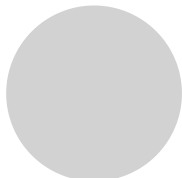
 Energy provider Just now  
Hi Claire, your operative is on the way to you now...

 [Redacted text]



localz

# Customer communication templates

Enhance customer experience and reduce chase calls around water, energy and smart meter appointments.

# Customer communication templates

Effective day-of-service communication means sending the right message, at the right time, via the right channel. With this in mind, we've pulled together some templates to keep customers in the loop before, during and after utilities appointments.

## YOU'LL FIND TEMPLATES FOR THESE EVENTS

- Job is created →
- Prior to the appointment →
- Job details change →
- Morning of the job →
- Technician is assigned →
- Technician is on their way (SMS) →
- Technician is on their way (landline) →

- Technician is approaching →
- Technician arrives →
- Job not completed →
- Job completed →



# When the job is created

Send customers a notification when the job is created. Think about which details you'd like to include, and include options to self serve additional information.

## DATA YOU'LL NEED

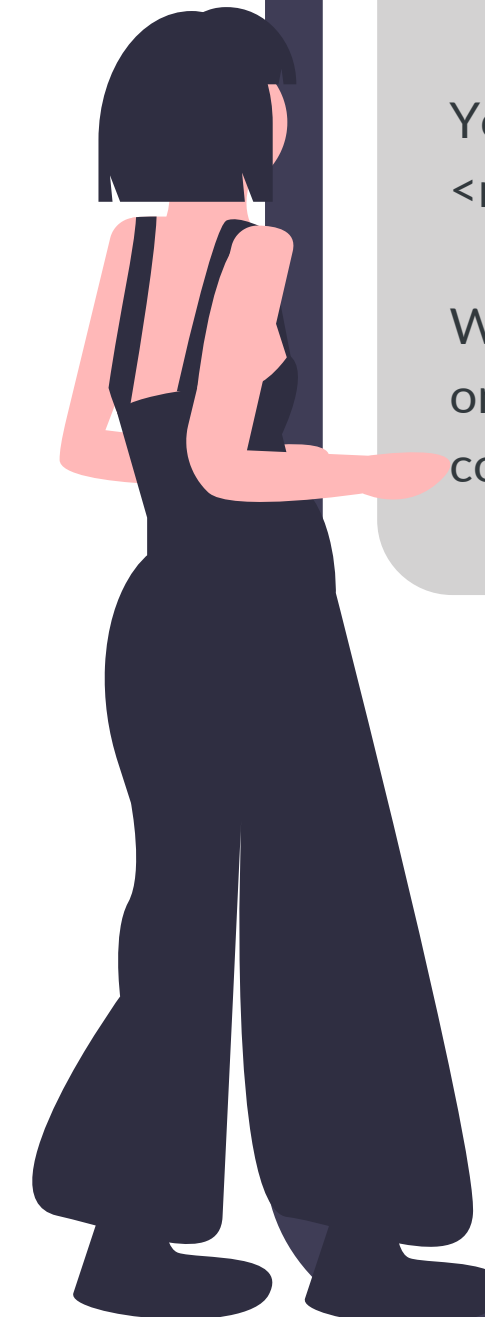
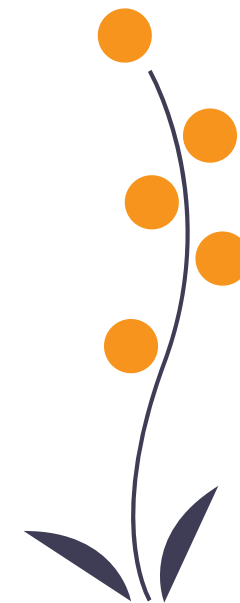
- Unique appointment number
- Mobile number, email or landline
- Appointment address
- Expected job date
- Job status

## YOU MIGHT LIKE TO INCLUDE...

- Contact options or link to customer portal
- Customer name



Localz customer engagement tools automatically pull job and event data from existing systems into workflows and messaging.



Today • 9:54

Hi <name>, your  
<appointment\_type> has been  
scheduled for <date> between  
<start\_time> and <end\_time>.

Your reference number is  
<number>.

We'll send your 1 hour time slot  
on the day. View details here to  
confirm or reschedule: <link>.

# Prior to the appointment

Send reminder notifications on the days prior to the appointment. Schedule these for a time that will be convenient for the customer and allow them to prepare.

