



Break-Up With Your Existing HVAC CRM Solution

Six Signs That Show It's Time To
Let Go



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IT'S TIME TO LET GO...

Stop Chasing A Dead End

We've all been there - we use a product for so long, it feels like a part of your business or organization. You cannot bear the thought of having to let it go for something better. In fact, in your eyes, there could be nothing better. The product was made for your business. Or so you believe.

It's easy to stay blind to all the negatives that come with falling in love with a solution. You might be using the product for so long you start to ignore a lot of the signs that are slowly but surely killing your business. And as much as it may hurt you, it is time to say goodbye.

Businesses often make the mistakes of sticking with the product they've been using since, well, 1902! And that's why they fail to keep up with some random solution that popped up three years ago and is killing it right now.

Let's cut straight to it - if you're an HVAC solutions and services business, you need to let go of your old CRM and all the problems it brings with it, and we're here to tell you why.

HVAC solutions have stayed the same for as long as we can remember - schedule services, assign tasks to technicians, figure out customer inquiries, repeat. It's no rocket science why there hasn't been much to improve on in the services industry. Managers have gotten comfortable with using outdated systems so long as they get the job done. And that's where all of humanity's problems reside.

But with the onset of the pandemic, things have changed drastically, and managers can no longer rely on their old, outdated CRMs to get things done. There are so many needs not being met in the world of field service, like:



- Accurate employee tracking on the field
- Automated information gathering and curation
- Presentable data on interactive dashboards
- Proper time tracking for field teams

We're going to help you fix this. But before that, there's something you need to do - Break up with your CRM

CHAPTER 2

They're Not The One



IT'S BEEN FUN

But They're Not The One. It's Time To Move On

By sticking with your existing CRM solution, you're doing your business more harm than good. You might think you're getting a good deal signing up for a 2-year contract with one of the best solutions in the market, backed by a 24/7 support team at your disposal, assured that you would never have the need for them.

Think back to the time you were paying for the software that would hopefully revolutionize the way your business operated. We don't blame you. That's how almost every product is marketed. It's targeted to make your heart flutter, to get you excited and dizzy, to give away your card details without much thought.

Six months and a million phone calls with the support team later, you realize something might be wrong. Most often, it's too late by then.

The skills required to get into the HVAC industry can cover a large spectrum, including:

- Complex component installation
- Electrical knowledge
- Plumbing
- Material science and expertise
- Project management
- Asset management and preventative maintenance management
- Handling woodwork and mechanical manufacturing
- Merchandising and stock checking
- Complex purchase order management processes
- Warranty inspection

Managing all these skilled professionals is kind of complicated without the right kind of tools.



W H Y

Your CRM Does Not Work

Here's what an advanced HVAC service technician management solution like Fieldproxy can do for you:

- **Customer relationship management software**
- **Quote management solutions**
- **CRM sales systems**
- **Inventory management and sales order tracking software**
- **Customer follow up systems**

In the coming chapters, we're going to be looking a bit more into why your existing CRM solution sucks for your HVAC servicing needs, and how you might go about forming a new love interest with one of the best service automation solutions on the planet.

But for now, we know for sure that **your current CRM isn't The One!**



CHAPTER 3

Red Flags You've Been Ignoring



CUTTING TIES

It's Never Easy. Important Nonetheless

When we're infatuated by a product, it's easy to turn blind to all the trouble that it might cause us. Worse, we might not even bat an eye when it impacts our business negatively. It's true, we've seen this happen with companies all the time!

You might be facing an issue with the product but you choose to use it anyway for a number of reasons, the most impacting one being that you've already paid for it and you don't see a way out.

RATHER, YOU'RE UNABLE TO FIND ONE

LOOK FOR THESE SIGNS

There are some surefire ways to know that whatever solution you're currently using for your HVAC servicing business is not working in your favour. Tick off a majority of these **red flags** and you know it's time to call it a day and go your separate ways.

SIGN #1: THEY LACK BASIC FEATURES

An HVAC field services automation software, at the very least, should help effectively decrease the workload of the field managers by making it easier for them to **organize and generate service schedules** based on the location, priority and availability of their field technicians.

If your CRM doesn't help with proper job scheduling, we don't know what you're still doing with it. Throw it away.

