
The Technology to Help You Win
INTRODUCTION: THE NEW RULES

Field service managers are being asked to boost productivity, control costs and increase customer satisfaction—without cutting corners on safety and quality. If all of that wasn’t enough, the main goal of optimizing service efficiency remains.

To increase customer satisfaction, service businesses have implemented a variety of different strategies. Those with the size and budget to sustain a very large-scale operation have added more mobile resources on the ground and more trucks in the field to ensure that all jobs are fulfilled. However, this comes at a cost. The increased capacity can be underused, which leads to diminishing margins—potentially turning a profit center into a cost center.

In an effort to control costs and boost productivity, some service businesses are giving existing field teams a heavier workload, assuming that they will simply work harder and faster to get all of the jobs done. This can have a significantly negative impact on service levels, employee morale, and first-time fix rates as mobile employees race from job to job. Additionally, it could increase costs if miles driven between jobs escalate and employee overtime balloons.

For the majority of field service organizations, these are not realistic tactics; nor do they address the challenges of providing excellent customer service in an increasingly expectant world. The better option is a cloud-based field service management solution integrating mobile resources, customers, and technology – helping to address both corporate directives and ensure the success of the field force.

CHALLENGE: LITTLE BROTHER IS WATCHING...

The consequences for failing to deliver excellent service at any stage of the customer lifecycle has become so extreme that there is very little room for error.

In fact, one survey revealed that US companies deemed to have poor customer service are losing a staggering US $41 billion a year.¹

So, it should be no surprise that 44% of US customers are taking their business elsewhere as a result of inadequate service; and of those, 89% have switched service providers at least once or twice in the last year.

Unfortunately for today’s field service teams, bad experiences don’t stay between the customer and the service organization. Social media has given every customer a forum for publicly sharing bad customer service experiences in painful detail.

Some call this being watched by “Little Brother” because, at any time, one of the billions of smartphones in use today can snap a picture or video of poor service, shoddy work, or unsafe practices. These images are then shared with company management, regulatory compliance offices, consumer protection groups, or even the world via social channels. At every stage of the field service process, not only is someone always watching, they are empowered and enabled to take action if they are not satisfied with the service provided.

THE SOLUTION: WINNING THE WAITING GAME WITH TECHNOLOGY

To optimize efficiency—and make sure customer experiences are top-notch, forward-thinking field service organizations are blending modern technology and predictive analytics to look at field service operations holistically. By analyzing every aspect of the customer experience, service organizations can start to leverage performance patterns and environmental factors to better plan and manage their day-to-day operations.

Field service management software is not a new technology. Large service-based enterprises, with thousands of people in the field, have used these solutions for years. The typical solution operates like an air traffic control system and distributes jobs to mobile employees against a set of systematic rules.

However, this technology is evolving rapidly and becoming more and more dynamic. Collaboration tools and mobile devices enable workforces to stay connected more than ever before with the rise of context aware chat, video chat, Knowledge, and more. Advanced job routing engines can squeeze the white space out of a team’s day without threatening wait windows, first-time fix rates, and customer satisfaction. These solutions now bring the customer into the loop, delivering frequent communications via text, email, or phone as well as enabling self-service portals on the web or an app.

WHAT TO LOOK FOR IN A FIELD SERVICE MANAGEMENT SOLUTION

No matter the size of the organization, effective field service management is a challenge. Assigning mobile resources to jobs based on each employee’s skill set, the availability of certain tools and parts, the shift schedule on a given day, and proximity to the job can be complex. To solve this problem, companies should consider a field service management solution that incorporates the following features:

3. Ibid.
Automation That Accommodates Multiple Teams and Jobs

Field service management software should use a set of pre-defined rules to build the field schedule. If there is bad weather, traffic, a customer cancelation, or any other disruption to the daily schedule, the software system should be able to automatically adjust schedules, without human intervention in order to keep the schedule running efficiently. The solution needs an optimization and exception engine that will automate processes such as scheduling and exception management for any changes that occur throughout the day. Finally, this same automation engine should allow for the creation of different rules for each team or individual within a workforce.

An ideal field service management solution requires an optimization and exception engine that:

- Automates processes such as dispatch/scheduling
- Manages exceptions that occur throughout the day, and
- Allows for the creation of different rules for each team within a workforce.

As an example of these rules, an organization may have a team that only performs preventive maintenance checks on installed equipment. Therefore, optimizing the team to maximize the number of checks per day without having to pay overtime would be ideal. Within this same organization, there may be a team that focuses on commissioning new equipment and, in that case, allowing overtime might be more tolerable because the faster completion of work results in the activation of a new revenue stream.

A holistic system should be able to accommodate a multitude of rules for different team and job requirements.

Integration with Business Processes

Field service management software should enable a holistic and comprehensive approach to field service. The solution should include an extensive set of features as well as integrate seamlessly into existing business processes.

