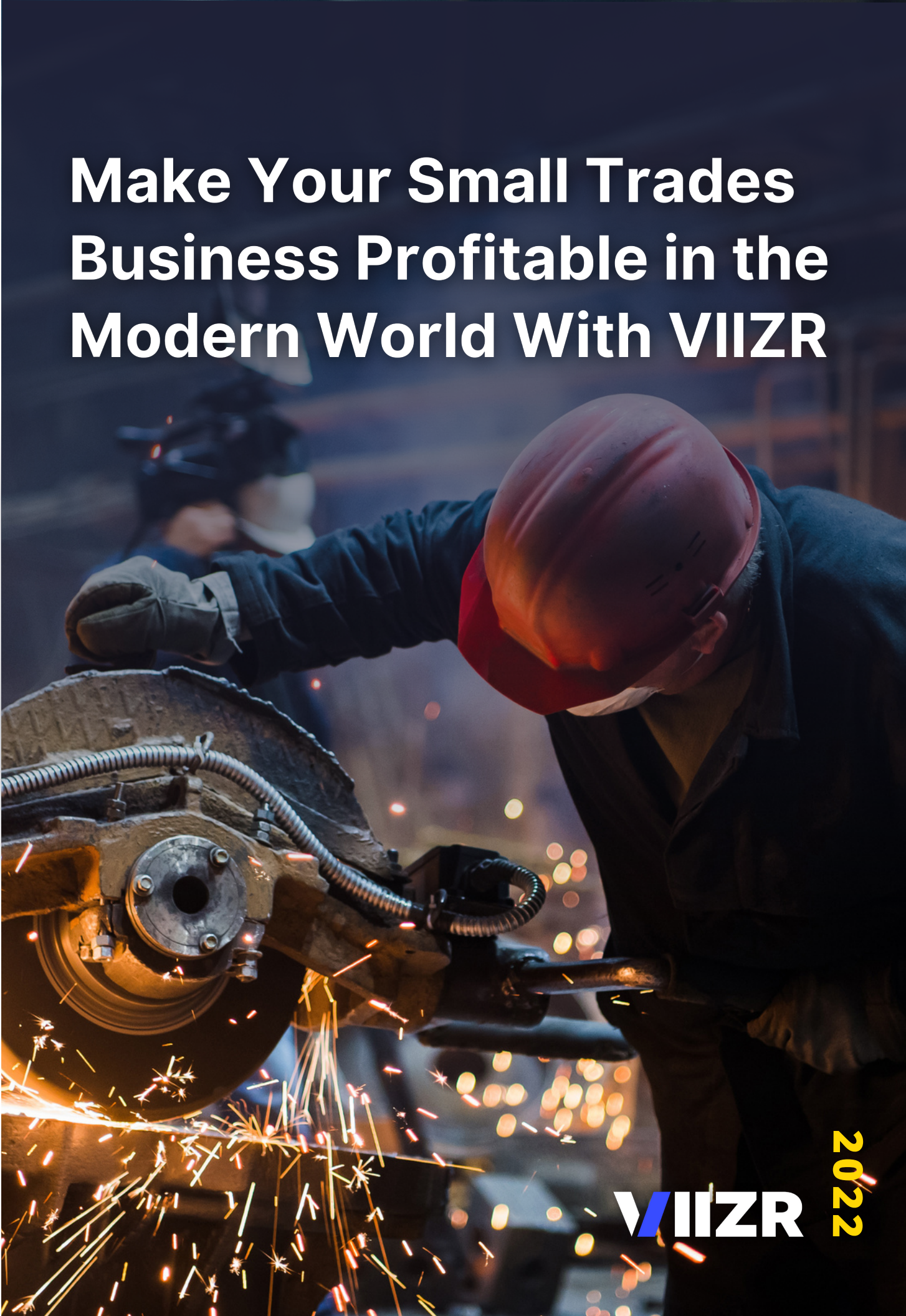


Make Your Small Trades Business Profitable in the Modern World With VIIZR

FIELD SERVICE MANAGEMENT SOFTWARE

POWERED BY FORD | BUILT ON SALESFORCE



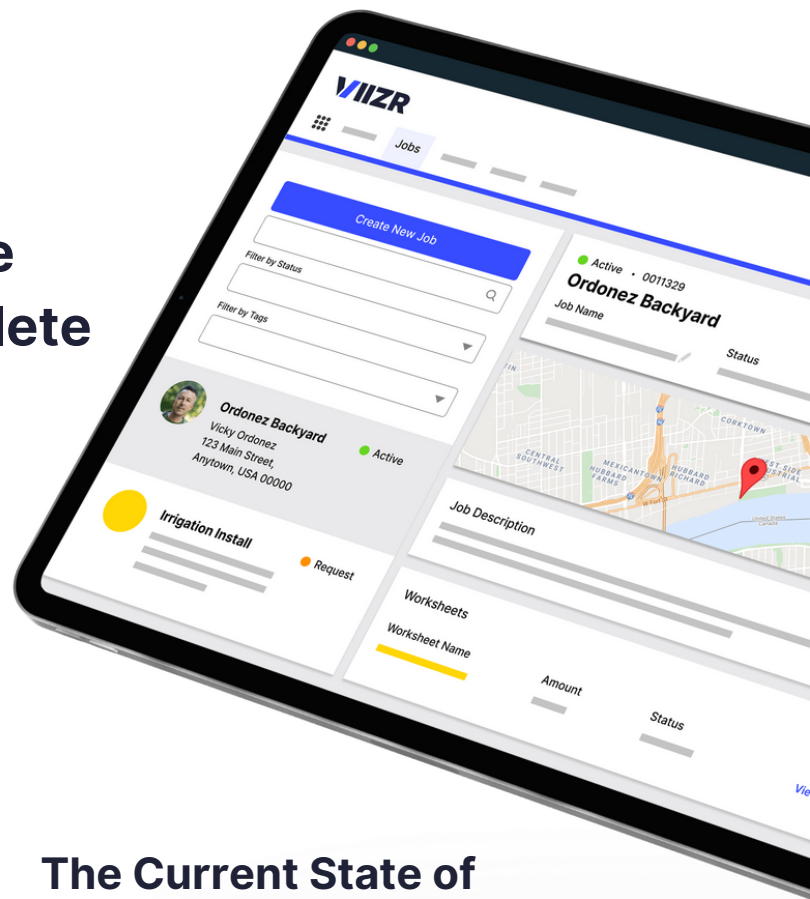
VIIZR 2022

Run All Operations More Efficiently With a Complete Digital Toolset

Most software in the field service space targets larger organizations with IT teams and experience with enterprise software, rather than small businesses. Today, nearly every sector benefits from advancements in technology, and customer expectations are changing because of that. However, many of those in the service industry haven't been able to catch up with the times.

Millions of small businesses in the trades that are looking for ways to improve the employee and customer experience are stuck with paper invoices and customer records. They don't have the modern tools to manage all of their employees and provide on-site job support, even though they could benefit greatly from it.

Organizations with field service workers also deal with high volumes of service requests and volatile schedules. Urgent issues arise like customers calling to reschedule, customers not being there when field service personnel arrive, and last-minute changes to the job, just to name a few. All of this pressure compounds when employees don't have the information they need to communicate well and do their jobs effectively.



The Current State of Small Trades Businesses

Small business owners in the service space shouldn't have to struggle to keep their businesses afloat, but the amount of time they have to spend on manual tasks is holding them back. Plus, this has an impact on everyone who works in the organization from the field to the back office.

Stuck in the Past

For many business owners, paper and manual processes are nothing new. They've been at the core of the business since the start. The problem? When business grows and the demands on field operations increase, this way of doing things is no longer efficient and it's not scalable.

Issues at the Office

Back office employees play a key role in keeping everything running smoothly, but they often don't have the tools and systems they need to maximize their productivity. Manual processes lead to data submission delays and quality clean-up issues. Human error also increases the time spent on reentering and fixing data.

Data Bottlenecks

Frequent delays in field workers getting the information they need when they're out on a job limits capacity. Worse, the time spent on trying to find or share information goes to waste when the worker could be completing tasks that translate to revenue, like ensuring that quotas are met and helping customers.

