely than their peers to significantly exceed their top business goals."*

Source: Adobe/Econsultancy

Hitachi Solutions has the right combination of industry and technical expertise to help your company develop and execute a comprehensive home sales and service strategy. We've even created our own solution designed to enhance existing capabilities in **Dynamics 365 Field Service**, enabling both retail and professional firms to better serve clients in a home environment.

**Start your Connected Home Service transformation today!**

- Connect with a **Hitachi Solutions Service expert**
- Learn more about **Connected Home Services**
- Read about **Hitachi Solutions Extended Field Service solutions**
- Check out our **Microsoft Field Service Partner of the Year awards**