



Efficiency at Every Stage:

Scaling Smarter with Integrated Software

Presented by:



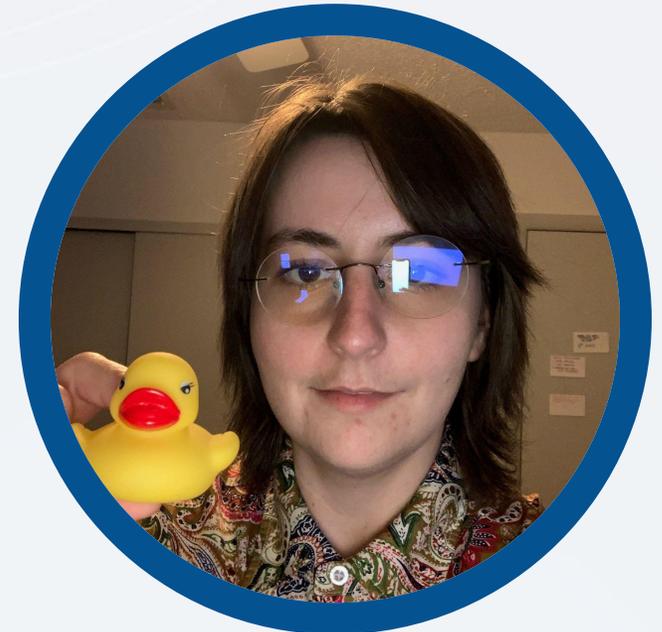
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Asking "What is the purpose of this step in this task?" is the crucial first move toward either automating or eliminating it.

-Simy DeCotret, Rentokil

The Paperless, Automated Office

The first thing to eliminate – paper!



Digital Forms: Digitize all agreements, checklists, and WDO forms, emailing them directly to the customer from the office or field.



New Account Setup: Using Sales Center, you can quickly add sold services to a Location through the Closed Won Queue.



Service Order Generation Automation (Coming in 2026): Automatically schedule future work and email payment plan invoices upon generation or on the bill date.



Automated Invoicing: Instantly send inspection reports or invoices upon service completion, including an **Epay** link for fast payment.



Need more? Our APIs might be the solution



“Sales Center streamlines everything.”

-Dylan Blasingame,
Blasingame Pest Mgmt

[DOWNLOAD CASE STUDY](#)

A Subscription for Success

Strategically bundle services to secure recurring revenue streams.



Subscription Models (The Gold Standard)

- Push quarterly or monthly recurring billing.
- Avoid one-times to discourage churn (unless priced at a significant premium).

Tiered Bundle Packages:



Silver:
General Pests
(Ants/Spiders) -
Exterior Only.
(Fastest to service).



Gold:
General Pests +
Rodents.



Platinum:
General Pests +
Rodents +
Termite/Mosquito.

74%

of successful pest companies in the US
thrive on a recurring revenue model.



Bundle offerings in PestPac:

Making account setup quick
and easy.



Payment Automation

Ensure seamless, daily
automation of all credit card
and ACH transactions to
streamline cash flow.

Automating the Touchpoints

Don't waste your staff's valuable time making phone calls about appointment reminders!

The "Uber-ization" of Service



3 Days before service:
Automated email/SMS reminder of service using CNA.



24 Hours before service: Automated SMS confirmation request.



While En Route:
Send an automated text to significantly reduce no-shows & "where is my tech" calls.
(Tech Tracker coming in 2026!)



Post-Service:
Completing the service on mobile can trigger an inspection report an/or review request via email.

The Benefit:

- ✓ Reduces office call volume
- ✓ Increases customer retention by providing transparency.



of service businesses report that texting for appointments is their **#1 source of administrative time savings**

Minimizing Windshield Time



Drive time is unproductive, wasting fuel and generating no revenue.

Strategy: "Tight Routing" & Zoning



Assign technicians to **specific zones/zip codes** for high Route Density. (Dense Routes coming soon to RouteOp!)

Shift to "Slot-Based Scheduling"



Customer Preference

Slot-Based with BestFit

Transitioning from Customer Preference to using **BestFit** to offer specific service windows when already in the area.

Best Practice: The "First Stop" Rule



First job should be **closest** to the technician's home to start the billable clock sooner.

20%-30%

Route optimization significantly improves operational efficiency for fleets by 20-30%.