How Ineffective Field Service Management Impacts Small Businesses

The challenges of operating in the trades as a small business are no secret, but data from the Small Trades Business Survey conducted by Escalent reveals the truth about how they can stand in the way of success. Most people don't believe their customer relationship management (CRM) or field service management (FSM) activities are efficient, and they're struggling to keep up every day.

Managing CRM and FSM

Over 90% of survey respondents handle CRM/FSM activities themselves and over 90% keep track manually. Without any way to streamline these activities, entering and organizing large volumes of data is a challenge.

Spending Too Much Time on Clerical Work

When companies start out, paperwork may not be a task that's top of mind, but as the business grows, so does the workload. Survey respondents estimate that 18% of their businesses' time is spent on clerical tasks and documents. That's nearly the equivalent of one day every workweek.



Lacking a 360-Degree View

54% of respondents agree with the statement that one clear view of the status of all active jobs would make their life easier. However, having that view is nearly impossible when all business systems are disconnected.

What if you could eliminate manual, inefficient, and repetitive processes? How would it change your business if you could get up-to-the-minute information in your back office and the field?

Benefits of a Modern Field Service Management Solution

Choosing an advanced field service management solution doesn't just bring your organization up to speed with big businesses. Implementing this type of software can help you bring new opportunities for improvement and business growth to the surface.

Increase Efficiency and Your Bottom Line

In a world where everything is one click or tap away, you need to respond to inquiries quickly to avoid missing out on work. However, organizations that still use outdated field services management processes aren't always quick to respond, which impacts revenue. Businesses know this, as 42% of survey respondents agree that their business could increase the number of jobs they book if they were able to respond to customers faster.

Gain Visibility

Get real-time insight into what's happening in your business every day. Field service management software will give you all the information you need about each job at a glance. You don't ever have to struggle to know the status of work being done, and you'll have a better understanding of areas for improvement.