SIGN #2: ZERO CUSTOMER INSIGHTS

There's no getting around this one. Any service and solutions management tool or software should be able to provide a good report on the data you've fed into it. This especially matters a lot when you're feeding customer data into the system.

The CRM should be able to **make meaning out of the data** your field technicians work so hard to collect, and then help in taking care of either of three things:

- Modify customer data
- Categorize or Filter data based on some criteria or the other
- Automatically create presentable information for managers based on the data collected.

SIGN #3: IT CANNOT GENERATE REPORTS

Tracking business expenses can be a hassle. If you're not properly using excel to track your business expenses, you might be in trouble. This is precisely why you need a HVAC management software that can also work as an **expense management and reporting platform**.

Report generating tools have become an important requirement for managers and agents alike in today's post-pandemic world. It's imperative that your CRM solution double down as one.

SIGN #4: YOUR CRM LACKS FLEXIBILITY

At **Fieldproxy**, we provide one of the cleanest, most **flexible** user experiences that you can expect from a field service management solution, and we stand by that. We do this in the form of workflows that are tailored to each business' unique requirements. Managers can easily configure them as per their needs, or get in touch with one of our account management teams to help get this done. It's as simple as that.

If your existing CRM solution can say that, and prove it, by all means you should stay with them. But if they don't, you need change. A big one.

SIGN #5: LACK OF A DECENT MOBILE EXPERIENCE

This is kind of a basic feature, but so many businesses get this wrong that we just had to write it down - the whole world is going mobile. **Everything has a mobile app** - from social media to news to stock trading - so why does your customer have to open their browser to get a service scheduled?

If anything, **you owe the clients who pay for your service a good user experience**. Any good CRM should know that.

CHAPTER 4

Red Getting Over It

MOVING ON

But How?

We know it's hard. Breaking up with a product you've been using since the dawn of time and migrating to a newer one might seem scary. But the fact that you've made it this far along the book tells us you're willing to move on to better pastures. If that's the case, then congratulations! You're almost there!

The best way to get over your existing CRM is to completely shift over to a newer, better customer and service management experience. And while that is a tough shoe to fill, it certainly isn't impossible.

As we mentioned earlier, HVAC services and solutions require people with a lot of technical expertise. To manage these field experts, you need a solution that can cater to all these people.

