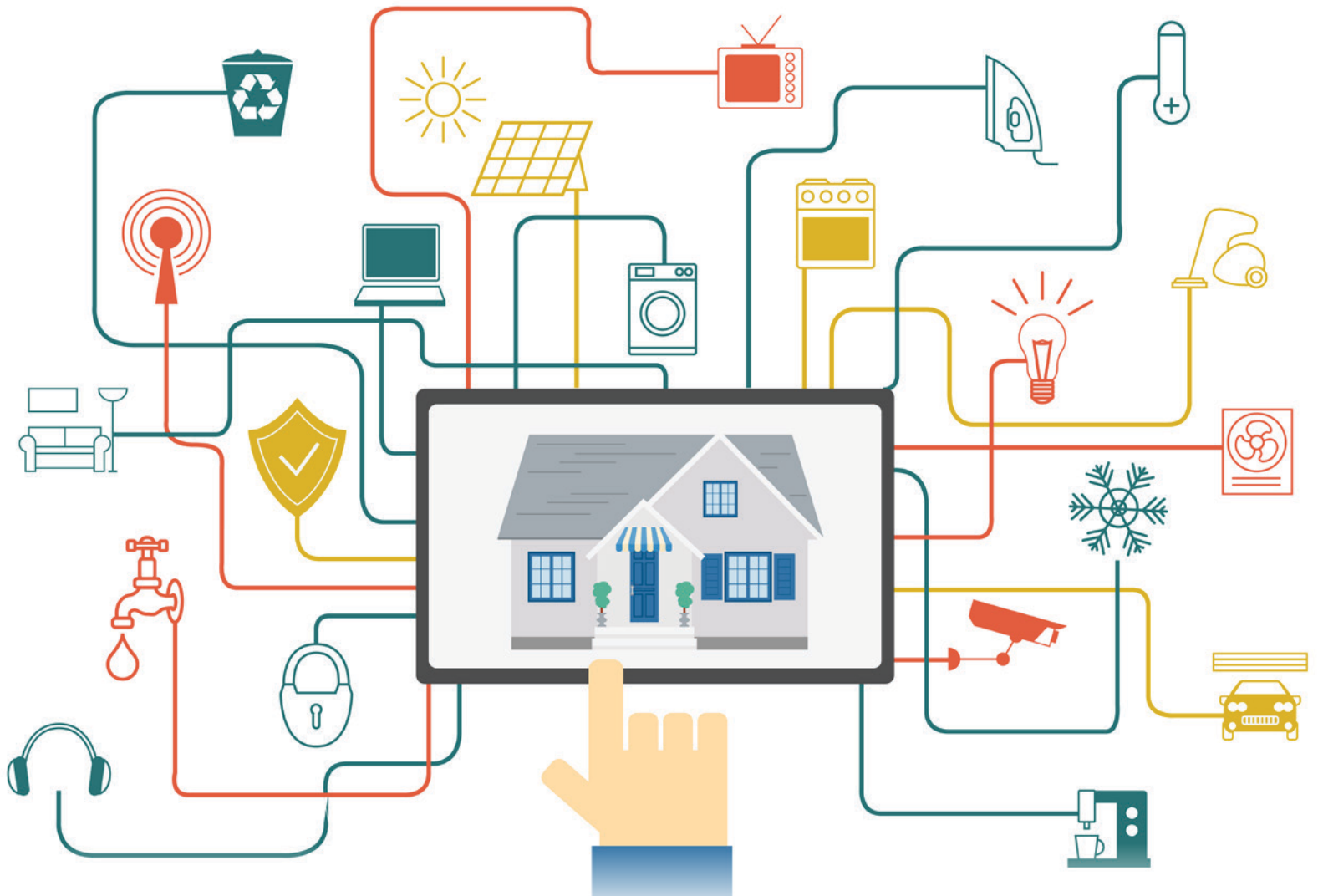




ALARM
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THE EVOLUTION OF THE FIELD TECHNICIAN

Executive Summary

Change can be difficult in any industry and over the past several years the alarm industry has been facing a great deal of change. With the pace of new disruptive technologies increasing and a growing number of bundled services being offered, the role of the field technician

is evolving. This is both an opportunity and a challenge for business owners. To help you meet the challenge, we'll discuss ways to grow a team that will keep you on pace with the industry and competitive in your market.

THRIVING IN A NEW AGE

For all intents and purposes, the basic technology of an alarm system has remained fairly constant for a long time. It's pretty safe to say we have witnessed more technological advancements though in the last ten years than we have in the last hundred.

If you've had your business for any length of time, the move from the mechanical era to a digital age may seem like old news. But the speed of change is increasing. New competition is entering the market in the form of Do-It-Yourself (DIY) systems, and through telco and cable providers, who have built-in access to a wide base of customers and can bundle alarm services with the services they are already providing.

