



Tenant communication templates

For housing visits and repair appointments

localz

REPAIR AND MAINTENANCE

Tenant 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 help you mix and match an appropriate communication journey for your tenants.

Discover templates and data requirements 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



BEFORE THE APPOINTMENT

| 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



Expected job date



Mobile number, email or landline



Job status



Appointment address

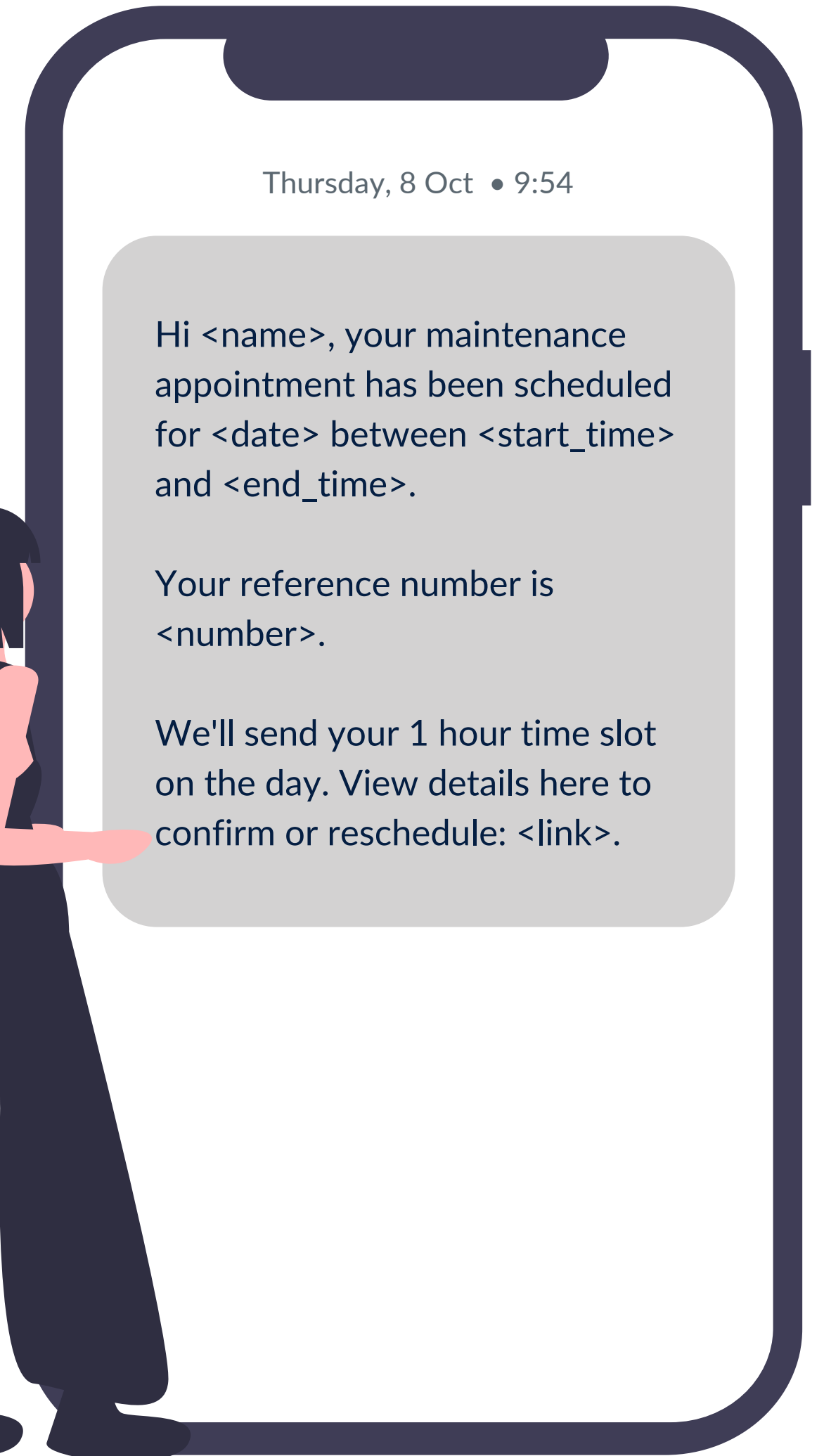
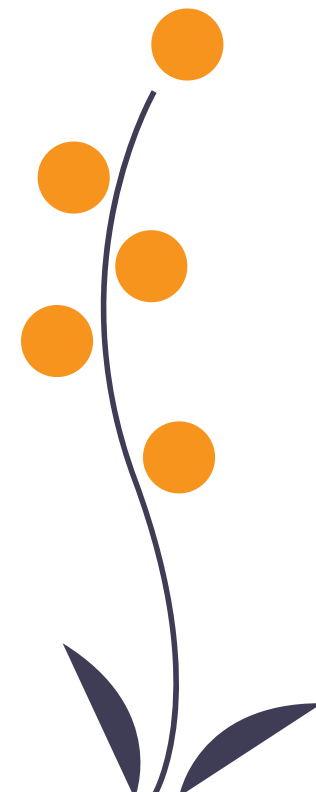
You might like to include...