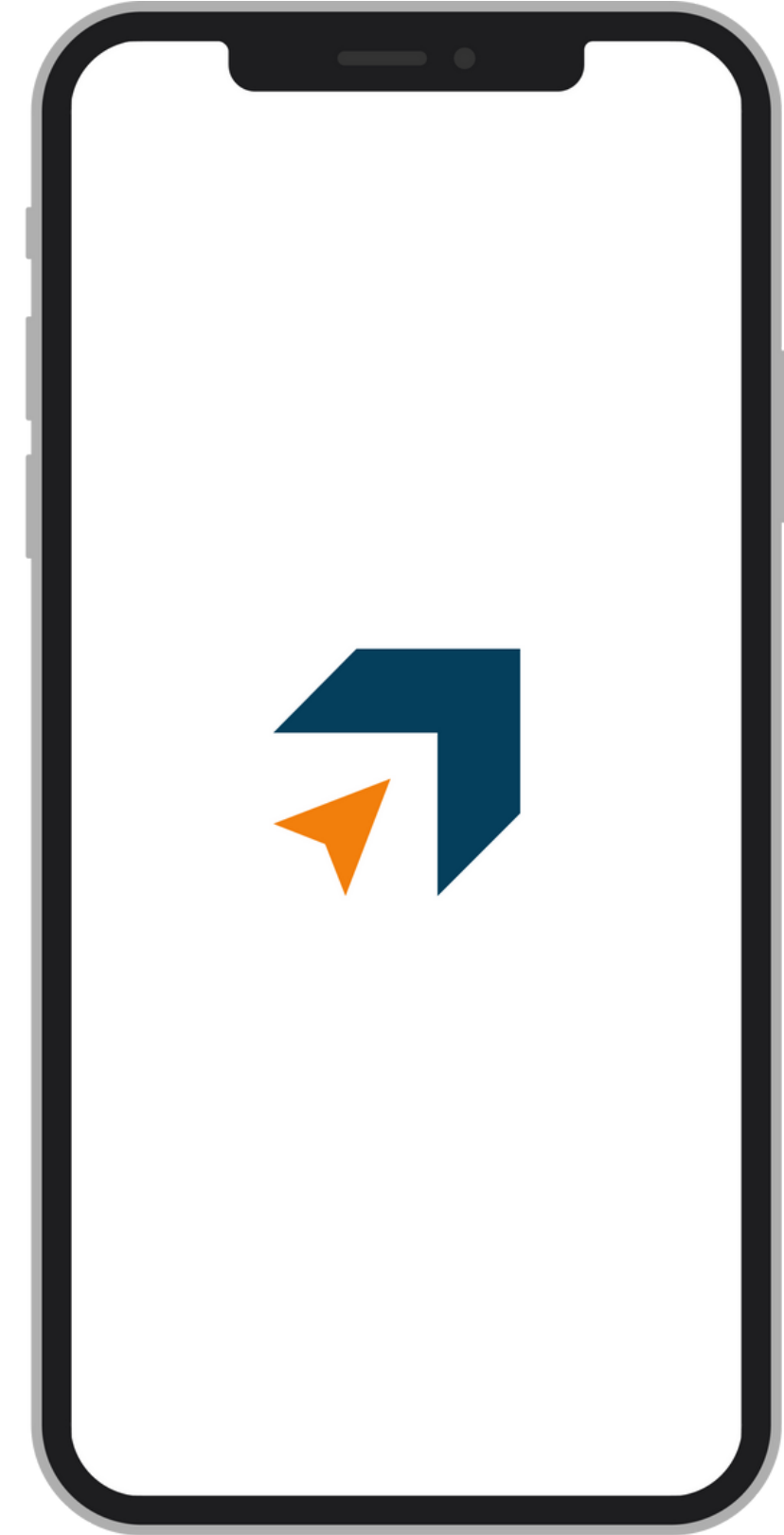


Enter Fieldproxy

Fieldproxy is a field service management platform for your HVAC service automation needs! It can double down as a CRM system, a services scheduling and maintenance platform, a task management solution, expenses reporting tool, and much much more.

