

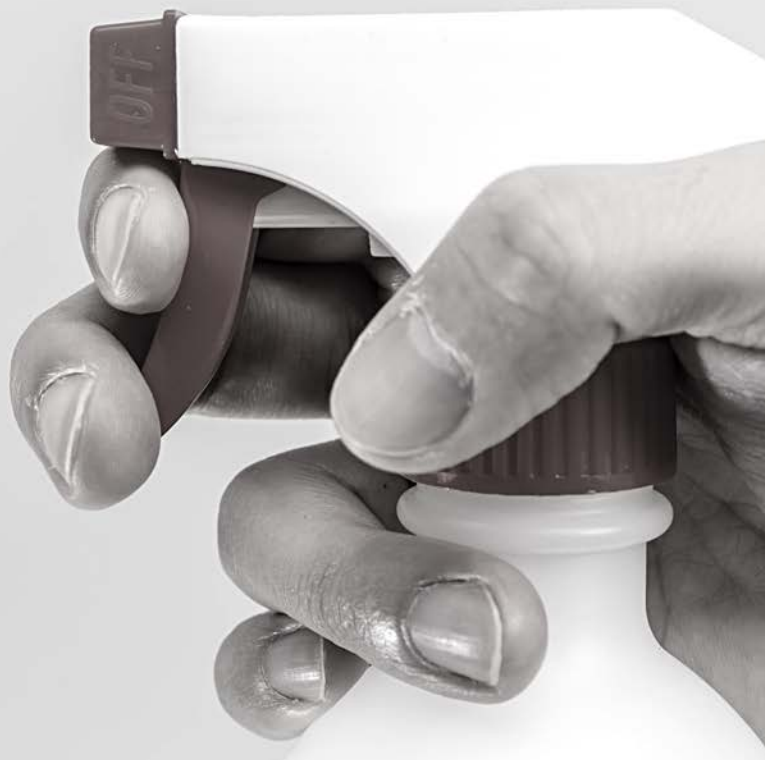
TECHNICIAN IN-HOME SAFETY COMPLIANCE



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Presented to
CSIA/NCSG April 2020

NEW ERA, NEW WAY.



Recent events and customer concerns have added one more way that your company can either impress and win a customer or blow it big-time.

You're likely telling customers on your website and on the phone that you're following new health and safety guidelines to keep everyone safer during all in-home appointments. That's good! But if your technicians aren't complying with the new procedures you're telling people you follow, **you may end up with nasty negative reviews** that could harm you for a long time to come (not to mention legal liabilities and forced closures in some areas).

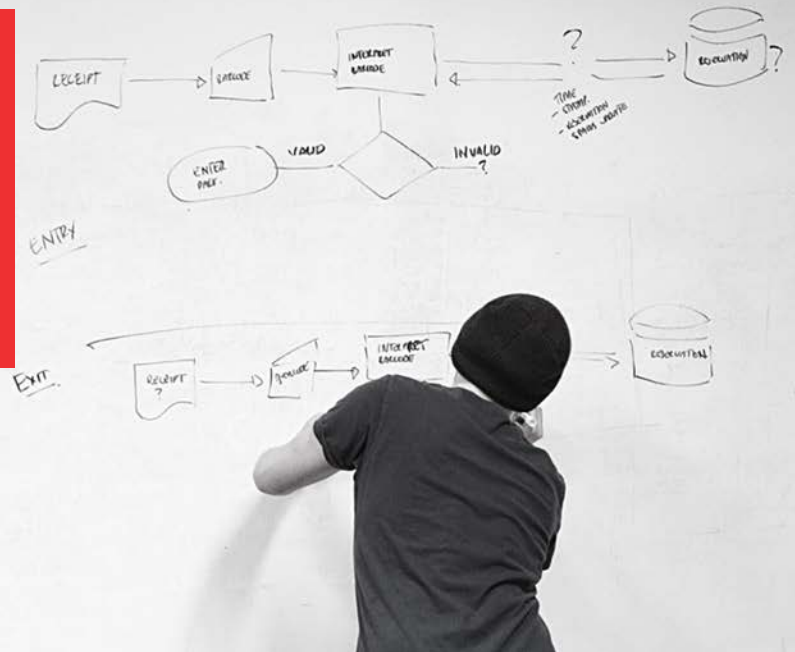
The following **three-part strategy** (do-doing-done) outlines a *communication and verification procedure* that will help business owners manage compliance in the field, and promote the kind of customer goodwill that will win you even more business - at a time when everyone can use all the business they can get.