Contact options or link to customer portal



Customer name



BEFORE THE APPOINTMENT

| Prior to the appointment

Send reminder notifications on the days prior to the tenant's appointment. Schedule these for a time that will be convenient for your tenant.

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 customer portal



BEFORE THE APPOINTMENT

| 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 tenants informed.

You might like to include...



New expected job date



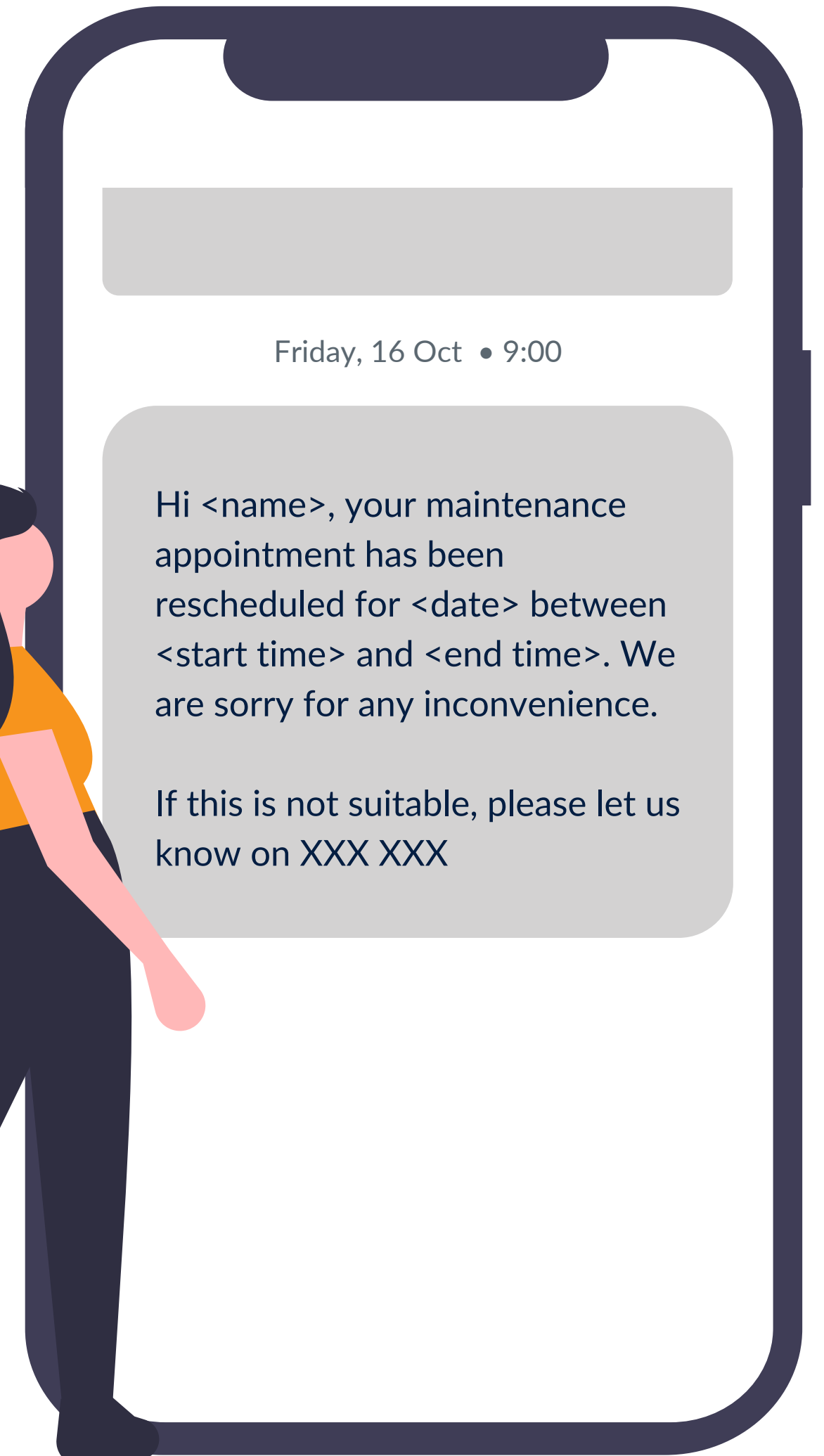
New job status



Contact options or link to customer portal



Customer name



DAY OF THE APPOINTMENT

| The morning of the job

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

You might like to include...



Expected appointment window



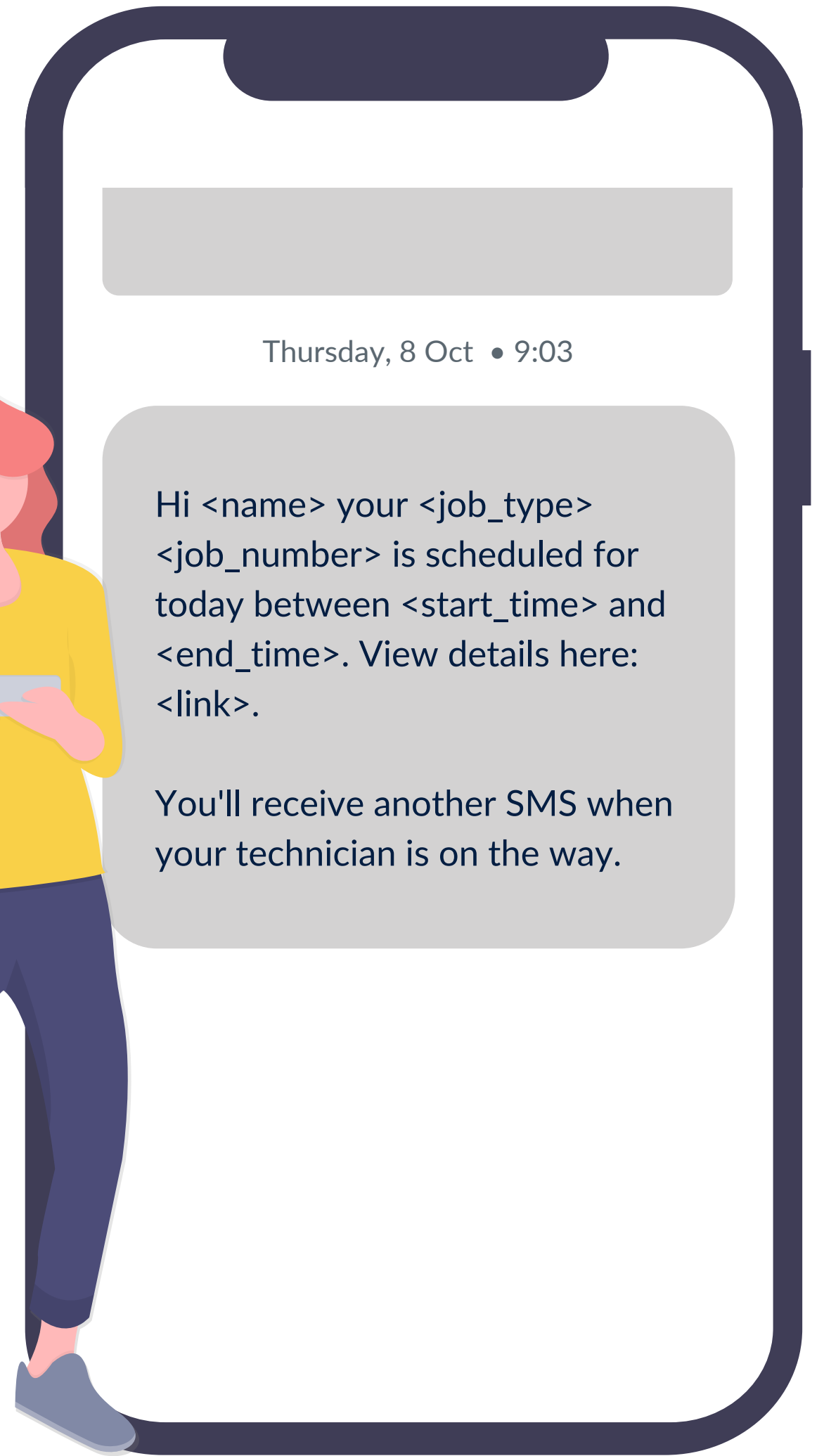
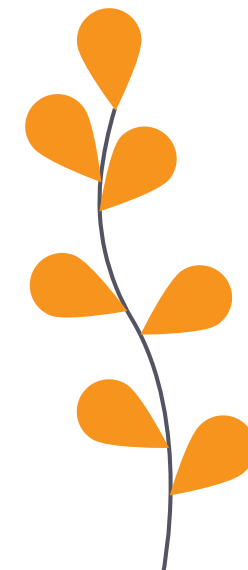
Contact options or link to customer portal



