

Laser-Level Your Strategy

How to stay focused while juggling the moving pieces of your business

From booking and managing appointments to dispatching the right technicians, growing a service business requires coordination and determination.

Check out these practical tips for developing your short and long-term strategies for success.



Define Your Unique Value Proposition (UVP)

Identify what sets your field service business apart from the competition. Clarifying this helps you focus your marketing efforts and target the right customers.



Become More Customer-Centric

Prioritize the needs and preferences of your customers because you rely on their satisfaction to drive repeat business and positive word-of-mouth.



Technology is Your Friend

Invest in technology that streamlines operations and improves efficiency. It's worth the learning curve when you start seeing more work being done with fewer resources.



Lending a Hand Goes a Long Way

Partner and collaborate with other local businesses. Help them out when you can offer products or services, and they'll have your back when you need it too.



Commit to Ongoing Improvement

Encourage your team to seek out new ways to improve processes, increase efficiency and deliver better service to customers.

LET'S GET TO WORK

Sometimes those high-level objectives are difficult to turn into actionable tasks—we've got you covered. Use this worksheet to help you bring each of your goals and strategies into action.

Goal: _____

Strategy: _____

ACTION 1

How do you want your customers and prospects to view your business?

Person Responsible: Who is responsible for carrying out each action step?

Resources Needed: What resources you need (both internally and externally) to complete each step?

Progress Indicated at Benchmark: How you know that you've made progress on the action step?

Due Date: When you expect to complete the action step.

Evidence of Improvement: The results of completing the action step

ACTION 2

How do you want your customers and prospects to view your business?

Person Responsible: Who is responsible for carrying out each action step?

Resources Needed: What resources you need (both internally and externally) to complete each step?

Progress Indicated at Benchmark: How you know that you've made progress on the action step?

Due Date: When you expect to complete the action step.

Evidence of Improvement: The results of completing the action step.

ACTION 3

How do you want your customers and prospects to view your business?

Person Responsible: Who is responsible for carrying out each action step?

Resources Needed: What resources you need (both internally and externally) to complete each step?

Progress Indicated at Benchmark: How you know that you've made progress on the action step?

Due Date: When you expect to complete the action step.

Evidence of Improvement: The results of completing the action step.

What's Your Value Proposition?

What are the specific areas that attract your customers and have them coming back for more?

Fill in the blanks here to help you understand how you can help various target customers. It may be helpful to fill this in for many scenarios of customers and services.

FOR Your target customer	
WHO State what they need and your opportunity to provide	
OUR Product/service name	
IS Product/service category	
THAT How will this service(s) benefit them	



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