What Can Fieldproxy Do For You?

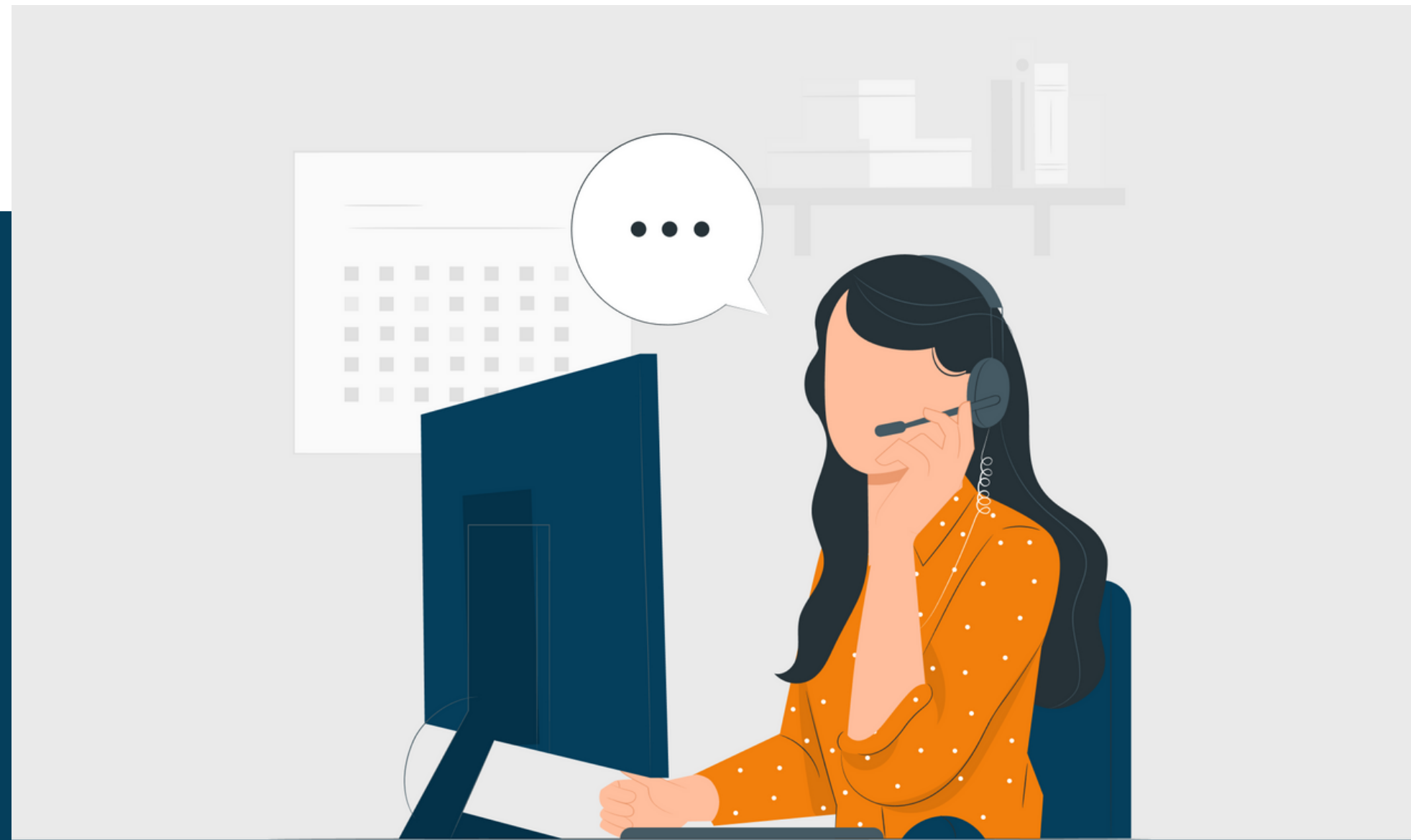
There's a lot that Fieldproxy can do for your business. From organizing tasks to getting agent responses, collecting and organizing data and much more. Let's take a look at some detailed metrics that might interest you as a HVAC service and solutions business.