Customer name



Appointment-specific instructions



Thursday, 8 Oct • 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.

DAY OF THE APPOINTMENT

Technician has been assigned

To reassure tenants 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 updated with technician information.

You might like to include...



Expected appointment window



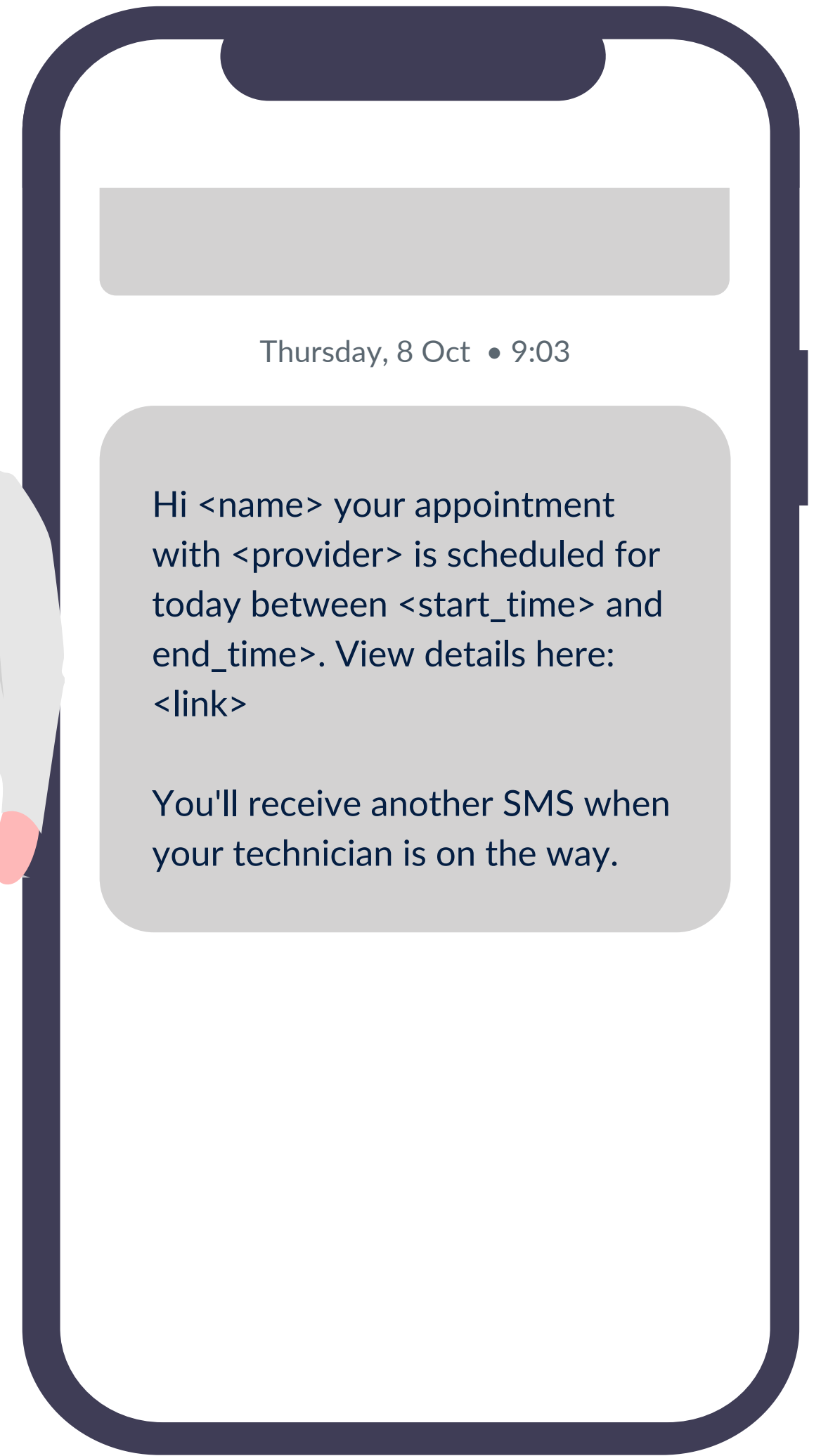
Contact options or link to customer portal



Customer name



Technician details



Thursday, 8 Oct • 9:03

Hi <name> your appointment with <provider> 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.

DAY OF THE APPOINTMENT

| Technician is on the way

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 a status update or geofence



Real-time tracking and travel information



Tenant's address for ETA

You might like to include...



Expected appointment window



Contact options or link to real-time tracking



Monday, 28 Sep • 11:45

Hi <name>, your <provider> technician is on the way to you now and will arrive between <fifteen_minute_window>.

You can track their arrival here: <link>.

DAY OF THE APPOINTMENT

"On my way" landline alternative

If the tenant 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



Tracking and travel information for ETA



Tenant's address for ETA



Tenant's landline number

You might like to include...



Alternative message for if an answering machine is detected



Interactive voice response options to contact support



"Hi, this is your <provider>, calling to let you know that your trade operative is on the way and is expected to arrive between <fifteen_minute_window>

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

DAY OF THE APPOINTMENT

| Technician is approaching

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

Data you'll need



Technician's mobile number

You might like to include...