## YOU MIGHT LIKE TO INCLUDE

- Appointment type
- Expected appointment time window
- Operative name (if job is allocated)
- Appointment-specific information
- Contact options or link to a customer portal



# When job details change

If job details change, such as scheduled appointment time or date, you can send an automatic notification with these details to keep customers informed.

## YOU MIGHT LIKE TO INCLUDE

- New expected job date
- New job status
- Contact options or link to customer portal
- Customer name



Today • 9:00

Hi <name>, your appointment has been rescheduled for <date> between <start\_time> and <end\_time>. We are sorry for any inconvenience.

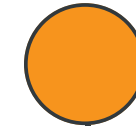
If this is not suitable, please let us know on XXX XXX



It's not always possible to provide a highly accurate ETA window days in advance.

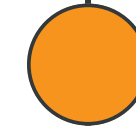
We recommend a "shrinking ETA window." That means communicating what you know, and sending an update when you know more.

Here's an example...



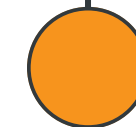
### **BOOKING IS CONFIRMED**

Provide a **three-hour window** for the upcoming job.



### **MORNING OF THE JOB**

Provide a **one-hour window** when the customer can expect the technician.



### **OPERATIVE IS ON THE WAY**

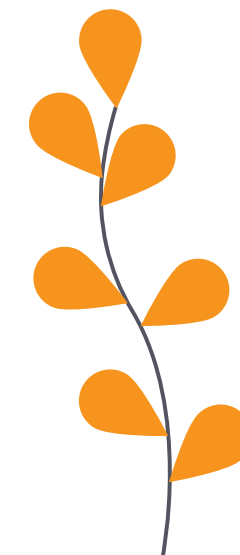
Send an estimated **fifteen-minute window** for arrival time.

# The morning of the job

Trigger a reminder notification on the morning of the scheduled appointment date. Offer easy ways to contact your support team with additional information.

## YOU MIGHT LIKE TO INCLUDE

- Expected appointment window
- Contact options or link to customer portal
- Customer name
- Appointment-specific instructions



Today • 9:03

Hi <name> your <job\_type> <job\_number> is scheduled for today between <start\_time> and <end\_time>. View details here: <link>.

You'll receive another SMS when your technician is on the way.

# Technician has been assigned

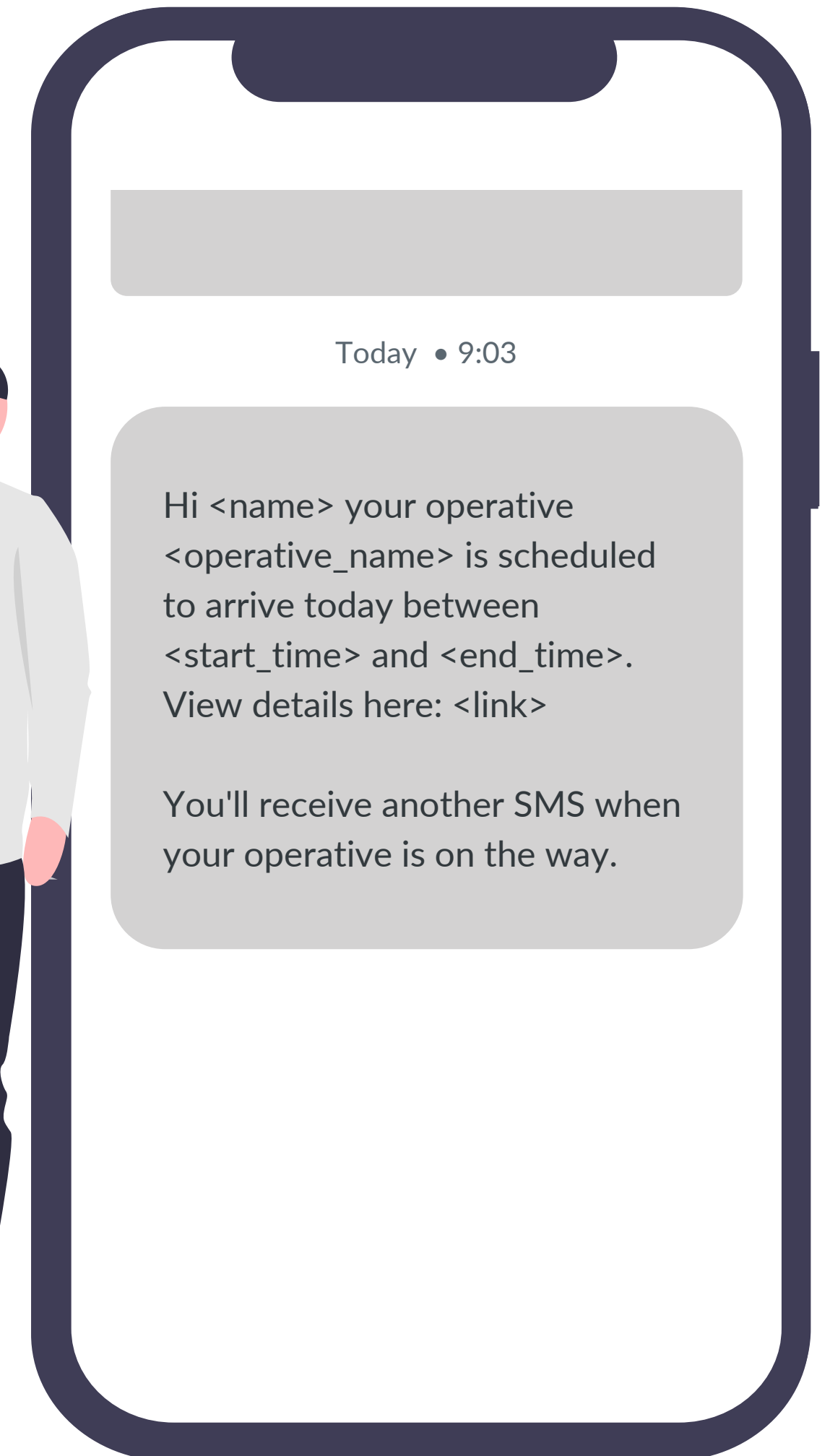
To reassure customers and increase operational transparency, you might like to trigger an alert when a technician is assigned to their job.