Meet Customer Expectations

A customer is four times more likely to buy from a competitor if the problem is service-related rather than price or product-related, according to data from Bain & Company. Having a reliable software solution in place promotes customer satisfaction and the operational efficiency you need to build a great reputation.

Filter		Today		2 Days		
Appointment	Status	6 AM	7 AM	8 AM	9 AM	10 AM
0011329	Scheduled	Aaron Clark Contractor		Installation	Estimate	
0011629	In Progress	John Elliot Contractor		Repair		
0067329	Dispatched	Rosa Garcia Contractor		Service Call		
0018929	Completed	Kim Dudek Contractor			Maintenance	

Customer satisfaction increases when companies achieve faster fix rates and better service.

The right technology can empower field service companies to deliver the level of service that customers want while streamlining staff's day-to-day work. Organizational efficiency increases with the elimination of manual processes and improved technician utilization. Meanwhile, customers get an experience that's similar to what they've become accustomed to during interactions across all other industries.

How Ford Is Bringing a Solution for These Problems to Market

The team at Ford saw a gap in the trades space and wanted to level the playing field for small businesses. To do that, it was necessary to build an all-in-one solution that would enable business owners to meet the demand they're facing, without adding complexity.

What Is VIIZR™?

VIIZR™: The Trades CRM for Small Business is an easy-to-use field service management software. It helps you manage your home service business in a way that works for you. VIIZR™ is customizable for your unique processes, so you can be confident it will fit into your operations.

This was co-designed with small businesses in the trades to ensure that the solution meets all of your needs. It's a complete toolset you can trust to help you get more jobs done and keep your customers happy.

Powered by Ford, Built on Salesforce

Innovation and efficiency come together as Ford, the manufacturer of the best-selling pickup truck for the past 44 years, and the global CRM leader, Salesforce contribute to this solution. VIIZR™ combines Ford's commercial vehicle business, Ford Pro, and Salesforce Field Service to address key pain points for small business tradespeople, including invoicing, scheduling, and managing requests, making it simple to deliver better service.



When developing this solution, doing so on a powerful and progressive platform that Fortune 500 companies (including Ford) are currently customers of was the clear choice. Now, small business owners in the trades have a platform that will empower them to spend more time on growing their business while improving the quality of life for customers, employees, and themselves.

Why **VIIZR™**?

Your time is limited. You need to focus on winning new jobs, delivering high-quality work, and expanding the business—not tedious tasks. VIIZR™ provides affordable, advanced field service tools which enable trades to:

✓ **Track Everything With Ease**

Streamline all processes in a single platform including quotes, work orders, invoicing, and job management.

✓ **Keep Customers Happy**

Manage customer relationships and jobs through an all-in-one customer profile, making it easy to communicate with them and improve the overall experience.

✓ **Upgrade Operations**

Take the stress out of scheduling, dispatching, and coordination of field technicians for greater efficiency and a more profitable business.

Every Tool You Need in One Place

Our intuitive software makes it easy to complete all the tasks that keep your business going. Here's a closer look at what we offer to improve your operations and transform your processes:



Job Management

Keeping an eye on multiple jobs isn't easy when you're struggling with manual processes and paperwork. Say goodbye to frustration and delays between the back office, employees, and customers. Store all information in VIIZR™ so key details never fall through the cracks.



Work Orders

Manage and monitor work orders from creation to execution. Technicians can edit the status, notes, and price of their current jobs as requirements change.

Plus, you get full visibility into all updates, so everyone in your organization is always in the loop.

Client Data Management

Improve the quality of your service by making it easier to engage with your company. Stay connected with every customer from anywhere and keep them informed about the progress of each job.

Creating & Sending Estimates

Eliminate the time-consuming aspects of the quoting process by quickly sending professional PDF estimates, complete with photos. Start jobs faster than ever before by providing customers with everything they need to give the job a green light.

Scheduling & Dispatching

See job status and tech locations at a glance and increase the efficiency of your field service team with our drag-and-drop schedule tool. Techs can view their schedule from anywhere, organized by day, week, or month.

Invoicing & Payments

Speed up the billing process by creating, emailing, and saving paperless invoices with just a few clicks. Cut down the time you spend waiting for payment by making sure nothing gets lost or forgotten.

Maps & Routing

Speed up the billing process by creating, emailing, and saving paperless invoices with just a few clicks. Cut down the time you spend waiting for payment by making sure nothing gets lost or forgotten.

Project Management

Design the workflow that fits your business, get a birds-eye view into what's happening at any given time, and communicate with your employees in the field to keep every job running smoothly.

User Permissions

You're in control of what users have access to, so you can keep the focus on what your people need to do a great job.



Digitize Your Operations and See the Savings

Real-time job scheduling saves time and fuel. Digital invoicing saves paper and ink. A more efficiently run business saves money. Using VIIZR™ from Ford, an office manager or business owner can handle all these functions from their computer in just a few clicks. When changes are made, technicians can see them when they're ready—instead of being interrupted in the field.

**Focus Less on Back-End Processes.
Spend More Time on Your Service.**

Test drive **VIIZR™**