dista

A GUIDE TO
MODERN DAY

FIELD
SERVICE
MANAGEMENT

CONTENT

Introduction: Understanding Field Service Management

The daily life of a technicial has changed!

Field service operations used to be much simpler. Consumers only had one device—the TV. This device stayed in the home, making fulfillment of services much more straightforward. Back then, service providers could satisfy customers with a four-hour appointment window. Today's story is much different. Service-oriented businesses face a myriad of challenges supporting the connected home, where multiple residents—each with their own set of personal preferences and multiple devices—seek access to services and support.

You got a new house and are looking to set up a WiFi connection. You zero down on a relevant vendor and a technician comes to your house, inspects your environment, comes with all the necessary parts including the router and fixes you up with the internet connection. All this in a span of 3-4 days and now you are connected to the WiFi.

This is just one common example of field service management (FSM) and how it has evolved to become more customer centric. If the service is as per customer expectation, there is every possibility of a repeat order. It is then right to say that today the field service technician is the front-line brand ambassador for your business. But a lot goes behind making field service really work and technology plays a vital role here.

In the future, demands placed on field service operations to get the job done right will only increase, as connected consumers and devices (both in the home and mobile) will require more attention. With so many aspects of field service shifting, has your business kept up the pace? Manual processes just won't cut it.

Field Service Management software, you can guarantee that you have the functionality you need to support the demands of today and tomorrow.To describe it in simple words, field service management is a system for managing end-to-end activities in a field service organization including scheduling, dispatching, invoicing and billing as well as delivery. FSM technology is a technology that automates the field operations of a team of service professionals through mobile systems. You can safely put FSM jobs into these four buckets: repair, maintenance, installation and consultation.

The changing user demand and the innovation in technology has given a different dimension to the traditional field service management. Gone are the days of laborious manual activities of managing your field workforce. Technology has powered the field service management arena with more automation and hence increased the ease of operating in the field. Today you can practically control your entire field service operations at a click of a button on your mobile.

We owe a lot of it to the emergence of cloud computing. A sophisticated cloud powered FSM solution helps in controlling field components through a cloud-based portal which can be accessed from mobile devices while field technicians are on the job. For industries that are heavily reliant on their field service performance, like banks, pharma companies, food delivery units, logistics companies, this changing technology has led to some pathbreaking results. Companies opting for newer field service management systems are not only seeing a reduction in operation costs but also witnessing a marked improvement in productivity of their field workforce. Real-time updates help in planning ahead of time and addressing issues on the go. The result is happy customers and more brand loyalty.

The global field service management market is expected to reach approximately USD 5.59 billion by 2023 growing at a 16.6% CAGR.

Source: Marketwatch

Current Trends in
Field Service Management

Performance efficiency is the biggest metric in the field service domain. According to a survey, almost 53% of respondents cited improving workforce utilization and productivity as the top driver of optimizing their field service performance. While almost 42% cite quicker response time for customers and improved service efficiencies as the other key drivers.

Given the tug of war between competitors on one side and customers on the other, FSOs must walk the tightrope of delivering impeccable service in the field time and again. This has led to the adoption of an outcome-based model to bring value to everyone in the FSM chain. So how does a field service organization keep up with the growing need of higher performance levels from its field workforce? Here are a few trends catching up globally:

Mobility

**Predictive
Intelligence**

Cloud

Automation

**Optimized
Dispatch**
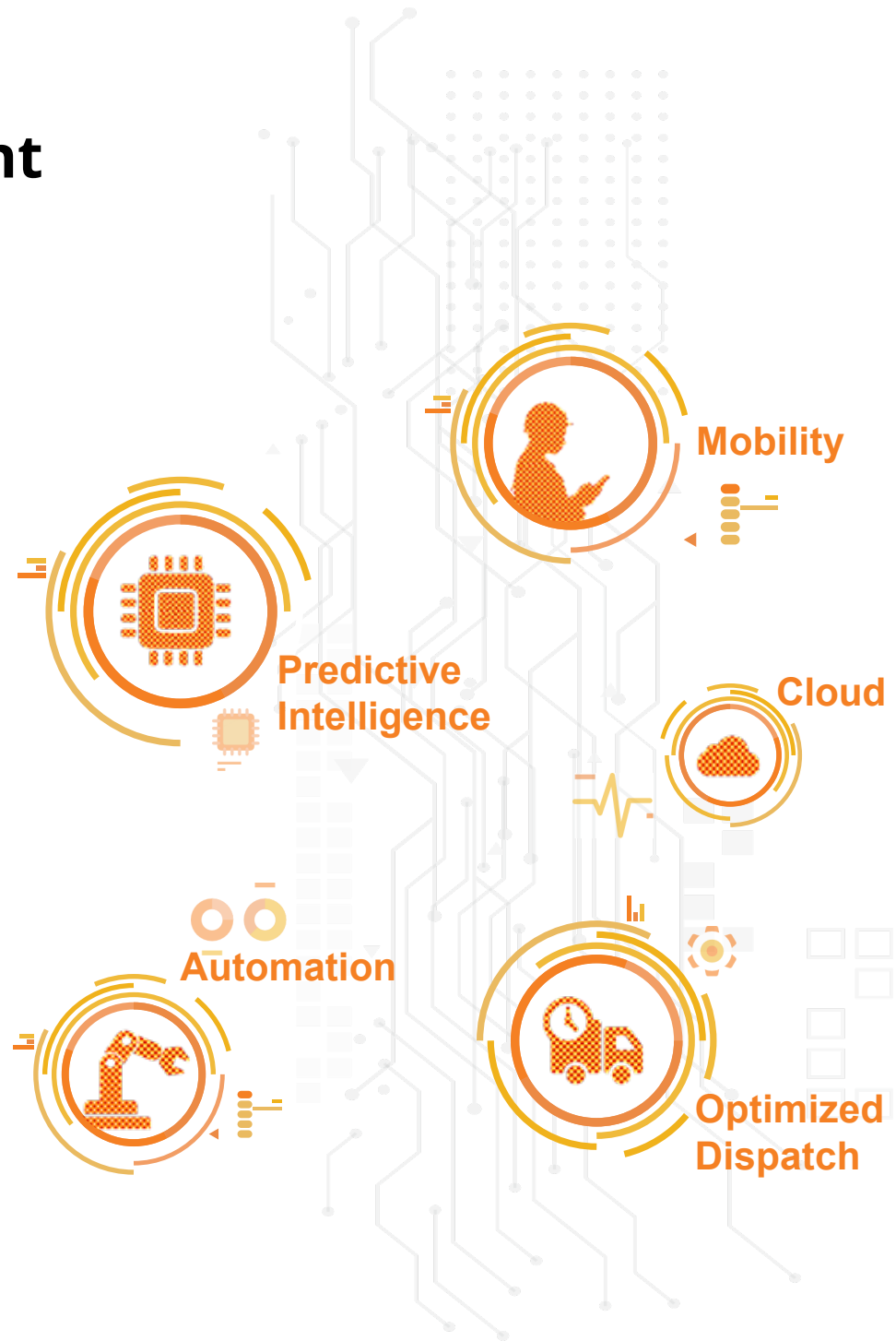
Mobility

Mobility is the essence of field service. Earlier versions of a number of field service management systems provided only a centralization of information and data. However, it wasn't integrated into mobile nor to a computer. Prior to the latest updates, the previous process would field or service technicians to record the data they've gathered into paper documents. Then, it would only be updated for the system when they've reached the office, more so by transferring it manually. Even more so apart from calling the field service technicians, there was practically no way the desk operators and field service technicians could communicate efficiently. Nor could they intervene in real time if a need arose. The best they could do was to call each other and narrate what's needed.

Automation

They should offer a balance between information and automation. First and foremost, the FSM system must be designed in a way that is easy to use with guided workflows to reduce the complexity of tasks. Certain tasks must be automated so that the technicians don't end up coordinating at the back office end. The core essence is to build the FSM system that is designed to increase the efficiency of the field workforce and reduce avoidable overheads or delays.

Cloud

The software-as-a-service (SaaS) model of using FSM software is on the rise because the cloud brings tremendous agility to the business as well as works great on cost. Cloud lowers IT costs and helps improve employee satisfaction and efficiency. It also offers easier access to the software, not limiting its usage to the office. This can be crucial for many field service businesses.

For companies that have limited disruption in their working model, SaaS makes absolute sense, even if it is a major company with standard operating procedures. On-cloud SaaS model removes the dependency on on-premise business drivers bringing in more flexibility and speed at work.

Optimized Dispatch

The success of an FSM system can greatly be determined on how well defined your scheduling activity is. Here automation can be extensively leveraged to achieve the full blown effect of a successful FSM activity. In any field service management system, there are two main components - the field force and the tasks at hand. The success depends on how effectively the task is achieved based on the agreed SLA.

Optimizing the scheduling operations assume great importance to make sure resources are utilized in the best manner for the right task, at the right time. This also involves assigning the task to the right resource who is skilled and capable of handling the task at hand. Also, if the resource doesn't go with full preparation, it would lead to repeat visits, which again adds to the cost. Automated scheduling with real time insights helps in better planning and resource allocation. Ultimately this results in controlling the cost leakages and bringing more efficiency to your FSM cycle.

Predictive Intelligence

Predictive maintenance is now the playing field for making FSM more accurate and impactful. Think about this as being ready before the crisis strikes. Internet of Things and Artificial Intelligence have made this possible and how. IoT has ensured we are connected anytime, anywhere. Artificial Intelligence has brought more granular insights inplace that help companies prepare for the future by constantly uncovering patterns from the aggregated data through machine learning. Power of voice is ushering in too to make the entire cycle virtually comfortable to operate. Companies are increasingly making use of chatbots for nurturing business leads as well as maintainingthe necessary customer connect. All this predictive action enables the required readiness for mitigating any potential deflections and staying proactive throughout the field service journey.