Who installs the alarm system is not the only thing changing. The ability to integrate and control once disparate systems is driving consumer expectations as well. Consumers are actually redefining what they want out of their alarm system provider. They now expect home automation, lighting, locks and thermostat control, IT,

networking and entertainment, as well as security and protection from fire, carbon monoxide and water leaks.

We are quickly moving from the protected home to the connected home.

Consumers are redefining what they want out of their alarm system provider.

Change is not necessarily a bad thing. But if any change is hard, rapid change is harder. And let's face it; we've been in a relatively slow-paced industry up until now.

With the overall industry growing and growing fast, we need to adapt, and adapt fast, to remain competitive. That means we need to find, train and retain field technicians - the heart of our business - who can not only weather the changes to come, but thrive in them.

RECRUITING

In a recent survey from SDM Magazine, inability to find qualified personnel ranks as one of the top two challenges for security businesses.

Overcoming this challenge will require a change in mindset.

In the past, since the skill sets required by a field technician remained fairly constant, finding qualified candidates was, if not easier, at least more straightforward. The range of skills needed could be measured, and being a jack of all trades was a plus.

Over time, on-the-job experience would gradually increase both individual skills and value to the business.

of that, many of the technologies being introduced are 'disruptive' - meaning they are coming from outside the alarm industry instead of within. It stands to reason, then, that the skills necessary to remain competitive may also not be found within.

The go-to resources of the past will not cut it anymore. And although it happens, poaching technicians from a competitor doesn't make the resource pool any larger, and ultimately will be to the detriment of everyone.

If, as many business owners report, you are finding the pool of experienced personnel slimming, you need to broaden your search. Look outside and consider recruiting from other sources.

Just as alarm technologies are integrating multiple systems, there are several tangent industries that we can now look to for recruiting.

With so much of the integrated home moving communication via IP (Internet Protocol) - networking specialists would be a good place to start. For instance, who is the go-to person for setting up the network in your own home or business?

Be creative. Your local Best Buy, Apple Store, or Micro-Center may have technicians with network skills that translate easily. Coming from a retail environment could be a plus, as they likely have customer-facing experience as well.

The HVAC industry may also be a source for installers familiar with wiring and programming thermostat systems. Look for other industry associations that hold trade shows local to you.



When a new piece of equipment was introduced, training or manuals provided by the manufacturer were sufficient to get a technician comfortable and up to speed.

Today, however there are too many systems to be integrated and one generalist cannot possibly deliver a quality solution in every scenario. On top

And don't forget the telco and cable industry as a source of technicians with skills that can translate. As those companies move more into the security market, they bring with them the benefit of a large pool of highly qualified candidates, to which you can provide an alternative career path.

Not only where we hire from, but the process of hiring, will need to be examined as well. More specific expertise is needed, so the job definition and requirements will need to be more specific too.

In some cases, it might make more sense to hire multiple specialists, instead of one generalist. Properly utilized, that initial upfront expense in payroll can be quite profitable, giving you an increase in capability AND capacity.

Being able to adapt and change and being eager to learn will be critical. Anyone with a "that's the way it's always been" attitude will not last.

Even though some may think this is generally a 'younger' mindset, it doesn't necessarily equate to younger staff. A penchant for learning and growth can be found at any age. It simply means that it will become more important to hire the right attitude than the right resume.

Your true competitive edge will be in assembling a group of field technicians that support each other with their individual strengths.

The next challenge, of course, becomes how to create an environment of training, learning and support for your new teams.

TRAINING

With new technology and new products being introduced all the time it can be hard, even exhausting, to stay up to date. It can get tempting to resist it all and stay with what you know, but ultimately that doesn't help your technicians or your business.

But that doesn't mean every new technology should be immediately adopted. Guide your company strategically and keep at the forefront what adds most value to your service offering. Look at the skill sets within your organization and examine the gap between your current capability and the customers' need. Then you can make a decision—you can train your existing technicians or

you can find someone with hands-on experience. Most likely you'll find it's necessary to do a little of both.

No disrespect for the experience brought by long-term technicians, but the learning curve for existing industry professionals can prove challenging.

While challenging, it's certainly not an insurmountable undertaking. The training and information provided by manufacturers is improving, but due to the nature of integrating systems, it must be supplemented with third party training.

To remain competitive you have to look at your business as a learning organization.

The classes available today, both online and in-person, have improved dramatically in the last few years. Your own specific business situation, its location and the number of staff needing training, will all factor into determining what combination of online or in-person training makes the most sense.

Ideally, you would take the course yourself to evaluate whether it is both sufficient in content and effective in delivery. One way of doing this is to use CEUs to your advantage. Instead of just taking them to fulfill the obligation, take a course or two you may not have taken otherwise and assess if it would be of value to your team.