1.Customer Support

What is a service management tool if it doesn't provide good customer support? A quality field service management tool should provide the HVAC sector customers with customised views of appointment windows, services being provided, and payment arrangements. Customers should be able to easily and effortlessly post their service inquiries using the site's convenient online request form.

And that is exactly what Fieldproxy offers - complete chat and call support with thorough product documentation and walkthroughs. You'll never be left hanging again.

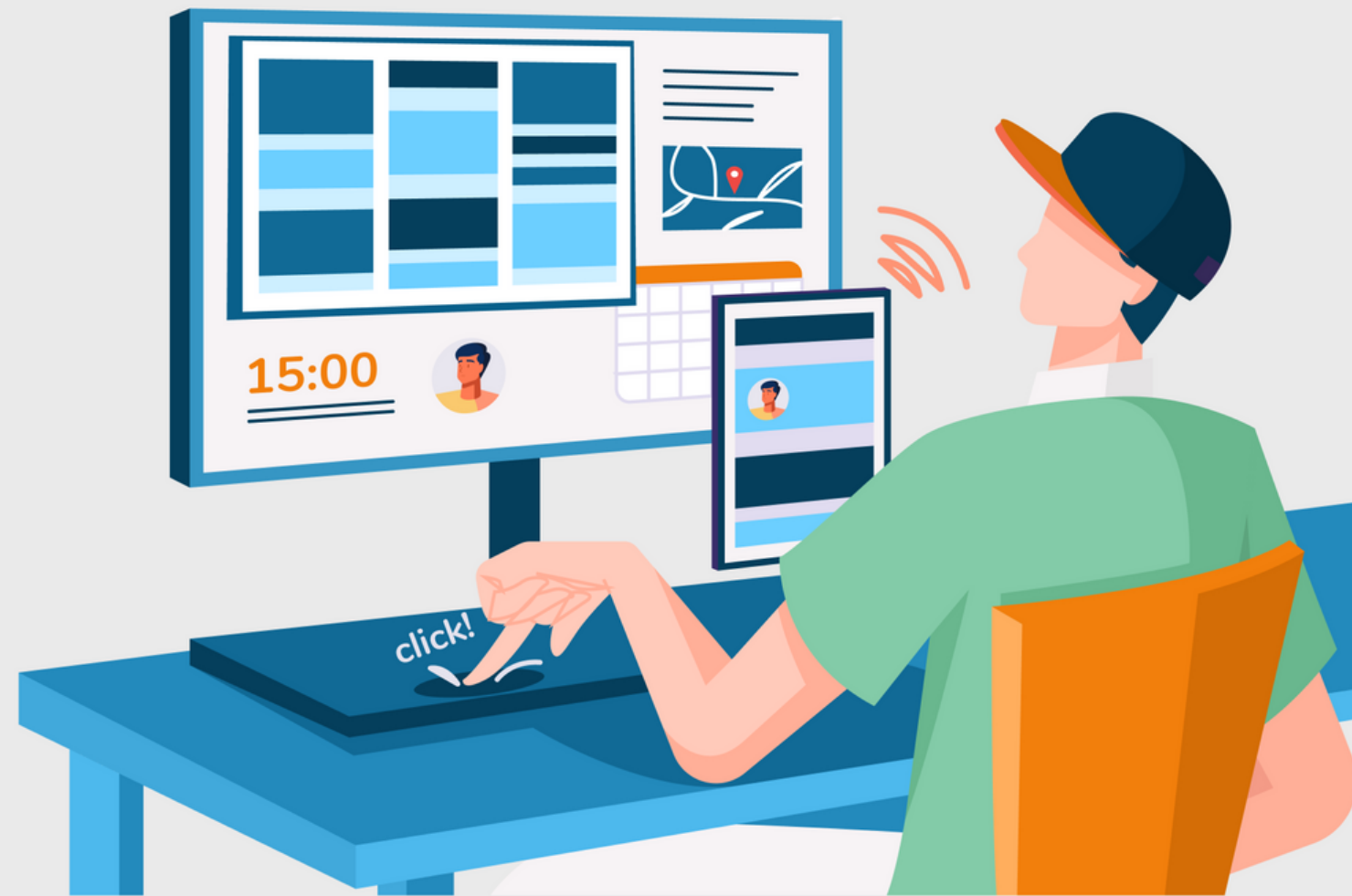


2. Real-time data dashboards

Field managers should be able to filter the agent metrics according to their needs and can easily view the performance in a dashboard. Tedious reports should also be automatically generated. Find a system that helps make your life easier, and you've already won.

Fieldproxy helps you achieve this better than most competitors in the HVAC space. Here's what you're getting with Fieldproxy:

- Real-time dashboards
- Interactive data sheets and responses
- Live agent response tracking and monitoring
- Location-based live task activation and scheduling