Introduction: Understanding Field Service Management

Essentially, field service revolves around managing people on field to perform their field jobs in a way that increases efficiency, maximizes customer satisfaction while minimising operational costs. With multiple levels of coordination involved, achieving this consistency of field operations on a daily basis can prove to be a real challenge for companies.

Let's dive deeper into some of the top challenges faced by FSM companies and how technology can make the difference in solving them, especially when digital connectivity is on fire:

To ensure service quality without pressuring performance costs, companies are increasingly adopting technology automation to plan and perform better in the field.

How to match up with these constantly changing customer demands and making the customer involved and attended to, is a huge challenge for companies today.

Customer satisfaction

Capacity management

Getting it first-time right

First time fix rates aren't an easy goal to achieve. As per a research done by 3GEM, 24% of field service dispatches require a second visit. Every visit on field is a cost to the company so it only makes sense to ensure the task is completed right by the technician or the delivery guy in the first attempt itself.

This could be lack of information on the technician's part or his failure to carry the right parts for the job or simply a miscommunication in the system. Whatever be the reason, for organizations this could have a serious impact on the bottom line in the long run.

Poor satisfaction is the major reason why customers change service providers. On-demand delivery has made customer expectations touch the roof. In today's technologically powered landscape, customer loyalty is strongly attached to the quality of service he receives from the company. Taking the routine case of Amazon and how it's prime delivery service swung a huge user base in its stride. Who would have imagined a concept of same-day delivery but Amazon made it possible and this has had a remarkable impact on customer expectations

This is just one example. But given the general trend, today's customer is conveniently getting used to shorter wait times and consistent deliveries. The customer expects to be in loop throughout the journey of the order completion. An official survey from 3GEM mentions that a whopping 89% of respondents wanted real time technician location. And hence it has become imperative for field service in any sector to step up to the mark for the business to succeed.

Regardless of their industry sector, all field service organizations must contend with different types of daily, monthly and seasonal workload variability while balancing their capacity for general ongoing maintenance work and keeping some availability for high priority emergency work. The challenge is how to effectively manage the peaks and valleys of workload.

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As per a research done by 3GEM, 24% of field service dispatches require a second visit.

Measuring field efficacy

What are the metrics to conclude the efficiency of your field operations? Cost and quality are the most important KPIs to evaluate the performance of field service in any sector. It is often a challenge for companies to ensure that the cost overheads come down in time while quality of field service keeps improving. Manual processes, paper-based collections, poor customer coordination, shortage of skilled workforce, are just some of the common problems in the field service sector. Studies point out that leading companies who implement field service analytics see an 18 percent increase in profits and a 44 percent increase in SLA compliance.

According to it's latest report, Gartner believes that by 2020, 40% of all field service tasks will be undertaken by contractors. Having a network of independent contractors certainly provides the benefit of flexibility and improved productivity (as they are paid by the job, a model which is not possible with unionized employees), but it also presents an array of challenges. How can you ensure the needs of your customers are being met when the service is provided by a third party?

The reasons companies are engaging with third party players could be many - better skilled workforce, wider geographical reach or higher staffing flexibility. Third party players provide the flexibility to scale up if the task at hand needs more manpower. For companies to recruit and train new employees is a time-consuming affair and a large number of companies approach third party players to stay agile. With the increasing use of third party players to deliver superior field outcomes and enhanced customer experience (CX), managing them is equally a challenge for companies.

The most important hurdle is getting avisibility into the activity of your third party field force. This makes monitoring them a difficult task and companies are left with limited control to track the performance of third party players. There is a huge gap in information exchange unless you integrate the two ends with the help of technological solution.

Some figures...

60% long waiting time = bad experience

86% expect mobile alerts

89% want real time technician location

24% of jobs require a second visit

50% of field visits require a service part

Source- 3GEM

How can **Field Service Management** Go Wrong?

The advantages of getting an FSM tool to manage your field ops is always a good idea. New technology innovation in FSM has addressed many challenges to improve an organization's field efficiency and customer experience.

If your organization is contemplating a FSM system, here are a few things to keep in mind to ensure it does not go wrong:

Failure to make it inclusive

A FSM tool leads to a significant behavioural change in the everyday routine of all the players involved. Imagine getting a new system in place without involving the important stakeholders in how it works! Right from supervisors to actual field service people, it impacts interactions on all levels making them more seamless. Considering the interdependencies, the thought of implementing a new FSM system must have involvement from dispatchers, field supervisors and engineers, along with the IT head who has the final control.

Everyone in the field service chain needs to understand the value of implementing the new software.

All the players need to be comfortable with the functionalities of the new software system in place according to their level of work, which will take care of potential operational glitches. Failure to make it inclusive may create insecurity, misunderstandings or lobbied approach, which will be detrimental to the organization's success in the field. Change management and emotional intelligence are other important factors that need adequate attention when one updates to a newer platform.