If you can't do it yourself, you need to think creatively. Choose a few courses and involve your team in auditing them. They can provide the evaluation and if worthwhile, cross-train their other team members.

A good place to start looking at courses is the [ESA](#), [AFAA](#), [NTC](#) or [EliteCEU](#). Many state associations offer periodic training courses as well. A Google search will help you locate local facilities for in-person training.



The courses delivered online versus live may vary, but, ultimately, they will involve both hardware and software.

Hardware

Today, we are faced with the issue of tracking safety and installation codes in systems we had not faced before. This requires a greater understanding of multiple devices so they can be successfully integrated with other systems. And this raises uncertainty: who is responsible for an integrated device?

Thermostats, for example, are the brain of the HVAC system. Who does the customer call when a heater stops working after an install?

Without basic training in HVAC systems and thermostat functionality, your technician will not feel comfortable in the field.

Software

The process for programming devices has changed dramatically as well. In the past, you needed to know the intricacies of a proprietary system, but they were self-contained systems. Today, we are expected to integrate alarm systems with locks, lights, thermostats and other interactive devices like Alexa and Echo from Amazon.

This multiplies the possibilities and with them the need for a greater understanding to make these systems function in harmony. So how do you gain that understanding?

Because the systems were proprietary, we've traditionally been able to rely on the equipment's manufacturer to provide the training.

Third party training now provides the crossover courses that are necessary in areas that are not specific to a manufacturer - IT, networking, and home automation for example. It becomes incumbent upon us as business owners and leaders to vet the training we provide our staff.

[ESPA](#), [CEDIA](#) or [ProTrain](#) are a few of good places to start your search.

For more specific training, you can also look to [Honeywell](#), [Interlogix](#) or [The Z-wave Alliance](#) to name a few.

Another approach is apprenticeship. Ages ago the only way to learn a trade was through apprenticeship. A young tradesman would take one to five or more years to become an expert in their field. But knowledge can flow both ways

between the teacher and student. It doesn't have to only be the 'experienced' technician teaching the young.

Some states still require an apprenticeship to be eligible to earn a license. If you are a member of [ESA](#), start your research on license and certification requirements here.

Alternative sources of license and certification requirements can be found at [NECA](#), [License to Work](#) or [NTC](#).

Remember, training is not a one-time event. To remain competitive you have to look at your business as a learning organization and instill a training culture. To help the evolution of the new field technician, you must put in place a process for continually evaluating new technology, tools and their related training, and then being creative about the steps to implementation and broadly disseminating the knowledge amongst your team.

RETENTION

Recruiting and training quality field technicians is an investment. And savvy business owners will now protect that investment by making great strides in retaining their staff.

Retention begins with a quality hire in the first place. Make sure you have an intentional hiring process, and be sure the position matches the strengths and values of the applicant.

You've probably heard the phrase "Hire slow, fire quickly." As tempting as it may be to hire the first decent candidate you come across, it's important that your hiring process finds individuals that

not only have the technical ability but also are a cultural fit. You are building a team and one person's poor attitude can be a drag on everyone's morale.

Some successful business owners give final candidates a paid, challenge assignment. It is designed to have the potential hire demonstrate a skill or skill needed. After all, a resume and interview only tells so much. Cap the project at 4-5 hours-worth of work, and you can get a good feel for what they are capable of. You may run several candidates through this process and the exercise is still less costly than making a long term mistake.

Pay rate is most certainly a primary driver in attracting and retaining personnel but we need to look beyond the paycheck and create an environment where individuals can benefit from some of the less tangible forms of compensation as well. Job security, satisfaction, recognition and opportunity to grow can all be strong factors that high performers consider in making career decisions. Being equipped with proper, modern tools both enable individuals to be more efficient and demonstrates that business owners and managers understand the challenges encountered in the field.

Goals

Set smart goals for your team and determine the key metrics that will motivate your team to work toward those goals. People stay motivated and engaged when they can clearly measure success. Implement bonus and incentive plans which are meaningful to both company and employee.

The best scenario is when your technicians share in the business's success. Some good measurements that can get everyone focused on the same goals include:

Quality of Service

- **NPS Scoring (based on surveys sent following specific transactions with customers)**
- **Time to Service, from request to completion**
- **Backlog reduction**
- **Minimizing wait time**

Revenue

- **Maximizing Time and Materials revenue generation**
- **Increasing billable hours and Upselling**

Cost Reduction

- **Rewarding specific suggestions for saving the business money**

Vehicle Adherence

- **Safe driver awards**
- **Care and maintenance**

When your rewards drive actions that are in line with your targets, everyone shares in the satisfaction of the progress they are making. What a great problem to have - payroll bonuses that are larger than planned because you are regularly exceeding your goals!

Benefits

Monetary rewards only go so far, and if that's all you and your employees focus on you'll lose them the minute a competitor offers \$1 more than you. However, the evolving field technician cares as much about the workplace culture and the non-monetary benefits that enhance their job and their lives.