Job details such as job number



DAY OF THE APPOINTMENT

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 and travel information



Tenant's address for ETA

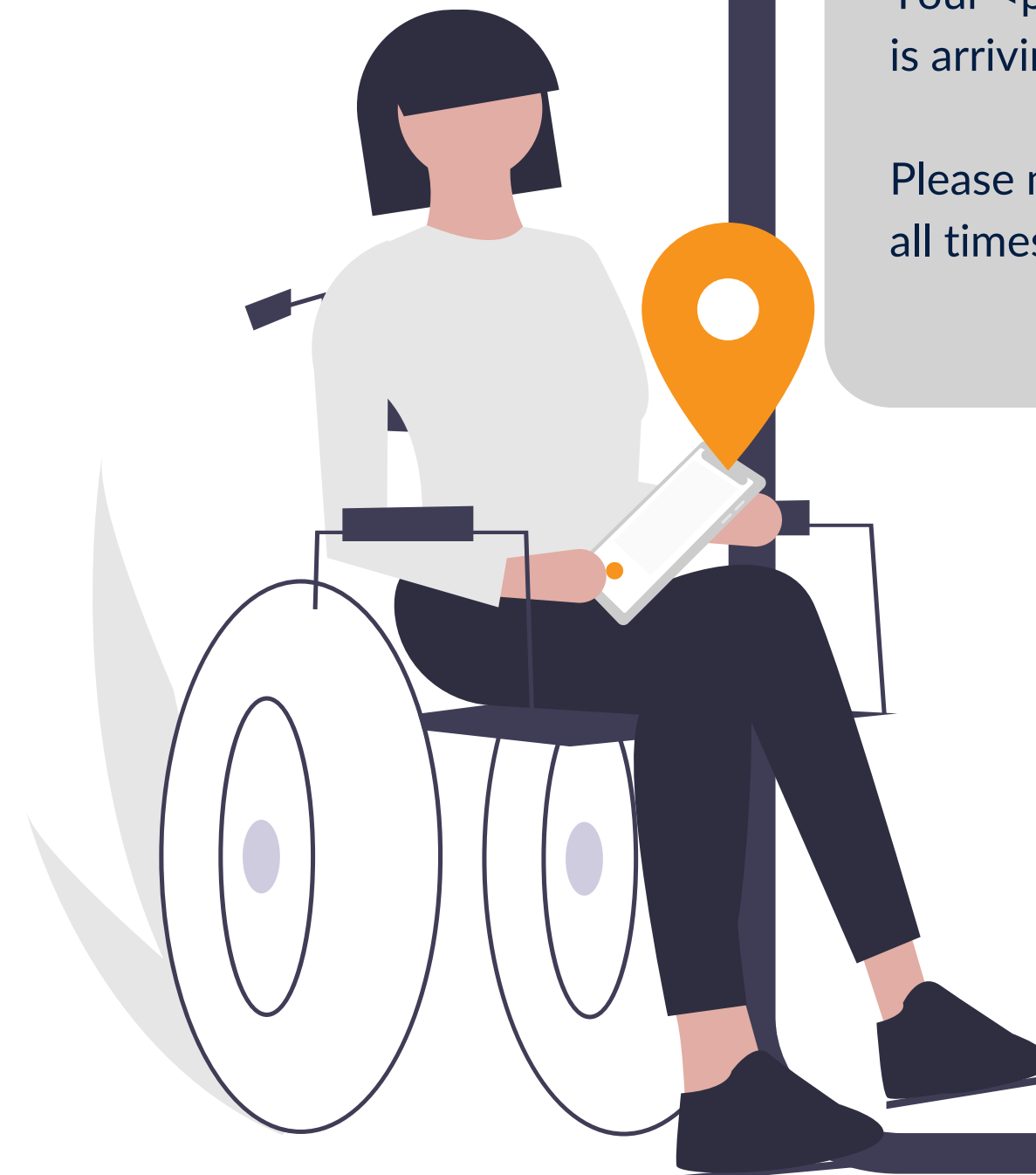
You might like to include...



Expected appointment window



Contact options or link to real-time tracking



Monday, 28 Sep • 11:45

Your <provider> trade operative is arriving now.

Please maintain social distance at all times.

AFTER THE APPOINTMENT

Job could not be completed

The customer is sent 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



Tuesday, 29 Sep • 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.