Not ready for change

As an organization if you are keen on adopting an FSM system to streamline processes, you need to first ask the basic question - do you really want to get it to change things around or you simply want to get it to stay current in the market!

Onboarding to a new system is a time-consuming affair and very cumbersome if as an organization you have to force that change to your people. Not everyone may like moving out of their comfort zone and putting in extra effort to get techno ready.

As a preliminary exercise, an organization must check its readiness to next the next plunge. You need to train and hone your people to accept the changes that will come along. Absence of doing so will leave you back where you started, doing historical mistakes and seriously injuring your return on investment. Adapting to new technology is a natural progression but consider it only if you are ready to make it work!

No periodic reviews

Consider a scenario where as an organization you have brought into place a wonderful FSM system. You have involved all the people from the start and trained them well. Everything is working well and you are off to a great start! Suddenly, a few months down the line, the performance is slipping. Your KPIs are not up to the mark. Is the software not working right? Is your field force not operating optimally? Are there any technical problems or overlaps that you have missed? Do your SLAs need to change? Is your customer expecting more? Finally, are you reviewing the performance of your FSM tool at regular intervals and making the necessary interventions?

Once you go live, it is equally important to have your regular checks and balances in place, especially when there is automation involved. You need to steer the automated functions to align with your organizational goals and meet your customer expectations. You need to check what's changing while your FSM keeps ticking along! That will bring forward some predictive insights that can the management make informed decisions for the future.
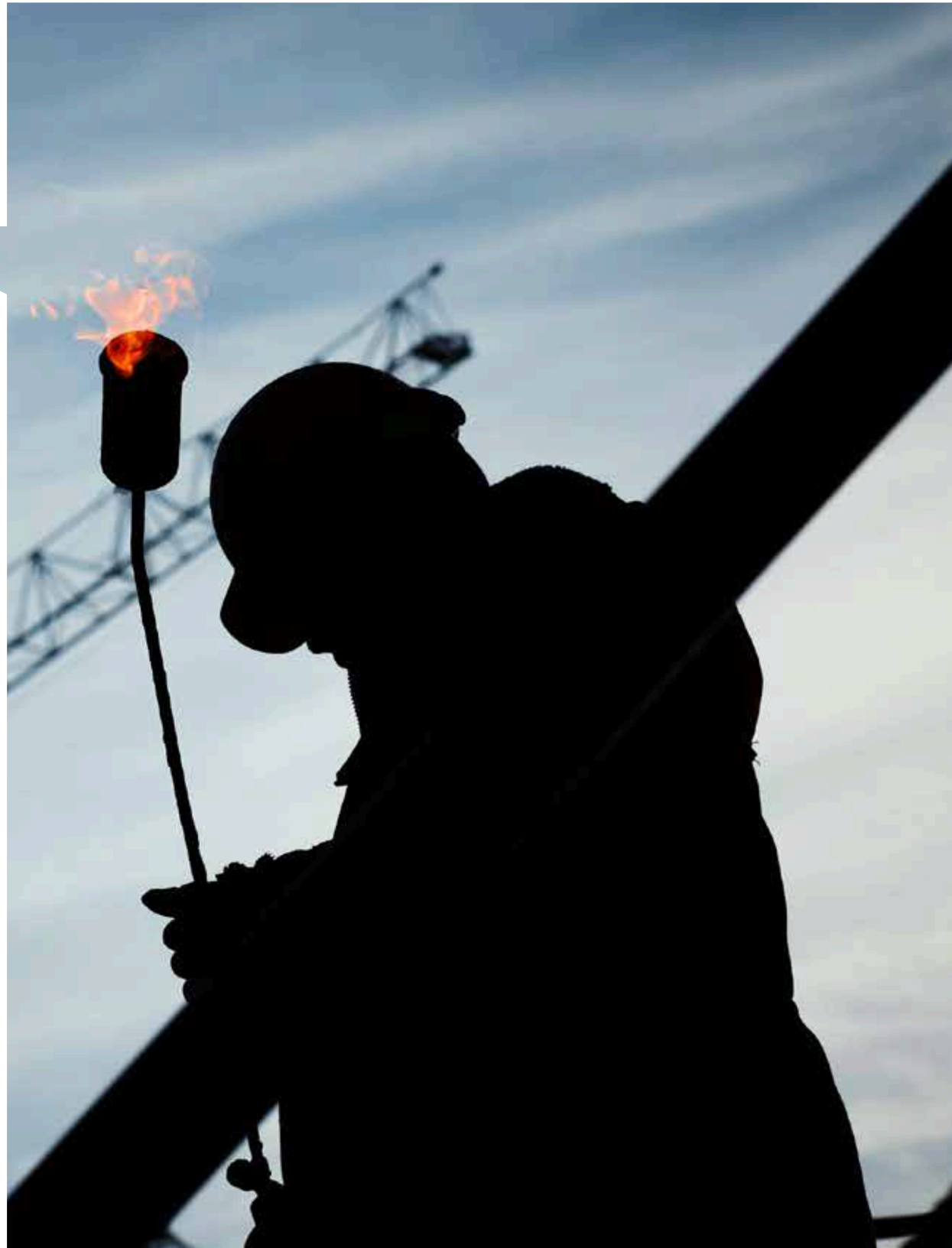
How Top Companies are Solving **FSM** Challenges

It is an everyday challenge for companies to deliver field service that is reliable for customers while achieving greater service profitability. These challenges could vary according to the nature of industry - be it pharma, food, logistics, BFSI or any other.