## DATA YOU'LL NEED

- Job details with updated technician information

## YOU MIGHT LIKE TO INCLUDE...

- Expected appointment window
- Contact options or link to customer portal
- Customer name
- Technician details





# Technician is on the way (SMS)

Let customers know that the technician is on their way. Provide an ETA either as a window, a specific time, or a number of minutes.

## DATA YOU'LL NEED

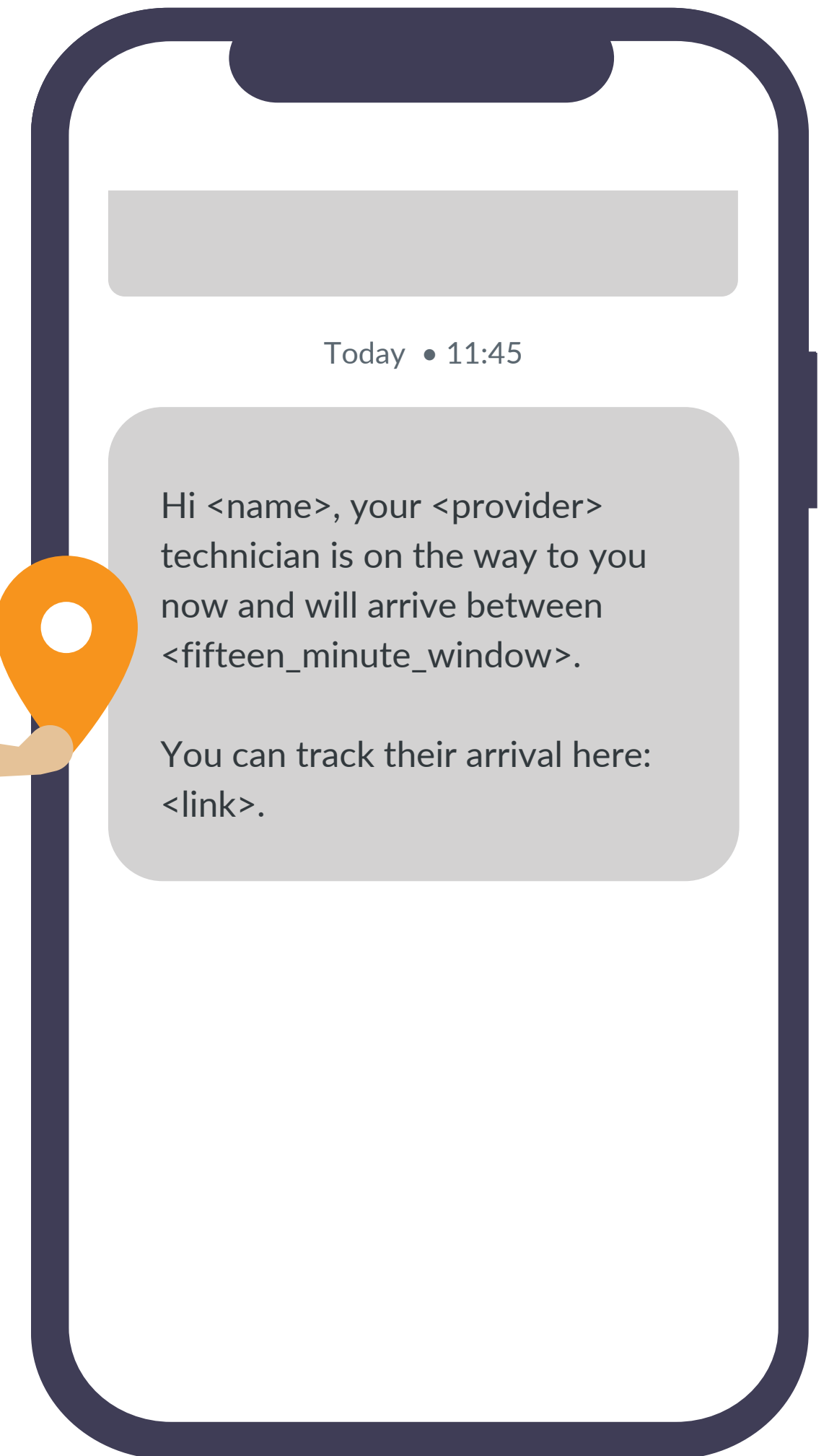
- 'On My Way' signal from status update or location trigger
- Real-time tracking and travel information
- Customer's address for ETA

## YOU MIGHT LIKE TO INCLUDE...

- Estimated time of arrival (ETA)
- Contact options or link to real-time tracking



Localz technology uses location data from technicians' mobile devices, enabling real-time tracking and accurate ETAs.