AFTER THE APPOINTMENT





| Job is complete

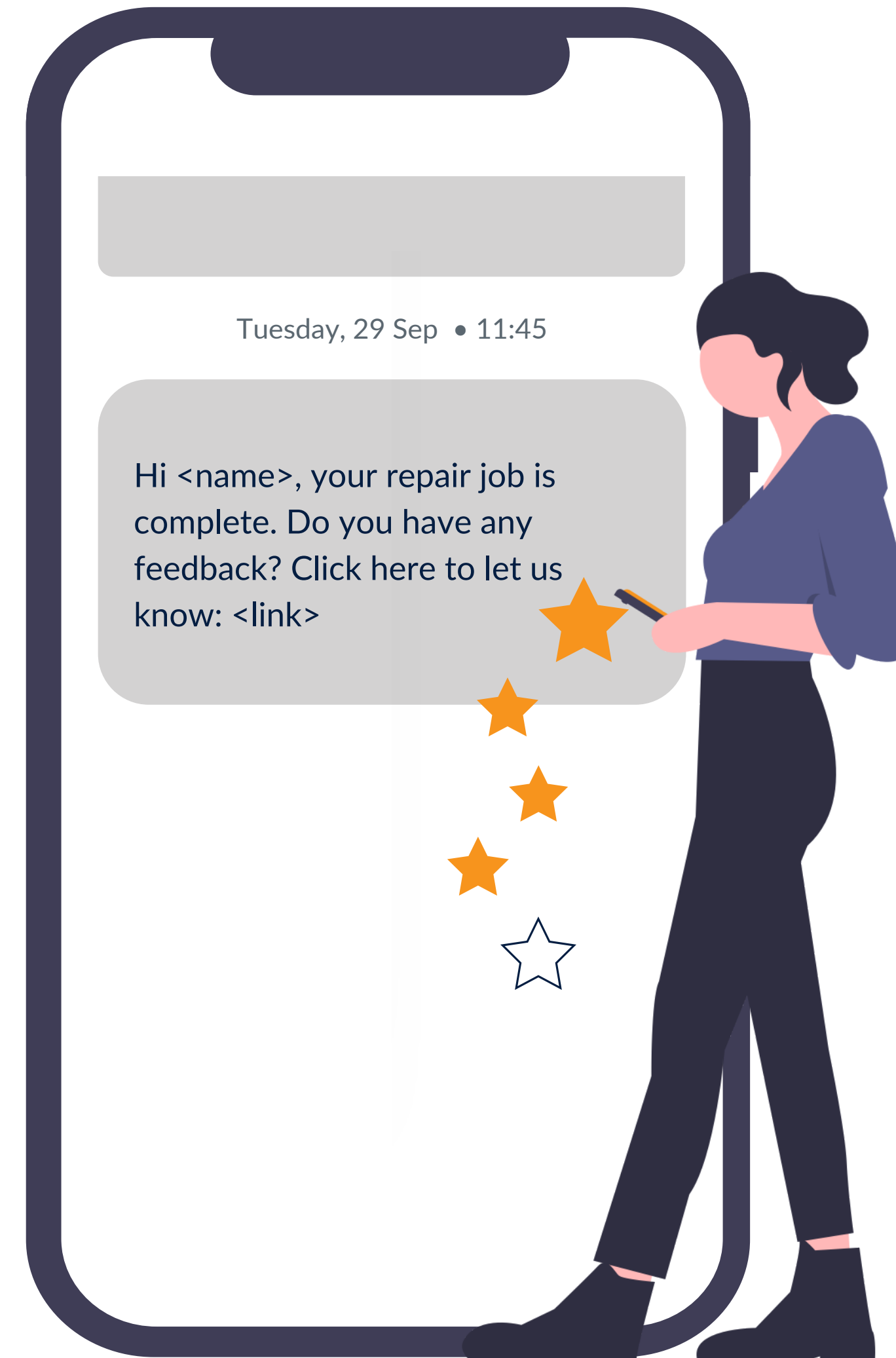
The customer is sent a notification message upon job completion, which includes a link to a feedback form so tenants can share honest feedback.

Possible triggers

-  Job status is updated
-  Technician marks job as complete
-  Technician leaves the job's geofence
-  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 of poor feedback?





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

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Get in touch

hello@localz.com



On My Way

Real-time location tracking and customer notifications.



Chat My Way

Two-way communications between the customer and operative.



Manage My Appointments

White-labelled customer portal with map and technician details.



Rate My Experience

Dynamic feedback forms and negative feedback alerts.



Manage My Workforce

Management dashboard provides real-time visibility for office staff.



Manage My Day

Mobile workforce app to complete jobs and automate communication.