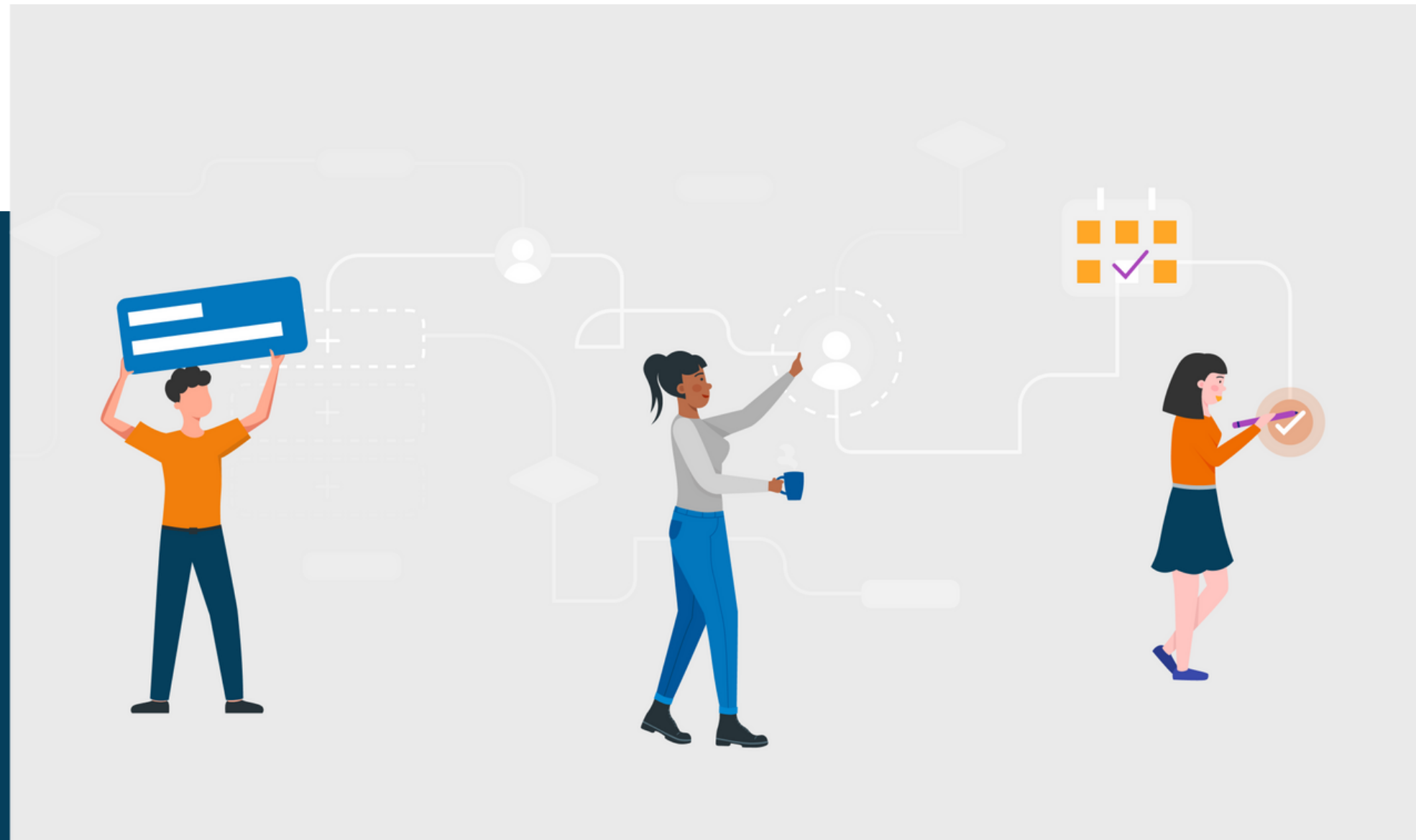


3. Flexibility minus the complexity

Fieldproxy has workflows specially designed to ensure that the on-ground field agents are safe and secure. Like we mentioned before, our low-code solution can be tailored to fit your business needs, and it can be done in as few as 12 minutes.

Getting used to the entire product takes less time, so you know you can get your business up and running again faster than before.

All this and more at prices almost unheard of? Trust us, Fieldproxy is going to be the best decision you've made for your HVAC servicing and solutions business. Break up with your existing CRM already. We can't wait to take you out.



To Summarize:

- Your existing CRM has broken your heart. Time to cut ties.
- Getting a new trusty solution - it's easier than you think.
- Fieldproxy has just about everything to fit your HVAC servicing automation needs
- It's a low-code, completely flexible, low-maintenance application, tailored to fit your business needs
- Job scheduling is simpler.
- Task allocation and automation is taken care of.
- Flexibility to the max.
- Real-time customer and field agent information at your fingertips
- Enhanced customer support.
- Do you really need anything else?

CHAPTER 5

Happily Ever After



FINDING THE ONE

It's A Long Journey. All The Best!

While we may boast about Fieldproxy a lot, the truth is, it might not be the one for you. Sure, it's got almost everything you can dream of in a field service automation platform, not everyone wants everything.

Not everyone needs a flexible solution. Some businesses might just need a monitoring solution for their field teams, or maybe a small expense management software that keeps track of the daily expenses of your technicians.

Some may even want a solution that caters to just the simple case of fetching whether or not a task has been completed.

And while Fieldproxy can be tuned to your liking, we're more than happy to see you happy with a solution that you believe is working just perfectly fine for you.

