

A Note to the Reader

Welcome to the *Beyond GREAT SERVICE Planning Guide*. If you have picked up this workbook and planning guide, then you are aware of the exceptional opportunity to increase revenues and market share by providing a unique, valued, and often overlooked service for your customers. You understand that you can gain a sustainable competitive advantage in a service world that is largely undifferentiated. You know that you can create a working environment that will attract the brightest and the best field service providers.

This *Planning Guide* has been designed as a step-by-step tool to help you create a field service team made up of individuals who are enthusiastic about helping your customers to be better off for having hired you. This guide is not about teaching your technicians to “sell,” but rather it’s about the important responsibility that field-based personnel have to identify and bring forward opportunities for their customers to make improvements.

This book is divided into six sections and each one addresses an aspect of the planning, implementing, and coaching process. At the end of this guide, I have included a pullout Planning Summary Form (Appendix D) so that you can summarize your actions on a document and post for easy reference.

Although this companion workbook has been created as a stand-alone tool, you will benefit from reading my first book, *Beyond GREAT SERVICE, The Technician’s Role in Proactive Business Growth*. This book is based on my years of experience as a front line manager and as a consultant to service organizations. *Beyond GREAT SERVICE* is written as a fictional account of the implementation of the Beyond GREAT SERVICE approach. The story follows the activities of Charlie, a service manager, as he discovers the secret of successfully engaging technicians in conversations with their customers, increasing revenue while building upon customer satisfaction and improved contract retention. In the book, I showcase the planning steps taken by Charlie which I hope will be a helpful guide and reference for you as you go through a similar planning process with your team.

Ideally, I recommend that you read *Beyond GREAT SERVICE* in its entirety before completing the exercises in this *Planning Guide*. This will give you some insight into the task and hopefully spark your imagination of what truly is possible. Throughout, I will refer back to relevant sections in *Beyond GREAT SERVICE* that are most applicable to the specific area of discussion.

Here, in the *Beyond GREAT SERVICE Planning Guide*, I have used the term *field service technician*. You may use terms such as *field engineer*, *field service electrician*, *field mechanic*, etc. The term *field service technician* is intended as a generic term to cover all of those roles. It applies to any individual that provides maintenance and service to equipment and systems in the field.

As you complete your planning and implementation of the Beyond GREAT SERVICE approach, I hope you will keep in touch with me. I would love to hear how your business has changed and benefited your customers, employees, and other stakeholders. And, if you need some help or guidance, I am only an email or telephone call away.

Jim Baston
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