

How to turn your field engineers from stagehands into actors

Everybody loves field engineers. We might not always know that we love them, but we do. These are the people who maintain and fix the systems and machines we rely on for basically everything. Without them, the world would grind to a halt.

But the role of the field engineer has changed. They used to be stagehands, working tirelessly behind the scenes to make sure all the lighting, scenery, props and effects were set up for the show. Now they're being asked to join the actors on stage and become part of the show itself.

Why? Because field services have changed. They've evolved from cost centres to profit centres and more and more companies want their engineers to be at the forefront of this shift—largely because of their proximity to, and experience dealing with, the customers. While fixing downed equipment is obviously a vital part of their role (and will remain so), field engineers are in a position to do so much more.

So, engineers are now being asked to be salespeople and customer service representatives as well as fixers. Service is where the money is and companies want their engineers to step up and play a part in that. Still, coming from backstage to centre stage is out of many engineers' comfort zones and requires a different skill set.

Here are four suggestions for helping your engineers go beyond their traditional fixing role and become brand ambassadors for your business.

1. Make sure they know their worth

You first need to challenge your engineers' assumptions about what their role is. Many engineers still think that the customers' interactions with the sales and customer service

teams are more important than the customers' interactions with them. They continue to view themselves as the stagehands, serving a purely technical function.

In reality, engineers are often further down the line in terms of building and strengthening the customer relationship than the sales and customer service teams. They're on the front lines every day, meeting the customers face to face. Salespeople and customer service representatives aren't. They might be the ones traditionally charged with dealing with customers, but it's the engineer who is central to the experience the customer has with your brand.

This fact needs hammering home above all else. Engineers' interactions with a customer have a massive bearing on how that customer feels about your brand after a problem is resolved. At the point when the engineer is on-site dealing with an issue, he or she is the most trusted person in the company. Engineers need to know that they're not just there to fix things and get out.

2. Train them

The clip below is a great example of field engineers acting as salespeople.

<https://www.youtube.com/watch?v=CGiH5HR8W38>

Here we have three field service techs—in this case, ghost catchers—who cross-sell two further services on top of the actual entrapment of the ghost: proton charging and storage. These are services that the customer needs and, by being savvy to the customer's interests and heedful of potential new sales, the ghostbusters have successfully added to their revenue. (Skip the strong-arming demonstrated here by Ray, though. We're sure your customers won't take kindly to engineers who threaten to break their equipment again till they've paid.)

More and more companies want their engineers to be upselling and cross-selling their products and services: new appliances, upgraded equipment, service contracts etc. But not all engineers are natural salespeople like the ghostbusters and you need to invest in sales training if you want to change that.

Of course, learning how to make sales is one thing. Learning how to be comfortable making sales is another. Sometimes the latter is the bigger challenge for engineers who have never imagined themselves in a sales role.

So, as part of their training, teach your engineers to think LOTS, i.e. the "Listen, Observe, Think, Speak" approach. This will enable them to do three things. 1. Hone their customer service skills. 2. Identify sales opportunities. 3. Reframe the actual selling as a way of helping the customer get the most out of their equipment, making it less uncomfortable to engineers who aren't used to it.

Before fixing a piece of downed equipment, your engineer should seek to understand, through listening, how the customer has been impacted by missed orders, production backlogs, overtime costs and other problems. Listening, however, is just the point of entry. Observing is also key to understanding the customer's problem. It involves observing the customer, the situation, the way the problem is impacting the workforce, and the machine itself, in order to get a more complete picture of what's going on.

Finding out more about their struggles through listening and observing could lead your engineers to think of solutions that go beyond a simple repair. By thinking more broadly about the customer's issues and needs, engineers are able to recommend upgrades, replacements and recurring maintenance contracts. Sometimes a different contract or piece of equipment is what's best for the customer in the longer term.

The thinking stage is not just about contemplating sales opportunities, though. Engineers also need to think about customer service issues and queries that have been raised, and deal with any awkward or confrontational customer situations in an appropriate manner. There could, for instance, be a problem fixing the equipment or getting a part. The engineer could've arrived late on site for some reason. Perhaps your customer hasn't realised that their warranty has expired. All these situations require careful thought before the engineer addresses them.

Then, when the time comes to do the talking, mastering all of the above should put your engineer in an excellent position to assure, accommodate and satisfy the customer.

3. Incentivise them

Some engineers will need more than training to really buy in to the concept of being salespeople. Some will take the attitude that sales is someone else's job. They've been working quietly backstage for years and don't see any value for them in coming out from behind the curtain.

So, give them value. Many companies are proactively incentivising their engineers to upsell or cross-sell directly, or at least take note of possible leads and bring them to the sales team. You could, for example, offer a bonus or commission to engineers who sell products or sign customers up for new service plans.

And while cash works, some companies are finding that non-cash goodies work even better. Consider offering a day off, a group trip for top performers, dinner packages and new tech devices.

4. Make sure they're supported by the right technology

Your engineers' ability to be sales and customer service champs is not just served by their own compassion and competence. It's also served by having the right technology at their disposal.

Engineers need fit-for-purpose mobile devices through which they can access information about the customer, the contract and the job at hand. They also need to be able to view a detailed history of the equipment they've been sent to repair. Not furnishing engineers with this data renders them incapable of fully understanding the customer's situation, making it difficult to identify solutions or give informed advice.

Eliminating paper and phone calls from field-based workflows is also key. Enabling engineers to receive, complete and sign off jobs using just their mobile devices improves the speed and quality of their work, strengthening customer satisfaction by getting their machines back up and running quicker. It also puts the engineer on stronger ground in the event of a sales opportunity. A happier customer is naturally more willing to buy something new.

Asolvi offers field service management software that empowers engineers to be the brand ambassadors you want them to be. It does this by giving them instant remote access to all necessary information about customers, contracts, equipment, sites and parts. This enables them to undertake a full assessment of the customer's needs, deal more effectively with customer queries, and recommend solutions that might be more effective than a simple fix. Our software also streamlines other tasks traditionally done using paper, emails and phone calls. This includes checking parts availability and price, raising parts requests, writing service reports, attaching photos and documents to service reports, sending said reports directly to customers, and obtaining customer signatures.

To find out more about how our software can help you bring your field engineers to the fore and make them into sales and customer service pros, contact sales@asolvi.com or [request a demo](#).