BOOKED UP, BUSY, AND BILLABLE:

5 Strategies to Maximize Technician Utilization

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Introduction

For any technology solution provider (TSP), capturing billable hours can be arduous and daunting – but it doesn't have to be. It's critical to keep your techs as billable as possible. The standard industry goal is to keep techs at least 80% billable. If they're not at 80%, you're sacrificing profitability by not utilizing your resources efficiently enough.

Your techs' productivity levels are a major contributing factor, but they're not the only things poking holes in your revenue stream. Consider your billing and invoicing structure. Are invoices being sent out consistently (and on time), and are payments being received within the requested payment time frame?

The key to business success is streamlining these processes to make sure your techs are booked up and busy which results in billable time. Utilizing these 5 time-tested best practice steps makes your business more efficient, and allows for greater productivity because your service manager has visibility into what the techs are doing. Your techs in the field are held accountable, which positively reflects your bottom line.

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1 Streamline the Morning Routine

Time is money, and the morning commute could be costing you a fortune. When your techs drive to the office first (before any client stops), they have ample opportunity to waste time. This unbillable time slowly accumulates throughout the week which could equate several hours by the end of the month.

The best way to eliminate wasted time in the morning is to have techs drive directly to the client, if an on-site visit is required. If the work day starts at 8 AM, techs should arrive at the client's office at 8 AM. With mobile devices, techs have all the information they need on-hand, such as the issue, client configurations, contact information, and more. This eliminates any need to drive into the office first thing in the morning.

"At an average of 26 minutes each way to work, five days a week, 50 weeks a year, that works out to something like a total of 1.8 trillion minutes Americans spent commuting in 2014…With that amount of time, we could have built nearly 300 Wikipedias, or built the Great Pyramid of Giza 26 times -- all in 2014 alone."

– Christopher Ingraham, The Washington Post

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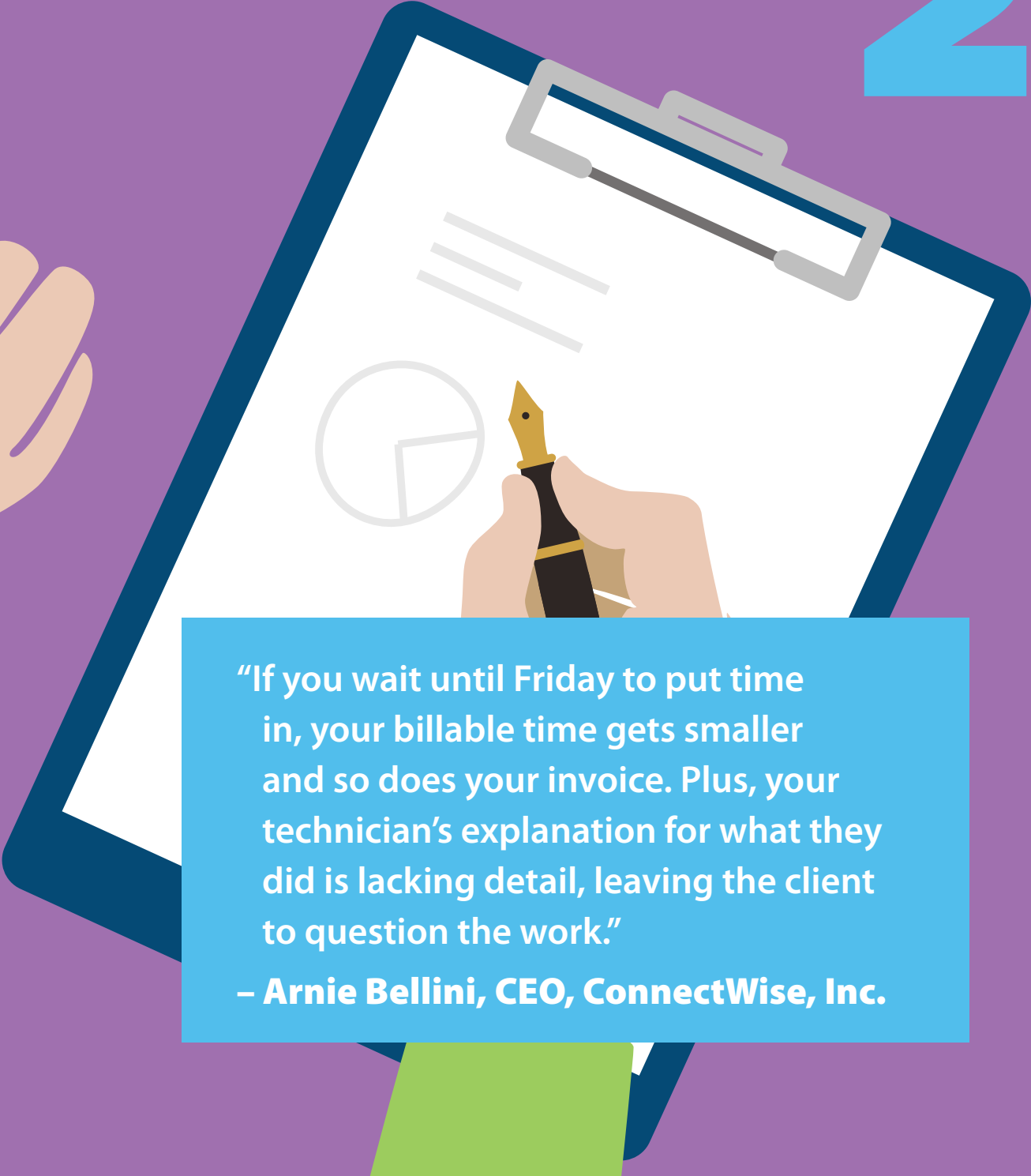05 Stretch the Job,
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2 Finish Paperwork Right Away