The benefits you offer need to be a match to the individual as you are likely working in a diverse talent pool. For example, the last 20 years have seen dramatic growth of women in the industry - both as business owners and technicians. In a traditionally male-dominated industry, the

introduction of female technicians has opened a wide new opportunity.

Look for ways to recognize employees for their achievements, formally and informally. And even if your organizational structure is relatively flat, there should be opportunities to give members of your team a chance at leadership. Nobody needs a title to be a leader. They need your encouragement and support.

Vehicles

Vehicles represent a branding opportunity as well as a perk to field technicians. Technicians with safe, modern, well-equipped vehicles in good repair can take a sense of pride in their workplace. Most technicians are expected to represent the organization in proper, professional uniform. Providing vehicles that are equally professional in condition and appearance demonstrates a respect for their working environment as well as concern for their safety.

And as mentioned above, a technician that reciprocates and shows respect for the business's property should be rewarded, since they are ultimately saving the company money through care and maintenance.

Devices

Providing the right tools for the job isn't really a perk, it's essential. When they were only high-end mechanical and electrical measurement devices, it was common sense.

Now the productivity tools in the field include tablets and smart-phones. And because the

employee probably already carries a phone in his/her pocket, some businesses look at that as a place to save money. But depending on an employee to provide the necessary tools is a short-sighted move.

The lifeblood of the connected home we are installing and maintaining today is the smart device. They are necessary for testing the systems, field productivity and demonstration to the homeowner. It serves as a statement of how much you care about a job well done.



Many of these functions can be satisfied using only a low-cost, low-end tablet with wifi and minimal requirements, where others require a high end iPad with a cellular connection. Take the time to identify your needs and plan for future growth.

In your planning, you need to carve out a budget for maintenance, upkeep and upgrade. These devices, while more robust in their capabilities than tools of the past, are not nearly as indestructible. Protect your investment. Don't bother with cheap phone cases. A good, protective case is worthwhile insurance. The devices WILL be dropped in the field.

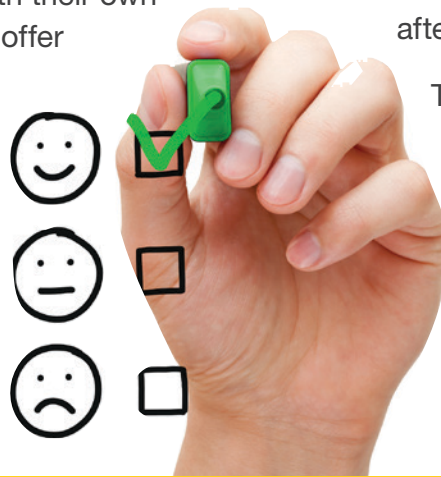
The key takeaway here is that technicians that are provided the best tools and devices tend to be more productive, gain more satisfaction from their job, and have more pride in their company.

Keeping the Tools Sharp

Beyond training on new technologies, field technicians want to stay on top of their craft. Offer a place to practice and learn on equipment at the office. A demo install, for instance, can not only benefit an individual by honing their skills, but you may find the team stays more engaged, sharing tips and helping each other.

Better yet, provide the team with their own system and as an added perk, offer nominal or no-cost monitoring.

Not only will they get first-hand experience that will help them relate to your customer, they'll also gain practice in troubleshooting integration issues, giving them more confidence.



Non-Technical Training

The demand and expectation for customer facing skills is getting higher. Your hiring process should take into consideration an aptitude for the customer experience, but you must also provide training on those customer relation skills.

And the need is high - your field technician must be able to relate to all levels of customer ability - from someone that cannot work the television remote, all the way to an IT professional that will challenge the installer at every step.

A good place to start is to look within, and find internal staff that can coach others on how to create a great customer experience. It can be, after all, your biggest marketing tool.

The importance of guiding the end user-experience cannot be understated - your technician's ability to show the customer how to use the system, and give them the confidence to continue after the install, will reflect on customer satisfaction, their testimonial and referrals, and ultimately, your success.

Field technicians have evolved into well-rounded team members that are as concerned with their experience on the job as much as a paycheck. Clear goals and incentives, the right tools and resources, along with proper training, all support an atmosphere for growth, both personally and professionally. What you put in place for your team is a reflection of your values. When the values align with those of your most qualified employees, they will be fulfilled in their job and attracted to stay.

In fact, creating a culture that is attractive to quality team members is a competitive advantage that will see you through any change the industry throws your way.

ADDITIONAL RESOURCES

We have additional information available on building, growing and eventually selling a high-value business. To help you identify best practices and be prepared for what future partners are looking for, take time to review our white paper library, including **The Acquisition Handbook** and **Transforming Your Company into a High-Value Business**.



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