Maximizing Tech Time



The Challenge

A 2025 Salesforce survey of 350 technicians and tradespeople reveals that admin tasks consume 30% of working hours—more time than the 29% spent delivering actual services.



Streamline Documentation

- Voice-to-text note dictation eliminates manual typing
- Photo uploads provide instant visual documentation
- Standardized drop-down menus with pre-built comments & chemical tracking to ensure consistency & compliance



Eliminate Unnecessary Site Visits

- Smart traps remote monitoring to track rodent activity 24/7
- Threshold alerts notify teams only when pest activity is detected
- Service calls restricted to active sites only - no more “empty checks”
- Reduce fuel costs while maintaining customer protection



Prevent Revenue Loss

- Mobile check scanning captures payments immediately
- Digital payment processing reduces lost or delayed payments
- Real-time transaction tracking improves cash flow

The Result: More time serving customers, less time on paperwork and unnecessary trips.

Communication Center

One Screen. Every Channel. Zero Context Switching.

The Communication Center consolidates all customer interactions into a single interface, eliminating the need to toggle between multiple PestPac screens.

The Impact:

CSRs spend more time solving problems and less time juggling software and busy work

Omnichannel Communication Hub

-  Handle emails and SMS side-by-side with customer accounts
-  Respond to customers instantly without switching applications
-  Respond via SMS immediately—no phone tag required

Instant Customer Intelligence

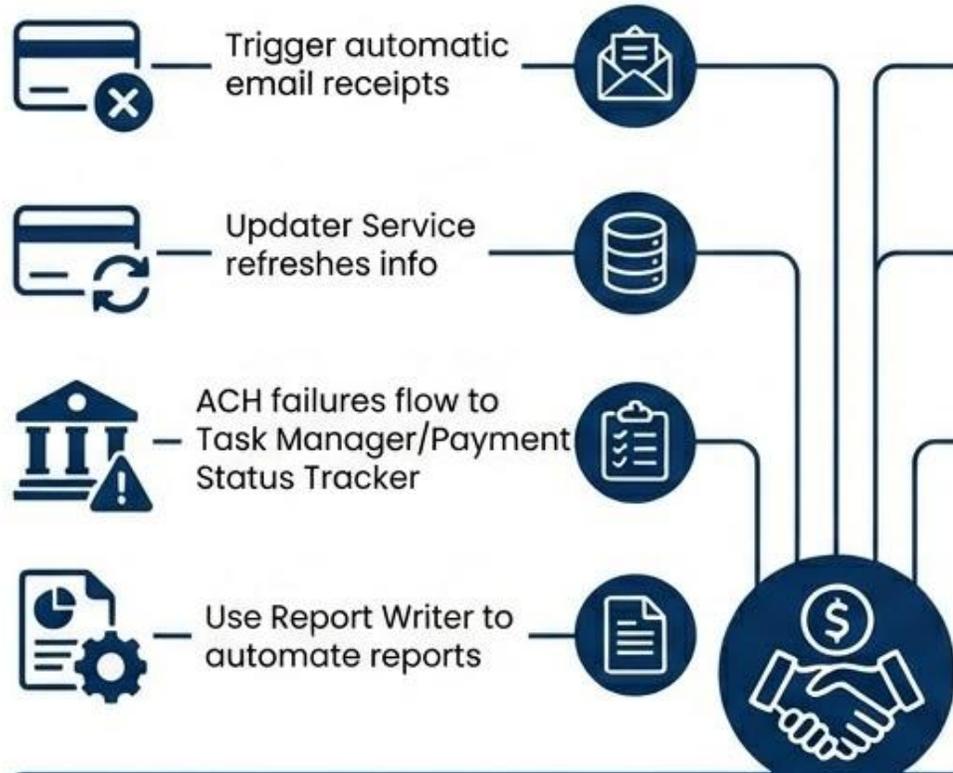
-  Automatic summarization of every conversation
-  View recent service notes without navigating away
-  Access complete customer history in one view



FEWER CLICKS
for emails

AR & Collections: Automate Payment Recovery

Handle Payment Failures Instantly



Proactive Collection Tools



“We were able to reduce monthly collections by 10%, dropping from 28% to 18%, simply by adding automated messages.”

-Emily Curtis,
Miller Pest Solutions

The Bottom Line: Don't chase your money—let automated workflows recover payments while your team focuses on customer service.

