

HOW UTILIZING NEW TECHNOLOGY CAN BENEFIT YOUR BUSINESS

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Dan L'Herbier
MBA, CVI, ASCS, CDET

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- ✓ All participants are encouraged to read and follow applicable standards, codes and regulations related to this topic.
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WHAT IS A CUSTOMER RELATIONSHIP MANAGEMENT (CRM) PROGRAM?

- By Definition: A CRM program is technology for managing all your company's relationships and interactions with customers and potential customers. These programs help companies stay connected to customers, streamline processes, and improve profitability.
- These types of programs are commonly referred to as work management programs, field service programs, or even scheduling programs.
- There are programs and software such as scheduling programs, that handle one area of the business, but a CRM program is designed to handle everything in one place.



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MY PERSONAL EXPERIENCE

- As someone working in the industry, with a second-generation family business, I have personally experienced the difference that this technology can make.
- When I started working, we did everything on paper. This was very time consuming, left a lot of room for error, and took up a lot of space!
- After implementing our program that we chose, we saved so much time, were much more organized, had a more professional appearance, and expedited our company's growth!



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THE BENEFITS (SAVING TIME)

- Time is Money!
- Saving time for yourself and employees, while also being more accurate and consistent should be a no-brainer!
- We have literally saved people's time in every area of our business since implementing our program.
 - This was true for both office staff and our technicians out in the field.
- You may even find that this will eliminate bookkeeping or data entry positions. For example, we were able to cut our bookkeeper's workload by over 75%. In our case, we adjusted her hours, but you could even add some additional responsibilities to that person.
- Some programs do have the option for customers to plug in their information, generate a price, and schedule their appointment on their own. We do not currently utilize this option, but its available.



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THE BENEFITS (BEING MORE ORGANIZED)


- Organization is key, especially as your company grows
- The nice thing about these programs is that every step, from the initial call to collecting payment, is handled in one place.
- The program serves as a customer database, which allows anyone with access to look up past customers and job information.



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THE BENEFITS (BEING MORE ORGANIZED)


- We can easily set up a new request for our estimators to perform an initial site visit.
- New requests can also be created by customers on our website, social media, and through the referral feature.
- Quotes can be prepared and sent out through the system.
- Once a quote is approved, we are notified, then the job is created and scheduled.
- When a technician is assigned to a job, they can easily view their schedule and all job notes on the mobile app. We use phones, but tablets could be used as well.
- When a job has been completed, the invoice can be easily generated by the technician in the field, or someone in the office.
- Notes and pictures can easily be attached to quotes, jobs, and invoices.
- Payments are all collected and applied in the system.



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THE BENEFITS (BEING MORE ORGANIZED)

- Payment collection is one area that you can choose to do within the program or use a third party.
- We started out using a third party for credit card processing, and quickly switched to the payment processing option offered by our program because of the convenience and organization benefits.
- If you are collecting payment onsite, that can be easily done by the technician in the field.
- Customers can pay by cash, check, ACH, credit card, or follow a "link to pay" on the bottom of their invoice.
- As soon as a payment is recorded, the invoice status changes to "paid", and it is automatically recorded for accounting purposes.
- The system can also be set up to send out payment reminders and past due notices if you choose.



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THE BENEFITS (REMOTE WORKING)

- The use of a CRM program can give certain office positions the ability to work remotely.
- Having the option for remote work is great, but this does not mean you have to offer it to employees. Exceptions can be made in certain circumstances such as a pandemic or family situation where an employee does not want to miss work but can not come into the office.
- You may decide to give some people the option to work remotely part of the week or even full time. This can help reduce office expenses, and it is viewed as an additional employee benefit by a lot of people in today's world.
- The ability to view any work-related information at any time or place is a great benefit for owners and managers.



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THE BENEFITS (A MORE PROFESSIONAL APPEARANCE)

- Between dirty papers, messy handwriting, addition errors, etc., this would be a huge improvement!
- Having a nice computer-generated quote and invoice with your logo and important job information has become expected by customers and helps build customer confidence right off the bat!
- Easily attach additional information about your company and other service offerings.
- Our company sends out a final copy of the invoice/ receipt with the before and after photos attached, customers really appreciate this.

