

Creating the **Proactive Service**[®] Experience

Overview

The **Creating the Proactive Service**[®] Experience Workshop is a highly interactive workshop designed for business owners and managers who want to engage their field service teams more effectively in business development activities as a critical component of the overall service that they provide. Participants will be introduced to a process to define their own **Proactive Service**[®] experience and work through the strategy and steps to make it a reality in their own business. With the output from the workshop, each manager will be in a position to put this strategy to immediate effect.

Proactive Service[®] is an approach that engages field service teams in conversations with customers about what more they can do to help that customer achieve their business goals. Having conversations of this nature provides the highest level of customer service because it helps the customer appreciate opportunities to improve their operations in a way that they would not be able to on their own.

A strong, **Proactive Service**[®] approach by the field service team provides value for all stakeholders. For the service provider, it means higher revenues at higher margins through:

- Improved capitalization of additional work opportunities
- Expanded services within existing accounts
- Increased customer satisfaction and retention
- More associated project opportunities
- Improved employee attraction/satisfaction/retention
- A differentiated business strategy

For the field service professional, the **Proactive Service**[®] approach provides marketable skills that will allow them to have a greater degree of self-reliance and become a more appreciated member of the overall service team. It also means that the role can be more exciting and personally rewarding.

For the customer, they benefit more fully from the knowledge and expertise of the field service professional and are in a better position to take advantage of the latest in technology to help them achieve their own business objectives. There is also a certain assurance that comes with knowing that the service provider is proactively looking out on their behalf.

Creating the Proactive Service[®] Experience Workshop - Who Should Attend?

- Business owners and managers of field service organizations
 - People new to service management
- Anyone who is in a position to lead change in their service organizations

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Typical Workshop Content

Workshop Module	Content Summary	Training Impact	Anticipated Business Impact
Starting Point	<ul style="list-style-type: none"> Understanding that change begins with knowing where you are Completing a business assessment 	<ul style="list-style-type: none"> Participants have a process to implement the Proactive Service[®] initiative 	<ul style="list-style-type: none"> A starting point for business planning A baseline to measure performance against
Clarity	<ul style="list-style-type: none"> The importance of clarity of vision How clarity can engage stakeholders to rally around a common initiative 	<ul style="list-style-type: none"> Participants begin the process of creating a clear vision for their Proactive Service[®] approach 	<ul style="list-style-type: none"> Clarity provides the baseline for action Clarity provides the reference point from which to measure progress
Integration	<ul style="list-style-type: none"> Discussion of how the proactive actions of the field team can be integrated as part of the service provided 	<ul style="list-style-type: none"> Participants gain a unique understanding of their proactive role as a service Participants develop a plan to integrate the proactive efforts 	<ul style="list-style-type: none"> Recommendations become an integral part of the service provided Customers value the proactive approach and the recommendations
Knowledge and Skills	<ul style="list-style-type: none"> Identification of the critical areas of knowledge and skills to be addressed to ensure success 	<ul style="list-style-type: none"> Participants determine the knowledge and skill needs of their team in order to ensure their success 	<ul style="list-style-type: none"> Improved effectiveness of the field service team Increased revenues Higher levels of customer satisfaction and retention
Support	<ul style="list-style-type: none"> Understanding the critical role management plays in the success of the field team and the actions management can take to support and encourage their teams 	<ul style="list-style-type: none"> Participants determine the actions they will take to support the field service team 	<ul style="list-style-type: none"> Field teams are engaged and enthusiastic about their role Continuous improvement adds to competitive advantage