"We've found there's a fine balance with customer touches, if we contact **too often**, people begin to **ignore the messages**; but if we wait **too long**, they **forget** they have a balance due. We've seen strong improvements with weekly automated texts, combined with one manual call and sending ePay links."

-Emily Curtis, Miller Pest Solutions

Stay Efficient by Tracking KPIs

KEY PERFORMANCE INDICATORS



Technician Utilization Rate

- Using the Route Comparison Report, measure how much of a technician's time is spent actually working on jobs versus downtime like waiting or traveling



Collection Rate / Days Sales Outstanding (DSO)

- Measure accounts receivable efficiency; critical for cash flow
- $DSO = (\text{Accounts Receivable} / \text{Total Credit Sales}) \times \text{Number of Days}$
- Target: 30-45 days



Callbacks

- Using Business Analytics, find out which techs cause the most callbacks.



Work Order Completion Rate

- Using Business Analytics or Report Writer, track which techs aren't on track for finishing their route for the month
- Completion rate = (Completed orders / total orders) within a specific time frame
- Anything below 90% indicates workflow trouble

“Companies that track KPIs have 20% higher customer satisfaction levels & 15% higher tech productivity levels”

**If you don't measure it,
you can't improve it!**

Effective Measuring



Call Center KPIs:

"Your call is very important to us."

Rotation of Metrics

- First Call Resolution
- Average Handle Time
- After Call Work

Measure the Unmeasurable

- Cancel save retention
- Sentiment analysis
- Customer feedback

Internal Coherence is Efficiency

- Your customer service team is on the same team as you!



Take Every Opportunity To:

Automate Reporting and Processes

- Many available tools: ReportWriter, Wavelytics, API
- Reduce reliance on people in favor of process

Document Process

- Having to think about what to do next kills efficiency.
- Inconsistent process kills efficiency.
- You can't automate your steps if you don't know what they are.

Make Efficiency Easy

- Don't overburden categorization at point of data entry.
- The process serves the objective, don't let it get in the way of the objective.
- If the people don't see or benefit from the purpose, they won't buy in.



Questions?

Session Feedback

- Login to the Event Mobile App
- Add this session to your schedule
- Click Survey
- Give it a rating 1-5 stars

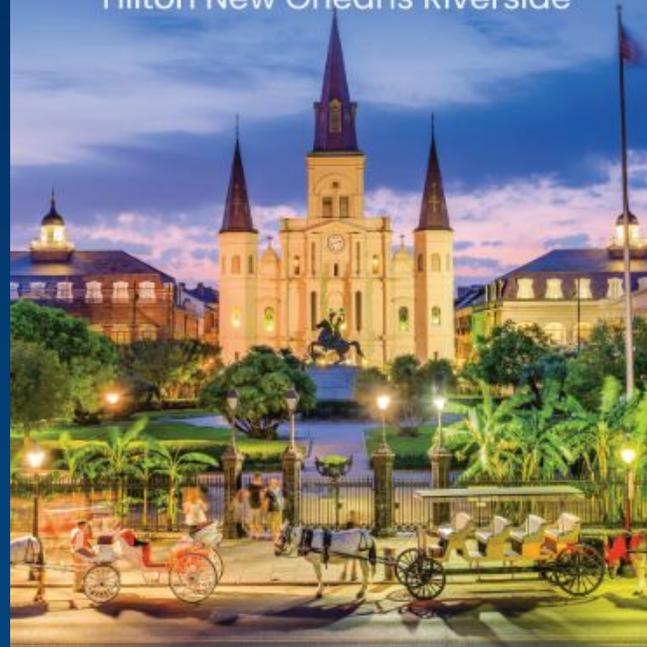
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and receive 20%
off your ticket!**

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CUSTOMER CONFERENCE '27

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Sunday, January 31, through
Wednesday, February 3, 2027

Hilton New Orleans Riverside



Appendix

Example Collection Process

Stage 1 – Normal Status (10–29 Days Past Due)

- CC decline: auto texts + emails sent
- ACH fail

Stage 2 – Normal Status (30–59 Days Past Due)

- Auto text sent weekly
- Call customer; text ePay link; email customer

Stage 3 – HOLD Status (60–89 Days Past Due)

- Auto text sent weekly
- Call customer; text ePay link; email customer

Stage 4 – HOLD Status (90–180 Days Past Due)

- At 90 days, move account to ARM
- Cancel accounts
- 180 days past due: run 180 Days Past Due Report
- Confirm cancellation
- Remove from ARM
- Write off account