Sometimes, techs finish their support session with a client and move on to the next job without entering time or notes into the database. Thinking "I'll do it later" can often lead to longer entry times and inaccurate notes. Techs often grossly underestimate how long they were actually on-site.

Techs should finish all paperwork as soon as the issue is resolved. Here's why:

- More billable time captured (including the time it takes to enter notes)
- Accurate and complete notes – notes filled out at the end of the day/week lack detail
- Client can verify that work has been completed and the issue has been resolved.

Keeping accurate notes is not only a great way to keep track of billable time, but it is also critical in case the client disputes the invoice. It is imperative to thoroughly document every appointment so you and your techs have accurate records to back your service claims. Plus, if you can show your customers specific details of the work that was perfort med, it demonstrates transparency and justifies the cost of your services for them.

"If you wait until Friday to put time in, your billable time gets smaller and so does your invoice. Plus, your technician's explanation for what they did is lacking detail, leaving the client to question the work."

– Arnie Bellini, CEO, ConnectWise, Inc.

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3 Call Before Coming Back into the Office

Communication is key. When techs are in constant communication with the office, they have the ability to better navigate and arrange their days. Many factors can alter a schedule from hour to hour, so when dispatchers keep technicians in the loop, everyone is on the same page and can more effectively service customers and appropriately utilize time.

A great way to ensure your tech's schedules are efficient is to instruct them to simply call into the office after each and every off-site appointment. While constantly calling in might seem gratuitous, this one quick act could add up to several billable hours by the end of the month. When techs are done with an appointment, they might be in the vicinity of another customer who needs assistance, so it saves travel time back to the office. This technique works very well with a mobile business automation solution like ConnectWise, as techs can easily look up relevant information for the next job without ever having to travel back to the office.

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4 Account for All 8 Hours

How are your technicians currently keeping track of their time? If they jot it down on paper or try to remember what they did with their day, they could forget to account for all billable time. Look closely at their logs; if technicians haven't been thorough, have them go back and really recount their day. At least eight hours per day, five days per week should be documented. Have techs take time each day to audit and reconcile their hours. Utilizing a timekeeping system that allows you to see where gaps exist in the process helps eliminate lost hours, and provides management visibility into how techs are spending their days.

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It's a classic situation: Your tech starts a support session, and the client has a handful of other issues that they want fixed that they didn't initially report. Schedule out extra time for sessions; if you leave room for additional work, your tech will have time to complete and bill for those extra jobs.

In addition to stretching jobs, technicians should always enter tickets for every new issue that was brought to light. Again, getting your technicians in the habit of accounting for every minute of their day can make a big difference in your profits. They might think, "That extra issue will only take ten minutes – no need to keep track of it," but those extra ten minutes, five days per week, can turn into lost revenue.

Getting Your Staff On Board

It shouldn't be a surprise that you might face some objections when you start implementing these strategies–especially if your techs are set in their ways. It's time to break loose of those bad habits and replace them with ones that will increase their productivity, and your profitability.

