



BEST PRACTICES

7C's

12/2020

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Introduction

One of the key processes that are carried out every week in your franchise operations, is Invoice completion by the technician. Ensuring that you are converting 100% of your pending invoices to completed and posted invoices, is a key business process that delivers the revenue that you are entitled to from your customer base.

There are many reasons why invoices might not get completed but having the 7C’s in place will go a long way in making sure that you are achieving that objective. Additional benefits of utilizing the 7C’s, is that your routes will become *self-explanatory*, meaning, if an employee knows how to deliver the Sani service, then having the 7C’s in place will allow *any* technician or operations manager run that route effectively.

The 7C’s

1. Correct Route	Ensuring the customer is on the correct route, will ensure that the customer is served by the same technician all the time and that route is effectively loaded, balanced and routed. The objective is to NOT have technicians passing each other, Routes should be geographically sequenced.
2. Correct Day	Arriving on the correct day and more importantly, always arriving on that same day of the week, builds a routine with your customers, so that they know that the uniformed technician (<i>with the red box</i>) is always here on Tuesdays (for example). This in turn makes you a part of their week and their process. Continually changing or shifting routine service is not advised.
3. Correct Stop	Sequencing your stops ensures that the technician is driving in an optimum order, arrives at the correct accounts during the preferred service window times (example: arriving at a restaurant when it is not lunchtime). This sequence will again build that routine with your customer and make your technician happier that they are completing their work efficiently.
4. Correct Contact	Ensuring the customer service address, the contact full name and phone details are critical. This allows the technician to know where they are going (and can GPS the address if lost), know who they are meeting (so they can greet them by name) and call them if they are unable to service the account. Building that name greeting familiarity, adds that personal touch to our service-oriented business.
5. Correct Details	Customer Terms, Tax Rates, Tax Codes, Default Delivery Method, Preferred Send Method, etc., ensures that the technician is creating an invoice that will be easily collectable and not disputed due to incorrect information.
6. Correct Pricing	Correctly priced Items is of paramount importance to you and your customer. Having this in place will reduce billing disputes and ensure that you are delivering the revenue to your franchise, with minimal review.
7. Correct Notes	The grand – daddy of the 7C’s. Now that your technician has made it to the customer on the correct day and time, was able to greet them by name and has an invoice / work order that is correct, having work instructions (or route notes) is of vital importance. Route Notes ensure that the technician knows what to do while onsite, ensuring that products and services are delivered as prescribed; all rooms and fixtures are looked after; and any special access codes or routines are adhered to.

Having this all-in place, will essentially allow *anyone* that has been trained in our service protocol, run any route. Imagine what this does for your business for vacation coverage, employee sick days, new staff on-boarding and emergency substitution for unscheduled terminations.

RSO – 7C's

RouteStar Online (RSO) and the 7C's

Correct Route

Correct Day

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