Studies point out that 8 out of 10 customers are willing to pay for a better customer experience.

How can companies start on their journey of transforming their customer experience? The answer lies in becoming embracing disruptive technologies. An intelligent enterprise business model holds the key for continued success. Investing in an intuitive FSM tool is a good business strategy to deal with challenges in a predictive way. Built on latest technologies that enables a great deal of automation, FSM systems make the process more organized, robust and futureproof.

Here are some best practices that companies can follow to transform their field service:

Optimize customer experience

Use user experience to enhance customer experience. Provide a personalized self-service portal to customers that will enable them to easily book and manage service appointments and also give them the visibility into the ongoing status of their requests. Build this in with proactive notifications, product updates, tips, workarounds, and anything else that helps optimize their experience. Gone are the days of longer wait times; two-hour appointment windows are the norm now. Customers are becoming more intolerant of poor service and are even willing to pay a premium for guaranteed one-hour window.

Make 'field' easy for technicians

Make the service experience smooth for your own field technicians to operate. Give them quick and easy access to work or information, parts management, service history, and collaboration tools. Enable them to manage their tasks and schedules, as well as track travel and work time in the field. When work is complete, provide the ability to capture and record the customer's signature for acknowledgment of completed work. Companies should give more autonomy to technicians to take decisions based on the situation they face without always having to rely on the central dispatcher. This helps in making them more responsive in the field.

Collaborate across organization

Connect field service with the entire organization to get full visibility into customer issues. When your entire organization is connected, the root cause can be identified, which will help in providing the right solution. Assign tasks to the appropriate personnel in other departments and track status to ensure complete and successful resolution. One such company, Area Wide Protective, saw 64% faster invoicing and a 41% reduction in invoice corrections when they implemented a field service solution that connected data about services delivered directly to the back office team via CRM.

Skills, technology, flexibility...all matter

In the technology space, Artificial Intelligence and Machine Learning enabled applications will bring light to new channels and intuitive interfaces for customers. Enriched conversation coupled with chatbot for customers is the key to resolve issues efficiently and enable automation.

Automated scheduling will help in optimizing field resources by assigning work to technicians automatically based on proximity, availability, and skills required. New FSM systems should bring in more flexibility allowing dispatchers to easily modify assignments, track SLAs, and manage exceptions as well as support onboarding and project rollout with structured project management. To maintain the talent pool dynamics, companies must focus on the millennials entering the industry. Communication, collaboration and engagement are keys to creating a millennial-friendly environment.

Use data for decision-making

Get your insights in place and learn from them. Identify the patterns in your field service performance with the help of advanced technology liked IoT, AI and ML. As IDC reported in its Worldwide Digital Transformation Predictions for 2019, 95% of organizations will have incorporated new digital KPI sets by 2023, focused on product and service innovation rates, data capitalization, and employee experience. Global spending on IoT devices and services will reach $1.7 trillion in 2020. Data is powerful and having a single dashboard can help operations managers make smart business decisions, faster.

Follow proactive approach

Think in the future and make room for predictive action. Use advanced technology to diagnose potential issues that will help in resolving them before the customer is even aware of it. Automatically schedule planned maintenance activity for each asset to maximize uptime and meet SLAs.

Key Features of a Field Service Management Software

The objective of any technology is to help one in performing the task better than before. A Field Service Management (FSM) software helps companies in optimizing their field operations.

Essentially, field service management software allows you to schedule workers, collect important data and documentation, issue invoices, manage fleets, assets, and so much more. The FSM software's mobile app works as an interface between a company's field technicians and its CRM to perform field tasks with a higher degree of professionalism. It allows more visibility and control in the entire field service function leading to an improved customer experience.

Field service software solutions can be deployed on-premises, via cloud-hosted services, or with a hybrid solution. Cloud solutions are gaining popularity owing to reduced IT infrastructure costs, quick deployment, and an agile IT environment. More than 80% of companies now use cloud hosting to deploy their service management solutions.

Let's understand some important features that any good FSM system must have:

Workforce management
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The impact of your field delivery depends largely on how well you manage to deploy your field assets. Automated task scheduling is the central hub of activity. An FSM tool allowing automatic scheduling and dispatching with real-time updates is a great help. It builds more transparency and increases the speed of operating the service cycle. Integrated GPS and inventory tracking helps in managing inventory, employees and fleet all at one glance and without waiting. More power to the world of intelligent and optimized algorithms!