Use these scenarios to prepare an explanation for when your techs complain:

Objection: Isn't it a waste of time to track time?
Response: Actually, no. It's investing in our future. You see, having visibility to where and how employee time is being spent helps us understand which areas of the business we should invest in down the road.

Objection: I'm already fully booked up and billable. Why do I need to do this?
Response: First of all, that's great! Keep up the good work. We know that being booked back-to-back makes it nearly impossible to accurately track time. To overcome this challenge, we re commend giving yourself a 5-to-10-minute block between appointments, so you can post time entries immediately after completing tasks.

**Objection:** Can I just track time, but not write descriptions about what I did?
Response: Unfortunately, just tracking time won't provide enough information to help us make your job easier. While we certainly don't expect you to write a novel, having a concise description for each time entry lets us see what work has been completed. And, when you're out of the office, having those explanations in our system helps your teammates provide better customer service while you're away.

Every business and every employee is different. Be sure to address individual objections with tailored responses. Above all else, your case for tracking billable time needs to be transparent. By explaining the value upfront, you'll put yourself in a much better position for success.

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The Future of Being Booked Up, Busy and Billable

Advances in technology are rapidly making it possible to do more work remotely from your office. Take a look at the number of on-site jobs your team currently has. Are all of those necessary, or could some (or most) of them be handled remotely if the right tools were available to them? It's important to not only set processes in place to help your team deliver at peak performance, but to also equip your business with the best tools for the job.

Utilize remote control, chat tools, and other platforms to help you deliver proactive service to all of your clients, regardless of location. They'll also help you save valuable time by eliminating commuting (or at least drastically cutting back on it).
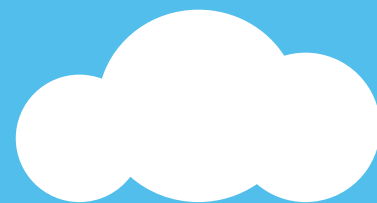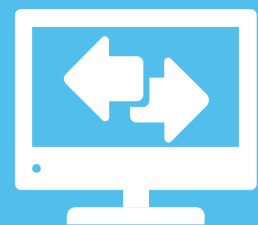
Chat Tool: Imagine the peace of mind you could offer your clients if they knew they could go to your website and chat with someone directly. The best part? Your team can use this tool to handle multiple chats at once, thereby multiplying their billable rate.

Remote Control: You can take instant assistance a step further by using a remote control solution to access a client's device and start fixing issues instantaneously. If when this solution integrates with your business management platform (BMP), you won't miss a minute of billable time.

Cloud Services: Create a cloud services practice area. By migrating your clients' systems into the cloud, you can proactively monitor and manage their cloud licenses securely and effectively. A cloud solution that works seamlessly with your BMP will help you capitalize on this industry shift.

While technology advancements can help you do more work remotely, it won't replace the need for human interaction from time to time. As more of your services are accomplished with automation and remote solutions, start hosting quarterly, face-to-face meetings to review how your services benefited their business. Take this opportunity to further establish yourself as a trusted technology advisor by demonstrating the value of your services, and showing them how you plan to help enable them to achieve their goals.

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It seems like a tired phrase, but there's truth in it: time is money. If your techs aren't utilizing their time efficiently, or are failing to document their tasks accurately (and on time), your profit will suffer. It's difficult to slow down and reevaluate processes, but implementing strategies to help you capture more billable time, and keep your team booked up all day, every day, will prove to be well worth it. The bottom line?

Don't miss out on revenue! Keeping your techs booked up and busy equals more billable time. If you create streamlined processes to help your techs capture every billable minute while they are in the field, you'll increase profits and efficiency. Service managers will have visibility into how techs are spending their time and will be able to more accurately schedule appointments.

The easiest way to keep track of time is through a business management solution like ConnectWise, as it will help you keep centralized records on all clients, and allow you to track time and maintain schedules while techs are on the road.

About ConnectWise

ConnectWise® transforms how technology solution providers successfully build, manage, and grow their businesses. Through the ConnectWise® Business Suite™ – a comprehensive set of award-winning solutions that deliver a seamless user experience – ConnectWise gives its partners the ability to increase productivity, efficiency, and profitability.

Just as importantly, ConnectWise's relentless commitment to innovation and unparalleled passion for partner success assures its partners have comprehensive business support throughout every step of their journey. Today, more than 100,000 users in over 50 countries take advantage of the competitive edge that comes from ConnectWise solutions and its powerful network of ideas and experts. For more information, visit www.ConnectWise.com or call 800-671-6898.

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