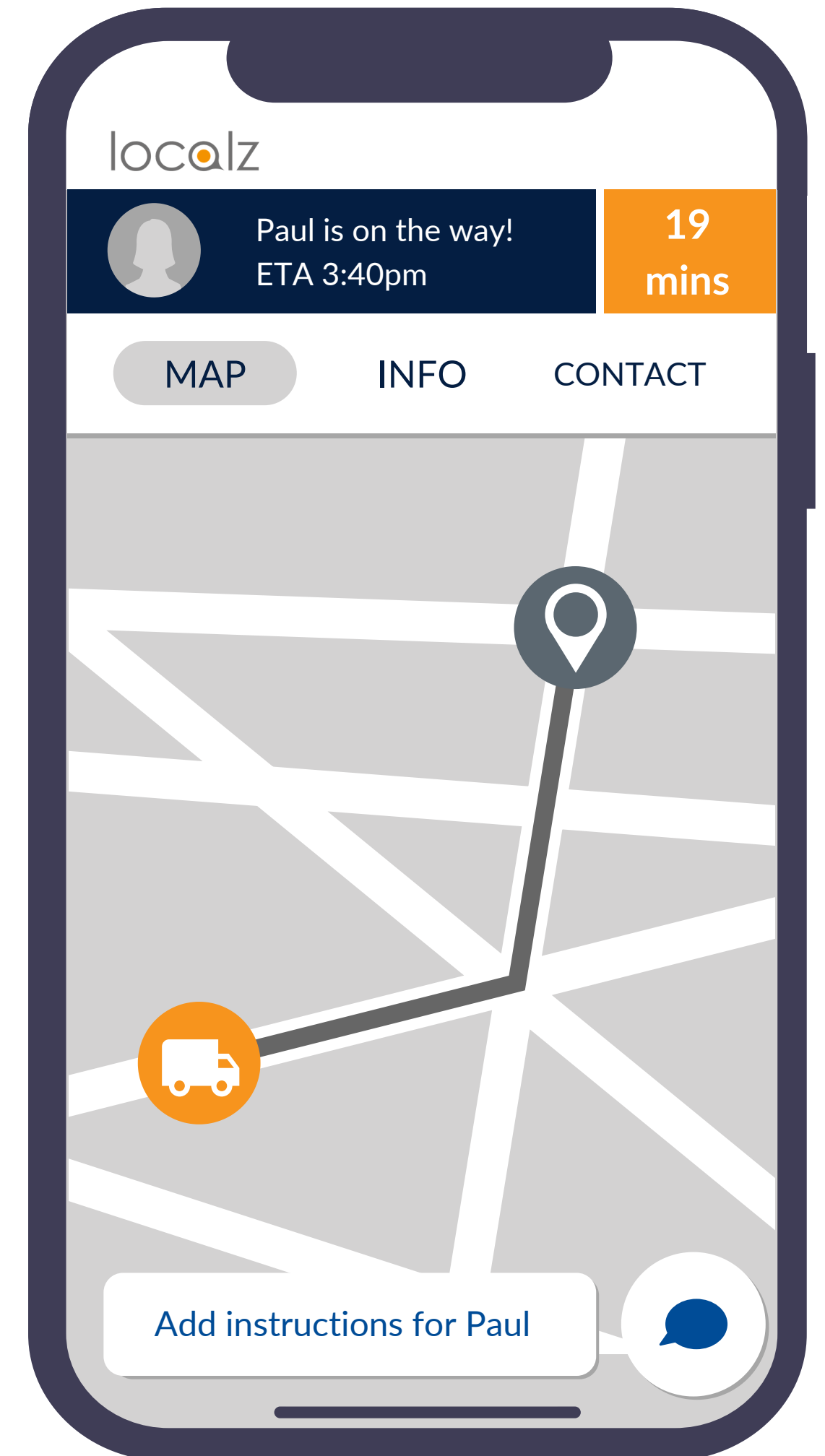




## Why not reduce no-access visits with real-time tracking and job updates?

With Localz Manage My Appointments web portal, you can include a link to a live map that enables the customer to track the operative's arrival.

You can also provide additional job info, technician details and contact options - including two-way messaging.



# Technician is on their way (landline)

If the customer has provided a landline, you can trigger a phone call with an automated voice message detailing the technician's specific ETA.

## DATA YOU'LL NEED

- Customer's landline number
- Location and travel information for ETA
- Customer's address for ETA

## YOU MIGHT LIKE TO INCLUDE...

- Alternative message for if an answering machine is detected
- Interactive voice responsive options to contact support



"Hi, this is your <provider>, calling to let you know that your technician is on the way and is expected to arrive between <fifteen\_minute\_window>

If you'd like to share any important information with the technician before they arrive, please press 1."

# Technician is approaching

Allow the customer to reply, so that they can share important information. The technician can receive the contents of the reply as an SMS or through an app.

## EXAMPLES OF MESSAGES FROM CUSTOMERS

- "I'm at local shop but will be back by 3.15"
- "Please wait 5 mins after knocking, I'm slow on my feet"
- "I'm in the garden so please use the side gate"



With Localz Chat My Way, customers can send a message to the technician via a secure web-based portal.

Alternatively, customers can reply to SMS notifications, with replies routed directly to the technician or to support staff.



