Step by Step to Service Dispatching Procedures

Dispatching is a critical function in a peak performing service department due to the importance of matching desirable skill sets of technicians with the type of call they face. The dispatch function needs to be orderly and react with urgency!

Dispatching procedures may not be glamorous, but they are critically important to the overall success of a service business.

Many companies ignore the dispatching procedures in their company until they need to replace an employee who has left, or has a job change. At that point, it becomes more of a crisis as opposed to an orderly transition, and who suffers the most – the Technicians in the field.

Dispatching is about organized chaos that culminates in great service! “EXCEPTIONAL WOW” Service.

It is about placing the proper technical capability with the work available. This has the effect of making the work get performed right the first time more often than if we are mismatching our skills with the work performed.

The dispatching function must not only be organized, it must be able to identify when the work cannot be accomplished and juggle the schedules accordingly.

Here are some basics a dispatching function deals with each day:

1. Proper telephone courtesy and manners – Propriety.
2. Company telephone system capabilities – Handling call volumes.
3. Proper on-hold technology – No radio stations!
4. Knowing the technician personality and work capability and habits.
5. Earning the respect of the technicians so there is trust.
6. Knowing how to qualify the service call, and determine proper information to present to the service technician.
7. Understanding how the dispatching function should operate when it is performing properly.
8. Having technician skills spreadsheet or description of who can do what type of work.
9. Being able to handle a difficult and challenging technician.
10. Being able to talk to homeowners and customers.
11. Conducting a service debrief after the service call.
12. Conducting a happy call with a homeowner.
There are many other functions, but you can see, this role requires a personality that can deal with the technicians, and their needs, as well as their challenges. The dispatcher also must deal well with internal office personnel, and on occasion homeowners.

Have organized dispatching procedures so the processes flow smoothly no matter who’s dispatching.

**Knowing the fundamentals of dispatching is the start of accountability:**

**Step 1**  Have procedures written down for the dispatcher. (See flowchart)

**Step 2**  Have a detailed work and skills capability spread sheet for use by dispatcher for assigning technicians to the job and knowing who is capable of doing what kind of work. This can be commercial work, the various types of commercial work, residential work, precision tune-ups, or residential service.

**Step 3**  Have a visual board (SOFTWARE) for tracking the calls, the Service Agreements, Tune-ups, and where the technicians are in the filed on those calls. Having the dispatch board is crucial to knowing what next available technician may look like allowing for early decision making by the dispatcher.

**Step 4**  There must be a debriefing system for technicians to account for each demand service call with these items at minimum being determined:

- Lead Opportunity
- Lead Disposition
- Service Agreement offered and disposition
- Ticket value, method of payment
- Invoice #, Amount, Parts, Labor, Costs, Inventory Relieved

This is only a partial debriefing list – Set-up your company process.

**Step 5**  Capture labor hours for each service call, for labor tracking report. Labor as a percent of sales report for service work performed comes from the debrief with the dispatcher and the accounting of the service call. Today, we can do most of the capture electronically and with technology, but if not facilitate this manually.
Service Dispatching Procedure Chart

1. Call arrives at dispatch, customer greeted professionally.
2. Call diagnosis over phone – Collect customer data.
3. Dispatch assigns a work order to the call – Computer.
4. Dispatch assigns the work order to the open board.

When available technician comes available, skills are checked for work required.

5. Closest geographically available technician is assigned the call.
6. Technician is given the one call, requested to complete the work.
7. Dispatch debriefs homeowner on previous call.

When available technician comes available, skills are checked for work required.

8. Technician performs diagnostic & work.
9. Technician calls into dispatch and defines invoice.
10. Service Complete

When available technician comes available, skills are checked for work required.

11. Lead or Install
12. Install the Accessory Now

When available technician comes available, skills are checked for work required.

13. Debrief takes place – Debrief form or computer, plus accounting input during debrief.

When available technician comes available, skills are checked for work required.

14. Lead & opportunity report is completed, lead assigned.
15. Technician is given next call and cycle repeats.
16. Paperwork & time cards turned in and validated.
How do we implement a proper dispatching system?

1. Develop a service department plan – that includes involvement from your dispatcher.

2. Define your company dispatching procedures in writing as a memo, or flowchart for your dispatcher and your technicians.

3. Train – Train and train some more on phone etiquette and propriety – Manners. Train the CSR and dispatcher on WOW Customer Experience moments.

4. Train the technicians in a service training session on the proper dispatch procedures including the perfect service call.

5. Test and assess your technicians for skills and work type capabilities. This includes not just technical capabilities but also personalities and social styles.

6. Train your entire teams on social styles – How to get along with varying people – and build a cohesive team and unit on the vision-mission-purpose.

7. Create a visual tracking board or computer board for managing the calls and the technicians.

8. Create a debriefing form for your company and use it post call.

9. Debrief the technicians after each call.

10. Dispatch one call at a time based on skill, then on geographic proximity.

Why is this critical to your success?

- Proper dispatching procedures will insure better efficiency in your service department.

- A well-organized dispatching system will allow improved technician productivity and accountability through systematic matching of skills with work required.

- **Proper dispatching procedures will improve your company profits!**