Mobile interface
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Your FSM system should be supplemented with a native mobile app providing a feature-rich toolkit for field technicians. This will enable your field workforce to do routine tasks like accept jobs, order parts, capture signatures etc on the go without relying too much on people or paper. This makes the entire process very agile. The mobile app should work both online and offline.

Integration
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Your field operations cannot work in silos. A FSM solution should be integrated with your company's CRM. This gives more knowledge of the customer journey to your field resource without having to call and check back with the team time and again for any updates or changes. This saves a lot of time, builds confidence in your field team as they are aware of their customers, which helps in better engagement.

With automated and integrated systems enabled by FSM software, data points that are generated in one corner of the organization are updated everywhere and instantly accessible from both mobile and desktop devices. When accounting updates an invoice, customer service makes a change to a support ticket, or purchasing notes a reduction in expected inventory due to a missed delivery, field technicians will be able to see these changes in the system and deliver accurate information to customers

Real-time reporting
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A FSM tool must give access to business intelligence reports and dashboards that help

to measure the performance of your field service function. Closely monitoring every aspect of your business operations, from contract management to profitability, enables your team to make data-driven decisions that lead to better service delivery.

Automated scheduling and dispatch
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A modern field service management software will provide dynamic scheduling that uses data on technician skill-set, availability, inventory, and customer preferences to boost first-time fix rates. This enables intelligent technician dispatch and routing based on real-time traffic conditions, weather, and geolocation batching

Predictive intelligence
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Today, field service management should boast of AI powered field operations that predict outcomes and swiftly resolve or elevate customer issues resulting in more satisfied customers. In addition, IOT enabling devices to communicate with each other as well as with service center eliminating human intervention.

How to Select a **Field Service Management Software**?

Here are some motivators for a FSM evaluation:

How does a company decide whether a FSM tool is a good fit? The selection criteria for a FSM tool could depend on what purpose it solves for the company.

Impact on the revenue pie

For companies, everything revolves greater revenue profitability. A good FSM tool can significantly help in shifting the focus from cost to revenue by bringing in improvements in service operations. Some important questions to ask here are:
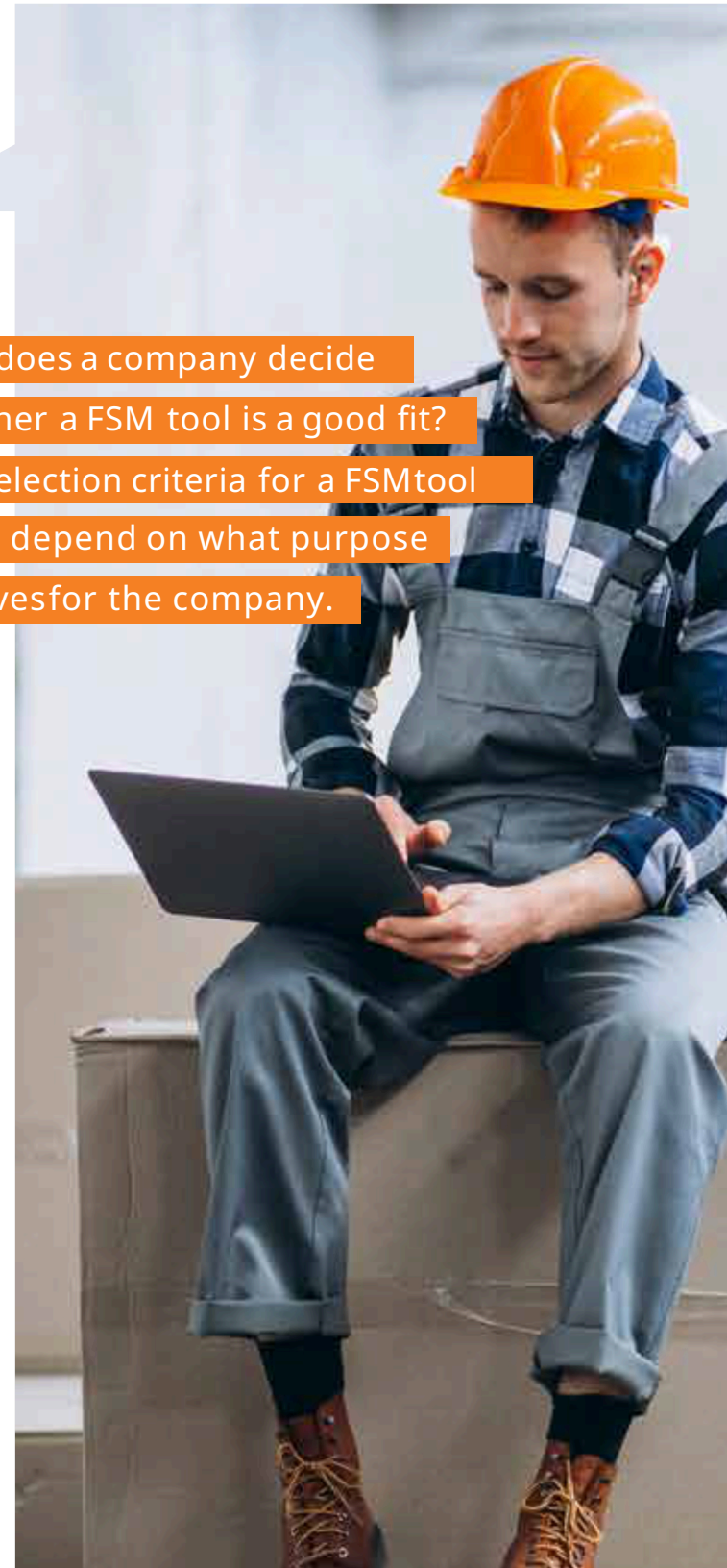
- How is the market responding to your service offering?
- Is the customer happy and confident about your services?
- How do you improve product sales and open up new revenue streams?
- How do you improve planning and forecasting?
- Are you missing any revenue opportunities?