WORKS WITH:

- any sanitation protocol you adopt
- existing, free, or low-cost tools
- minimal time added

Don't leave such an important detail to chance. Use this strategy to enforce compliance for as long as it takes to help habitualize the new protocols in the field.

ONE: EXPLAIN WHAT YOU WILL DO.



Employee Communication

- **Create an explicit, step-by-step procedure.** Don't assume employees know what to do, how to do it, or why it is so important. If you are going to hold them accountable, take the time to make the directions clear.
- **Make sure each employee is trained on the procedure.** Go through it with them to verify your expectations are being met.
- **Define incentives and consequences.** Leave nothing vague here. Your business and its reputation are on the line, and your technicians are your front line of defense. Failure to comply should not be an option.

Customer Communication

- **Tell your customers.** Do not assume your existing or potential customers know what you are doing to keep them safe. You must tell them everywhere they need to see the message: in marketing emails, on your website, in ads, on your trucks, during the initial booking call, and in pre-appointment emails and reminder texts.
- **Tell them you expect their feedback at the end.** Even before the appointment is booked, a customer must know that the appointment will not be complete until they have provided confirmation and feedback. Tell them how this will happen (email, text, phone call, web form).

TWO: VERIFY IT IS BEING DONE.



Simple Visual Verification

- **Take a selfie in required PPE.** Use a mobile device with camera to snap a selfie showing face wearing mask next to a gloved hand. Should be done using either Field Management Software that geotags and date-stamps the image before saving it with the customer record (many do this, check yours), OR using a free geo-stamping photo app already installed on the device for this purpose.
- **Save or send the image.** If you can save the image to the customer record from the field, do that. Otherwise, the technician quickly texts it to office staff for visual verification and the office staff adds it to the customer file.

Geo-Tagged Photo Apps

Here are two free apps that keep location data and date/time data on the photo itself for foolproof verification.

For iOS:

GPS Camera 55



For Android:

GPS Camera



THREE: CONFIRM IT WAS DONE RIGHT.



Did tech
wear PPE
always?

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Simple Customer Confirmation

- **Send a survey to the customer.** After the appointment is the perfect time to send a "Satisfaction Survey." You might already do this. If so, add one more question to it now:

"Did the technician(s) always wear gloves and a mask and follow safety protocols to your satisfaction?"

- **Ask for a review!** Follow up with an option to leave you a review on Google, Facebook, or Yelp.
- **Save the survey response.** Keep each response with the customer record in your system if you can, or keep an office file with the responses you get.
- **Deal with negative responses.** Discuss customer-observed non-compliance issues with the offending tech. If they have a visual verification photo, ask what might have caused them to report noncompliance. Follow-through on any disciplinary policy you put in place.

FREE Survey Software

Need to put together a Customer Satisfaction Survey? No problem. Check out the FREE option at Survey Planet.



Survey from your site

Rather use your own web site? Ask your marketing company to help you create the perfect Customer Satisfaction Survey. Then you can send the survey page link to every customer after their appointment.



**ONE:
EXPLAIN WHAT
YOU WILL DO.**



**TWO:
VERIFY IT IS
BEING DONE.**

**THREE:
CONFIRM IT
WAS DONE RIGHT.**

STRATEGY CHECKLIST:

- Provide employees with clear sanitation procedures and an expectation that they will be followed in the field.
- Explain how you will be verifying and confirming compliance with the new procedures.
- Explain any incentives for compliance, or consequences of noncompliance.
- Communicate with customers what to expect from your technicians while in their home.
- Set the expectation that you will be following up post-appointment.
- Employee arrives at job location and takes selfie with mask and gloves before entering home.
- Employee stores or attaches photo to job file or texts to office for verification record.
- Appointment is conducted and completed. Employee leaves.
- After the appointment, you or office staff contacts customer (via phone, email, or text) as part of a routine "Customer Satisfaction Survey." In addition to questions about service satisfaction, the customer is asked if the technician met their expectations for wearing proper PPE during the entire service call.
- Customer answers are recorded as part of employee compliance record, which creates a paper trail in case of any liability or regulation noncompliance claims.