



## HANDLING OF ONSITE SERVICE REQUESTS PROCEDURE

### Background –

Requests to attend site for service, commissioning and warranty callouts can be some of the most complex to handle. The enquiry often comes with a frustrated customer and the advice received from the customer can at times be less than adequate and at times untruthful. That being said service work can be most rewarding financially and helps a technician grow and learn.

### Procedure –

- Remain positive to the request at all times. We want to solve the issue.
- Correct and detailed information is required and photos from site would be a bonus.
- Email an “authorisation to proceed” form to the customer partially filled in with their name and address plus any explanation of issue described. Ask the customer to choose a method and return the signed form together with any photos from site that may prepare the technician.
- If a customer wishes “warranty repairs only” and does not want to provide credit card details this is fine as long as they have signed consent. Schedule the call when you have a technician close by and the technician as a rule should do nothing other than report back.
- Where credit card details have been provided a “pre authorisation” is a good idea.
- Schedule the call ASAP and keep the customer informed.
- Technicians should test and inspect all possible areas of the installation before starting any work. Advise the customer of any faults discovered before starting work.
- Technicians should only make comment on site if 110% convinced of the issue. Otherwise collect information and product if required and do not feel afraid to tell the customer more testing is required.

### Notes –

- Above all keep the customers informed with positive feedback.
- Technicians do not guess or provide “maybe” answers. You do not know until further testing or referral. “It would be wrong of me to guess Mr Smith”.
- You can use the service desk as a third party referral. Tell the customer you are going to consult the service desk and copy them into the email.

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