Build more revenue streams by creating new opportunities that increase positive customer response. This could mean improved SLAs, more customer feedback, predictive escalations and so on.

Elevating your customer experience

A good FSM tool should lead to better customer engagement. Is your software taking care of all the customer touchpoints? Are you available to solve any disputes or grievances raised by your customer? Is your customer able to reach you in time?

According to Gartner's Magic Quadrant report 2019 the ability for customers to initiate workflows directly, and to track them in real time (including status updates, technicians' travel progress and requests for quotations), is increasingly important.

To elevate your customer experience, bring in a software that takes care of your key customer KPIs and improves NPS scores:

- Offers self-service capabilities such as chatbots with natural language processing that will help customers to resolve easy queries
- Allows customers to interact with you using multiple digital channels
- Has time commitment capability as well as predictive notification feature that keeps the customer informed in advance

Tightening your SLA adherence

If the objective of your organization to achieve more SLA efficiency, you need to design the software functionality to perform with accurate results. The key question here is are you delivering what you promised? Here are a few things to keep in mind while drafting your contractual agreements:

- Keep your goals objective and attainable
- Maintain complete transparency with the customer

- Use simple, jargon-free language for your SLAs
- Hire the right people for the job
- Focus more on training your technicians

Maximising operational efficiency

Field service operations depend on a number of factors which determine the optimal efficiency of your mix. If you want to maximise the operational efficiency of your workforce on field, it includes getting a review check on all the essential components of your field operations - technicians, fleet, customers!

There is a thin line of managing costs without compromising on performance. Here is how an FSM tool helps:

- Automated processes that lead to better scheduling and optimized resource allocation
- It offers complete visibility into inventory cycle that helps to plan better
- Improve first-time fix rates and on-time performance
- Helps in increasing billable hours

Driving digital transformation

With digital transformation your field service can reach newer heights. Gartner has predicted that by 2020, 10% of emergency field service work would be both triaged and scheduled by AI.

Intelligent algorithms make the modern FSM tools give unprecedented performance results. Common advantages are:

- Improved asset tracking with IoT
- Automated work order management
- Detailed performance insights with custom reports
- Real-time updates leading to dynamic processes
- Predictive intelligence to plan in advance
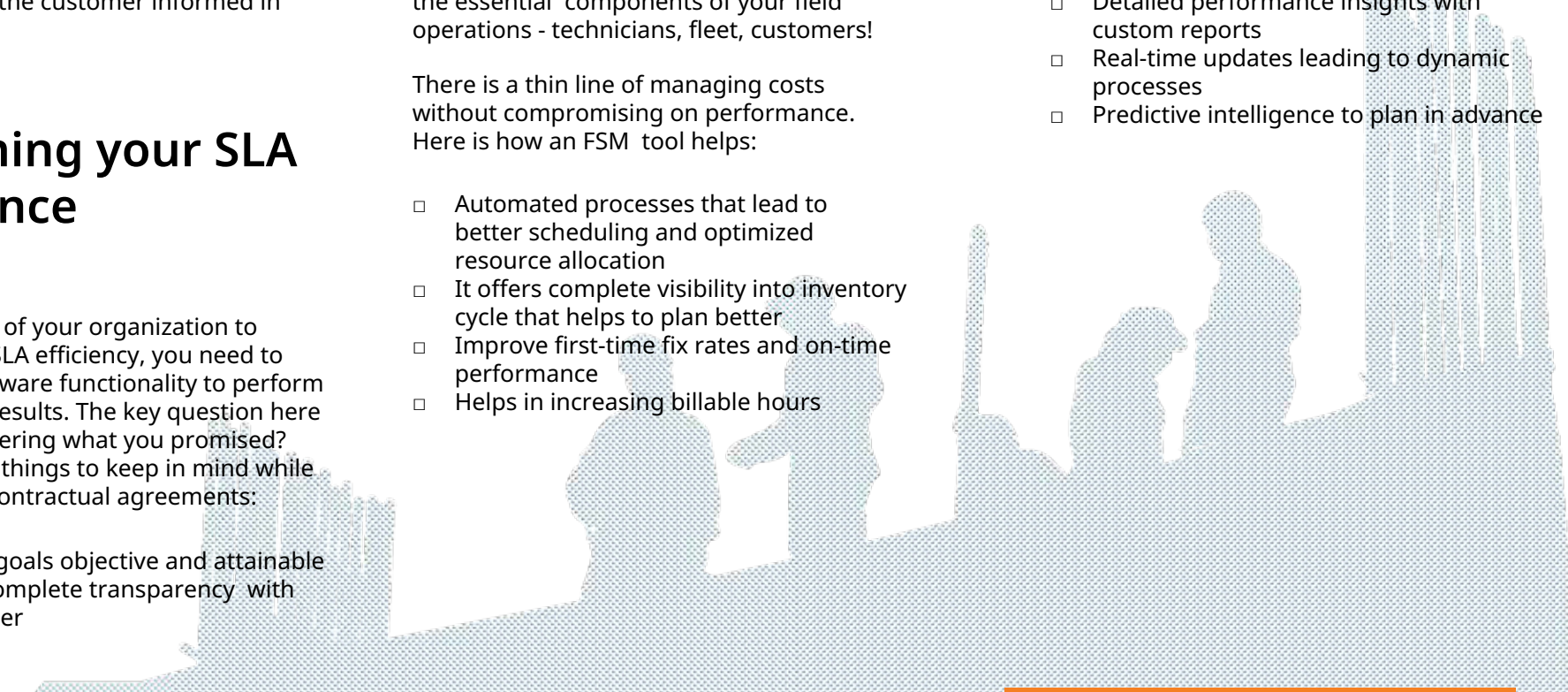
Conclusion

The future of service is here. Customers no longer expect effective service – they demand next-level capabilities that provide convenience and business intelligence on the value they are receiving. Service organizations are now faced with the challenge of future-proofing their operations to keep up with the rapidly evolving customer demands and technologies. And it all starts with a smart field service management (FSM) solution.

Selecting an FSM platform today requires a new approach. In order to differentiate as a thought leader, you must invest in a comprehensive FSM platform that offers the functional modules you can utilize not only today, but one that is flexible enough to evolve over time with the changing needs of your customers and your business requirements.

Empower your field operations with Dista

Dista Service, a dynamic location-enabled field force management solution, helps organizations with mobile workforce to unleash the full potential of their field service operations, ensuring higher customer experience and improved efficiency.

Our capabilities

- ☐ Intelligent scheduling
- ☐ Dynamic routing
- ☐ Service operation set-up
- ☐ Technician enablement

- ☐ Automated job scheduling
- ☐ Work order management
- ☐ Preferred time slot selection
- ☐ Predictive analytics
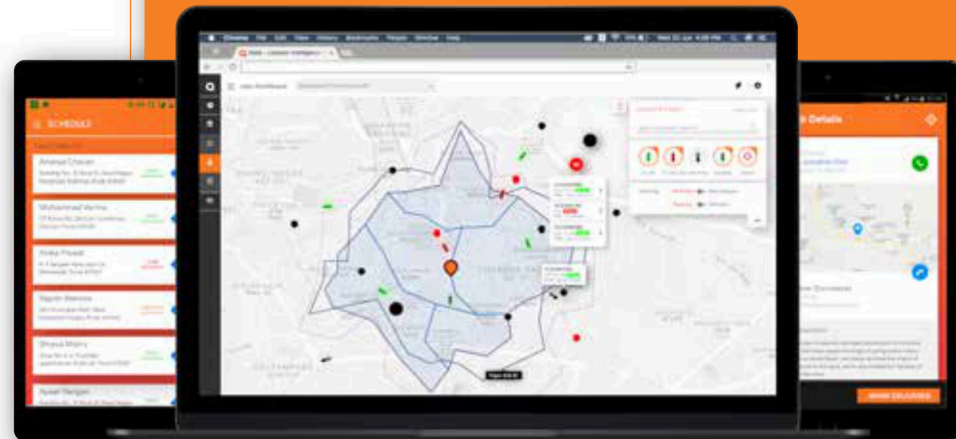
About Us

Dista is a location intelligence platform that offers cutting edge cloud-based field service management, workforce management, shared mobility (ride-hailing), first and last mile delivery management to quick-start your business, optimize each service interaction, and delight your customers.

Derived from the Sanskrit word 'Disht' for positioning or goal, the Dista location intelligence platform is used by more than 20000 users globally to supercharge their intelligent operations. Powered by Google Maps and Google Cloud, Dista provides features like locators, grid definition & management, cockpit & dashboards, scheduling algorithms, route optimizer, asset tracking, and others to increase operational efficiency of businesses.

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