# Technician is about to arrive

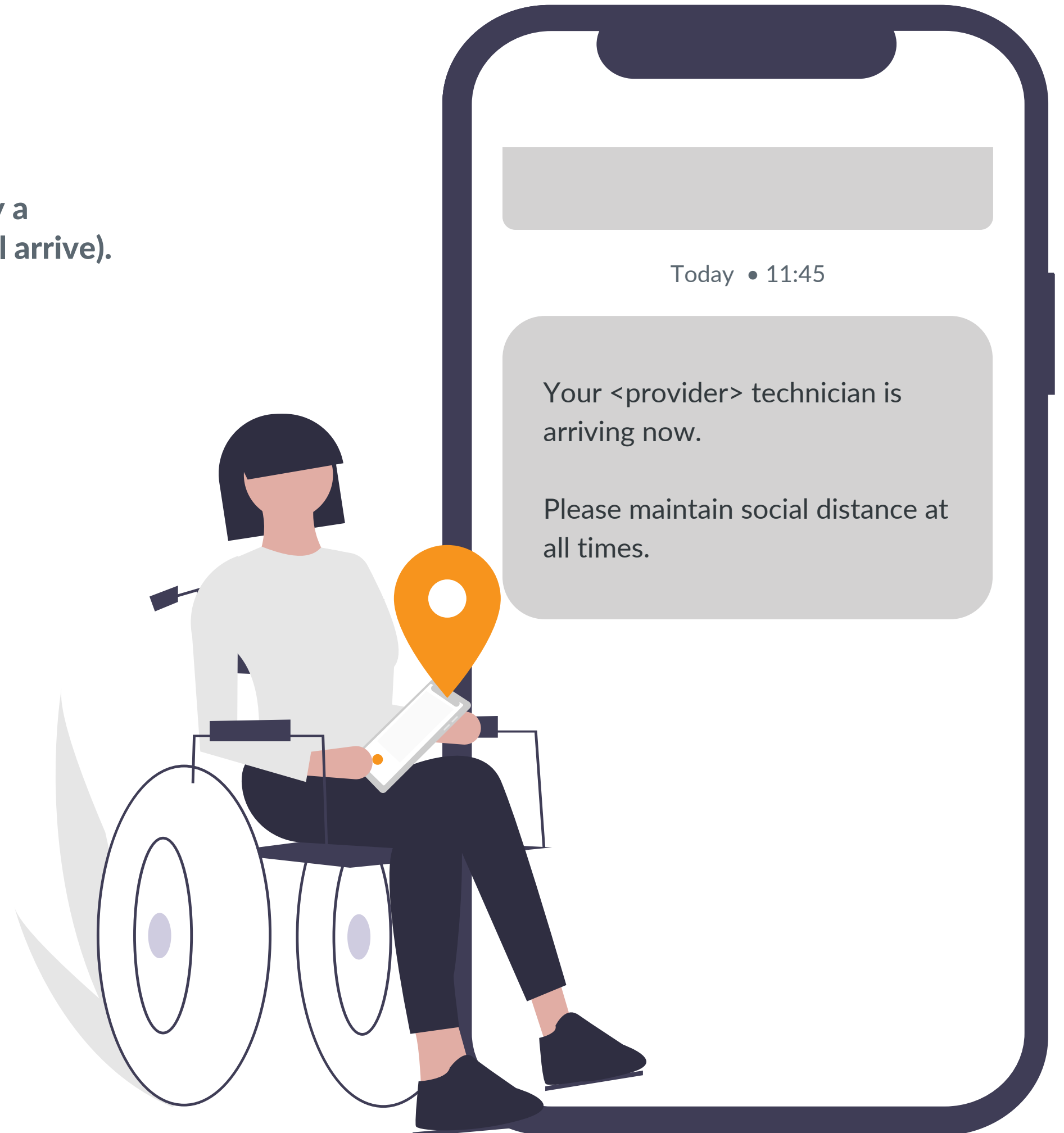
Send a message just before the technician's arrival, triggered by a Geofence or a Timefence (based on how soon the operative will arrive).

## DATA YOU'LL NEED

- Operative location for tracking
- Real-time tracking information
- Customer's address for ETA

## YOU MIGHT LIKE TO INCLUDE...

- Estimated time of arrival (ETA)
- Contact options or link to real-time tracking



# Job could not be completed

Send a message when the technician cannot complete the job for some reason - for instance, if it was unsafe to proceed.

## DATA YOU'LL NEED

- Update to the job status

## YOU MIGHT LIKE TO INCLUDE...

- Specific job details
- Reason for failure e.g. unable to gain access
- What will happen next



Today • 11:45

Hi <name>, we visited today but were unable to complete your job <job\_number> due to <reason>. Please call us on XXX XXXX to reschedule.

# Job is complete

Send the customer a notification message upon job completion, including a link to a feedback form so customers can share honest feedback.