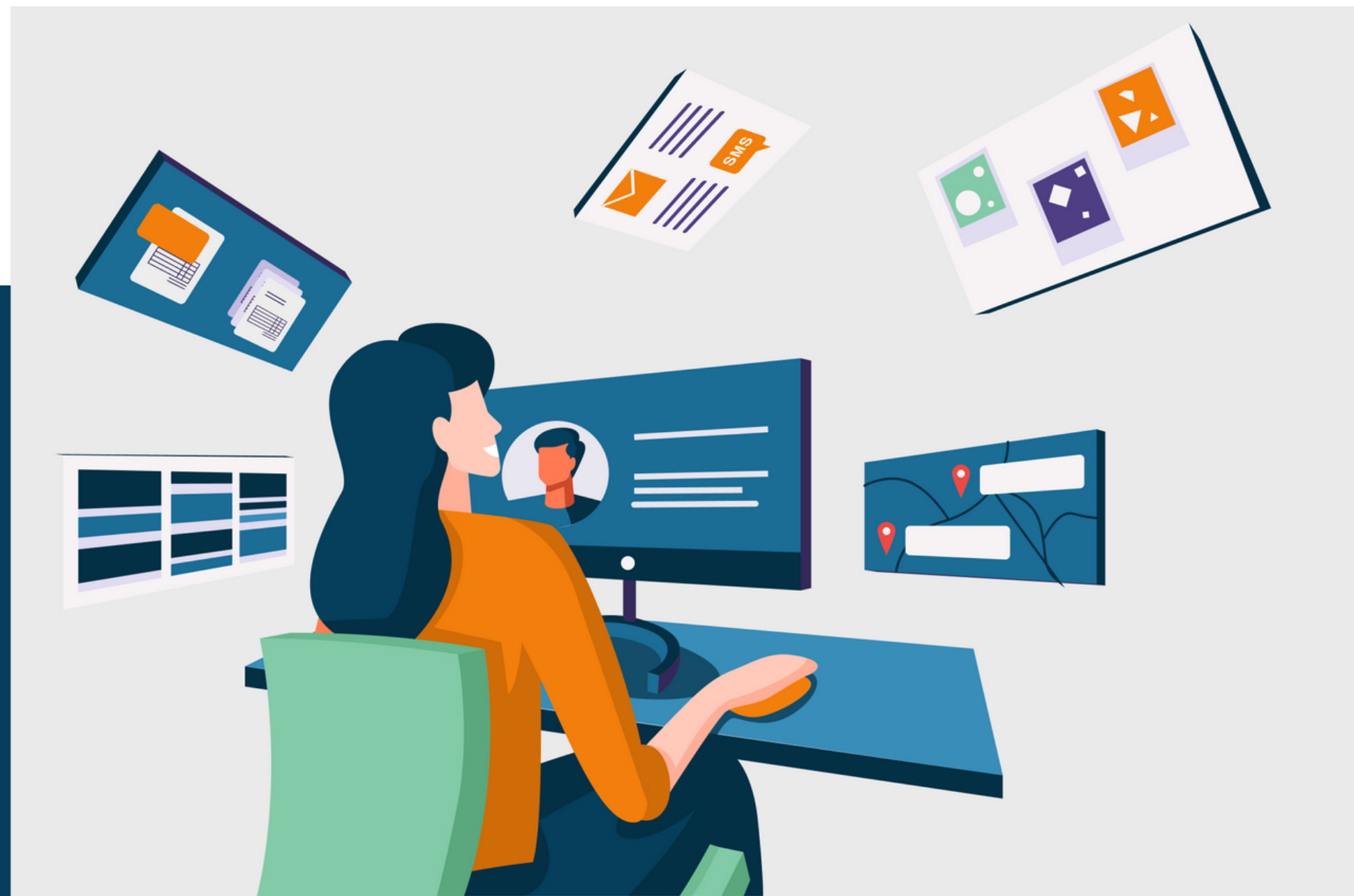
Because at the end of the day, what matters is if YOU and your business benefit from the service. Nothing else matters.

Finding the perfect solution for your business is a long journey. **But it's one you definitely need to go on.**

We hope you found your perfect solution through this book. And if you didn't, well, at least you know **your existing relationship with your CRM isn't going to last long.**

That single fact should be enough to propel you towards finding a better software partner for your business.

We wish you all the very best in your hunt, and sincerely hope that our paths cross again!





Think Fieldproxy is the right fit for your business?

Get a free seven day trial, no-questions asked, and see how Fieldproxy can transform your field teams today.

[click here to sign up for a free trial](#)

On The Fence? [Sign up for a free demo](#) and our team will reach out to clarify any questions you have.