DATE	DESCRIPTION	AMOUNT	TOTAL
1/15/24	1. Material	1,200.00	
1/15/24	2. Labor	800.00	
1/15/24	3. Fuel	150.00	
1/15/24	4. Insurance	100.00	
1/15/24	5. Taxes	150.00	
1/15/24	6. Other	100.00	
1/15/24	Total	2,400.00	2,400.00

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THE BENEFITS (CLIENT COMMUNICATION)


- Good communication with your customer is always important!
- There are multiple different client communication features in these programs that you can utilize such as: appointment reminders, quote follow-ups, payment reminders for past due invoices, etc.
- For example, we have an email automatically go out 24 hours in advance to remind customers of their appointment. They also get a reminder text message at 8:00 a.m. the morning of their appointment.
- All messages going out should be professional, friendly, and to the point. Having these messages typed in advance is a benefit because it keeps them consistent and professional, in case some team members don't have the best writing skills.
- The program we use provides access to a client hub, which allows them to view all quotes, upcoming and past jobs, invoices, and payments. We found that commercial customers and contractors especially like this feature.



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CLIENT COMMUNICATION (SETTING UP)

- As I mentioned, the company will assist you with setting up your new program. It will be up to you to set your preferences on timing of automated communication, the message you want to be sent, and the appearance of the material sent.
- You will upload your logo into the system to be shown on all messages.
- Any messages that you want to go out automatically will be typed out during initial set-up.
- You will then set the timing preferences for when certain messages will go out.
 - For example: We have a quote follow-up message sent out three days and seven days after the initial quote was sent.



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THE BENEFITS (COMPANY REPORTS)


- If you are running a business, there are certain financial reports or stats that should be monitored.
- Separate from your accounting software, CRM programs generally make it very easy to monitor company stats and other financial information.
- You can monitor additional stats that wouldn't be tracked in your accounting program.
- Here are some examples:
 - Quote reports (approved and outstanding)
 - Salesperson stats (Closing Rate)
 - Customer Retention (Visit reports)
 - Marketing Data (source of calls)
 - Invoice and payment summaries



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THE BENEFITS (THIRD-PARTY APP INTEGRATION)

- Certain programs, like the one we use, can integrate with third-party companies to expand the things you can do all under one program. The alternative would be having to use various other sites for different business services.
- Some examples of third-party services that we have integrated are GPS tracking, email marketing, and a review generating service.
- Most companies, like us, use Quickbooks or another accounting software for your business. Most CRM programs do not substitute the accounting software. However, our CRM program syncs with Quickbooks automatically, so all invoices and payments transfer into Quickbooks immediately.
- Most apps will work automatically, and not require any of your time.



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THIRD PARTY APP INTEGRATION (SETTING UP)

- There will be specific apps that can be integrated with your program. Some programs will offer more options than others; some companies may not offer app integration at all.
- This sounds complicated, but you will not have to try to integrate apps yourself. This is something that your program customer service department will do for you.
- It is important to make sure your program of choice integrates with your accounting software, unless you plan on switching that. For example, Quickbooks is very common, and most programs would sync with that.
- There is usually no charge to integrate a third-party app, however there will most likely be a fee or subscription for the third-party company's service.



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THE BENEFITS (GENERATING NEW BUSINESS)

- Programs like this add additional ways to generate more work and new business.
- One example is that our program makes it very easy for customers to refer us to people they know.
 - This is done through the click of a button
- Being convenient and simple, makes it more likely for people to make referrals. You can also choose to provide credits or discounts for either party in the referral process.
- Customer retention is also very important! Programs like this make it easy to reach out to past customers to ensure they are satisfied, or to see if they have any new projects, they are interested in.
- There are also third-party apps that can be integrated to automate email marketing.



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FINDING THE BEST FIT FOR YOU AND YOUR COMPANY


- Its important to find the best fit for your company's needs. Company size, along with service and product offerings are an important factor.
 - For example, some programs have a detailed inventory management feature. If you don't sell many products, you may not want or need a more expensive or complex system like that.
- All programs will offer a demo session and walk you through everything. I would suggest demoing multiple to find the best fit.
- One thing that was extremely important to us was the scheduling view. As a company running many crews each day, we found that a lot of the programs did not offer a schedule view to accommodate this.
- Third-party app integration is important to consider when shopping for programs. This ability might not be important to you at first, but we have found it to be a great feature after starting to use our program.



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PRICING


- Most people assume that CRM programs are very expensive. This is not always true; it really depends what you are looking for.
- For example, our program is a great fit for our company, and we pay about \$230.00 a month. There was also no initial set-up fee or required agreement. Best money we ever spent!!
- With some programs you pay per user, others have different plan options that include a set number of users.
- Some programs have a lot of "bells and whistles", or features that you may not use, such as inventory management that can be much more expensive.



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SETTING UP YOUR NEW PROGRAM

- Setting up a new program, or especially going paperless for the first time can be very intimidating, especially for someone that is not great with computers and technology.
- Don't let the fear of the unknown deter you from looking into a CRM program.
- Most, if not all, program companies will walk you through the set-up step by step to make sure you get started off on the right foot.
- I personally found that the set-up for our program was extremely easy and did not require any special computer skills.
- You may or may not decide to add some level of customization within your program; some programs offer more customization than others, but this would also be guided by one of the program's implementation specialists.