## POSSIBLE TRIGGERS

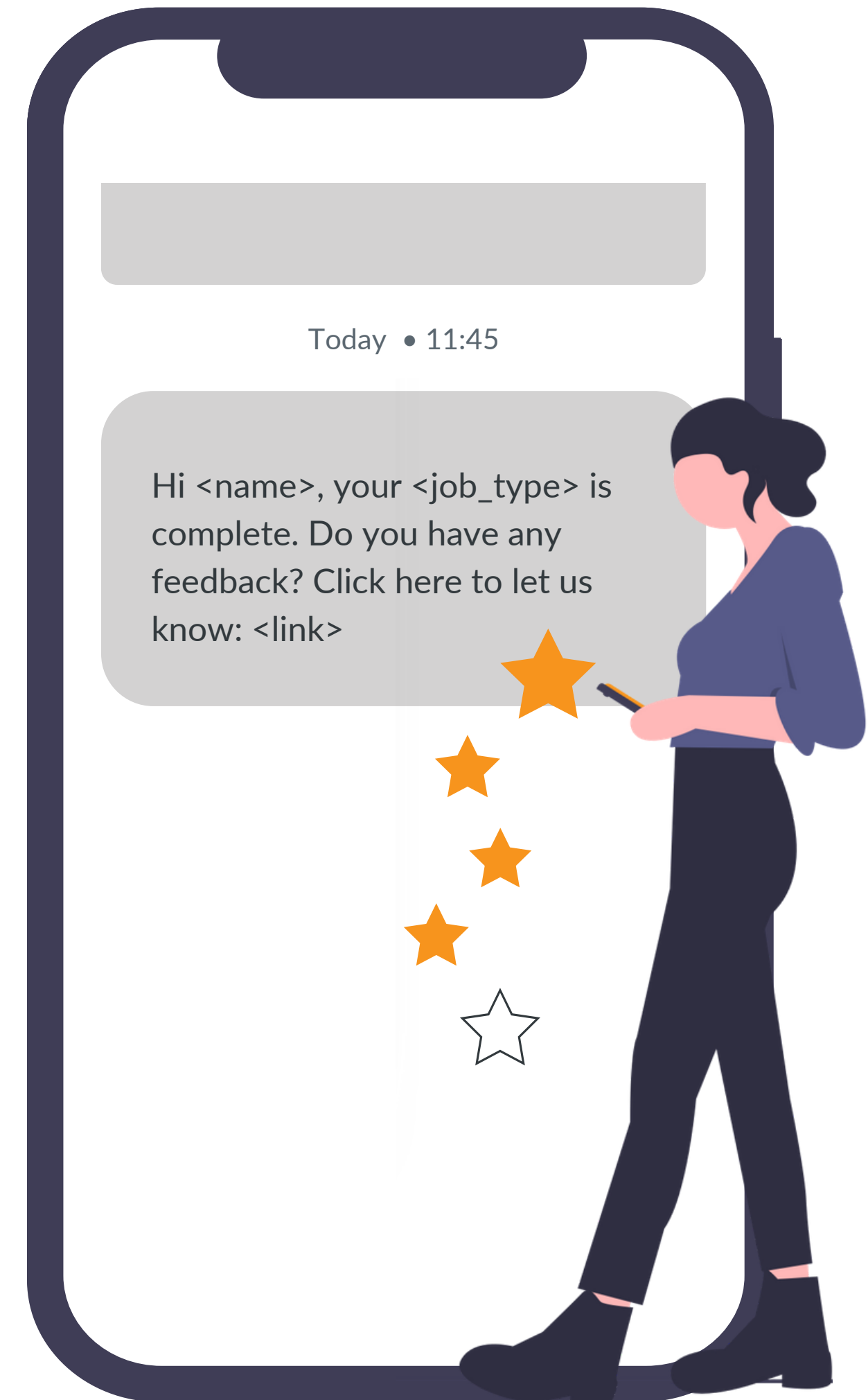
- Job status is updated
- Technician marks job as complete
- Technician leaves job's geolocation
- Technician starts their next job

## FEEDBACK CONSIDERATIONS

- Which questions will you ask?
- How soon will you send the request?
- Is a follow-up appointment required?
- Who will you notify about poor feedback?



Localz allows you to request feedback within minutes of a completed appointment, and trigger real-time negative feedback alerts to office staff.





With highly configurable workflows and smart location tracking, Localz helps utility providers and contractors to send the right message at the right time.

Mix & match Localz out of the box applications, or integrate our location and communications SDK's into your own enterprise solution.

**Get in touch**

[hello@localz.com](mailto:hello@localz.com)



### **On My Way**

Real-time location tracking and customer notifications.



### **Manage My Appointments**

White-labelled customer portal with map and technician details.



### **Manage My Workforce**

Management dashboard provides real-time visibility for office staff.



### **Chat My Way**

Two-way communications between the customer and operative.



### **Rate My Experience**

Dynamic feedback forms and negative feedback alerts.



### **Manage My Day**

Mobile workforce app to complete jobs and automate communication.