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IMPLEMENTATION WITH YOUR TEAM MEMBERS

- Once your program is all set up, its very important to make sure everyone at your company is properly trained.
- Training sessions are usually offered by the company.
- I chose to get fully trained on everything myself first, then train everyone else at our own pace. I preferred this path so that I could provide tailored training based on our company's specific processes. The size of your company could determine if you want to do the training yourself or not.
- I did one training session on the program with everyone in our office, and then did a separate training on the mobile app for technicians in the field.
- Most of these programs are very user friendly. It did not require much time for me to get everyone properly trained.



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ARTIFICIAL INTELLIGENCE (AI)

- By Definition: Artificial intelligence is the science of making machines that can think like humans. It can do things that are considered "smart." AI technology can process large amounts of data in ways, unlike humans. The goal for AI is to be able to do things such as recognize patterns, make decisions, and judge like humans.
- Some CRM programs do incorporate AI already (ours does not).
- AI is already being used for sales and customer service, content creation for marketing or internal use, hiring, training and onboarding, automated scheduling, summary and outline writing, legal document creation, business plans, website chats, market research, data analysis and reporting, and even social media management
- Its important to know that there are a couple different companies that offer AI technology. Open AI is probably the most common developer, which offers the technology referred to as GPT.
- Open AI's image generation model is called Dall-E; this is the image creation technology which is used on the ChatGPT app and most other AI apps.
- There are many different apps and sites that utilize GPT and Dall-E technology
 - This technology is continuously developing, with the newest version being GPT-4 and Dall-E 3.



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ARTIFICIAL INTELLIGENCE (AI) – WHERE TO START?

- There are numerous different sites and apps that can be downloaded, in addition to some CRM programs with this technology built in.
- The most common app/site is called ChatGPT.
- It is easy to download these apps and work with these sites on your mobile devices or on a computer.
 - Most of these apps and sites are free to use at this point, but some do offer premium services to utilize the latest ChatGPT-4 technology and the Dall-E image creation technology.
- AI technology uses information found on the internet to create its results. Although very accurate, opinionated responses may vary.
- It is important to provide a detailed request to get a detailed response. You can include your company name in your request to generate a more customized result.
- I have not experimented with AI technology for sales and customer service applications, but many people believe this will be very common in the future. If so, it may replace the need for sales and customer service people in the office.

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ARTIFICIAL INTELLIGENCE (AI)

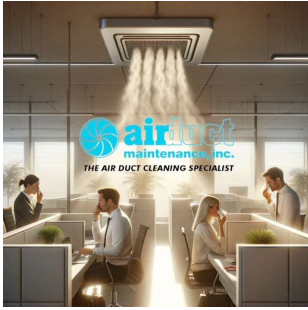
- Example of image creation for marketing purposes.
 - Be detailed in your request
 - Once image is generated, you can continue to edit it.
 - Image creation requires a paid subscription on the ChatGPT app; you can create as much material as you want during your subscription



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ARTIFICIAL INTELLIGENCE (AI)


- Commercial Example



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ARTIFICIAL INTELLIGENCE (AI)


- Dryer Vent Cleaning Example



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ARTIFICIAL INTELLIGENCE (AI)

- Just for fun!




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RECAP - THE GOOD STUFF!

- If you do not currently use a CRM program, or if you aren't happy with your current one, you can really bring your business up to the next level by having a good program in place.
- Not only do these programs save time for everyone at the company, but you will also be more organized, have a more professional appearance, improve your client communication, and easily monitor your company performance at any given time.
- You gain the option of remote working and the ability to view company information anytime.
- Pricing mostly depends on your company size and business needs. I think you will find that most programs are very affordable, and money well spent for the value that you will receive.
- Don't let set-up and implementation intimidate you. Most programs are very user friendly, and most of the set-up will be done for you. Plenty of training time will also be provided by the company you choose.
- Artificial intelligence either within your program or separate, will help you with a variety of tasks, both saving you time and money. This technology can already do things better than human experts; use this to your advantage!
- AI will continue to improve and offer more capabilities. I suggest starting to learn more about it, and ways that you can utilize this technology with your business.

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QUESTIONS?

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PRESENTER CONTACT INFORMATION
 Dan L'Herbier
 Air Duct Maintenance, Inc.
 Pittsburgh, PA
 Dan@airductmaintenance.com
 Note: I am happy to share the name of the programs we use, just ask!

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