First, be sure that the solution will integrate efficiently with all other back-office systems in use, such as inventory management, customer relationship management (CRM), or enterprise resource planning (ERP).

Second, verify that the solution addresses the needs of multiple stakeholders within the field service organization. This should include complete sets of tools for mobile resources, dispatchers/schedulers, supervisors, operations managers, contractors, customer service representatives, and especially the customers.

The field service management solution should not only include an extensive set of features but should also integrate seamlessly into existing business processes.
Interaction Between the System and the Field Team

Field service management software must also enable rich interaction between the mobile workforce and the system. In addition to providing real-time routes and schedules, the system should provide tools that assist mobile resources with their work once they arrive at a job location: tools that allow field resources to ask for help, retrieve customer information, track down parts, and look up asset history – and they should be able to do this within one or two taps/clicks of their smart device. All of these tools must be designed to help the mobile worker achieve higher first-time fix rates and increased customer satisfaction. In addition, cloud-based solutions enable easy access for third-party contractors providing critical customer service support and directly interfacing with customers.

Customer Inclusion

Most importantly, a field service management solution must bring the customer into the process. Too often, the customer is left out of the service process, resulting in uncertainty and a feeling of helplessness.

Field service management solutions that can enable self-service portals should receive heavy consideration. Such self-service features enable customers to track a task, reschedule or cancel an appointment, and provide feedback to the company. The software should also allow for the creation of appointment reminders based on every customer’s unique preference—phone, text, e-mail, or social media.

Bringing the customer into the process eliminates the waiting period. Customers know exactly when to expect the technician. Information, such as knowing when a mobile resource is expected to arrive, reduces the likelihood a customer will turn to social media to vent about bad service. In addition, improving the service window is a prime opportunity for businesses to enhance their relationships with customers. When the job is consistently performed with efficiency, the customer will be retained for life—even if someone else can do the job for less money—and recurring revenue is secured.

A field service management solution must bring the customer into the process early and often.

THE GOAL: SATISFACTION RATES OF 98%!

Having a holistic view of the field service environment and automating all aspects of the process ensure that the right worker gets to the right job at the right time, based upon specific criteria.

Oracle Field Service customers typically experience some or many of the following business benefits:

- 40% reduced driving distance per visit.
- 46% increased jobs per day.
- 98% improved customer experience.
- 30% SLA compliance improvement.
- 45% improvement in the mobile worker to scheduler ratio.
- 20% reduction of unnecessary visits.
- 10% reduction of no-shows.
- 50% reduction of calls asking questions related to drive location; i.e. “where’s my mobile resource?”
- 75% reduction of overtime.
Having a field service management solution that achieves this holistic view can lead to customer satisfaction rates of 98%! Other documented savings after integrating a field service management solution are a 15% increase in overall productivity of the field force, a 15% percent reduction in the number of people needed in the field, a 98% on-time arrival, and a 75% reduction—if not outright elimination—of overtime.

Additional benefits:

- **Economics.** By optimizing the field service, companies can save an average of US$5,000 to US$20,000 per field service employee per year.

- **Operational efficiency.** Companies using a field service management solution for their mobile workforce have reported a 40% decrease in distance driven per appointment, a 75% reduction in overtime, and a 47% increase in the rate of jobs completed each day.

- **Customer satisfaction.** With a field service management solution, a customer’s typical four- or eight-hour wait window can be reduced to one hour.

**WHAT IF YOUR CUSTOMER IS A MACHINE?**

A large percentage of field service work involves servicing remote assets that have no human element involved in the service process. Examples of such items would include utility infrastructure or unmanned machines such as ATMs, vending machines, or radio/cell towers.

At first the idea of a customer-focused field service management solution seems unnecessary, because the machine cannot log onto a self-service portal or turn to social media if a technician is late. However, this remote equipment can still interact directly with field teams throughout the entire field service cycle. Most equipment is now being designed to connect to the internet, in what has come be to commonly known as the Internet of Things (IoT).

Machine-to-machine (M2M) technology allows equipment to proactively send alerts for service directly to the field service management solution, allowing for the immediate scheduling of mobile resources. This eliminates the middleman and allows for quick resolutions to problems.

The machine can also send critical performance information, allowing service teams to diagnose faults before a mobile resource is sent to site. This increases the likelihood of a first-time problem resolution because the technician has a better understanding of the problem before arriving onsite. If a particular business relies on the maintenance of remote assets, selecting a field service management solution designed to integrate with M2M technology must be a consideration.
CASE STUDY: HOLISTIC FIELD SERVICES FOR DELIVERY

Offering home furnishings with great design, natural materials, and exquisite craftsmanship, a US furniture retailer helps its customers create inspired living spaces. The founder and CEO has made customer service a priority throughout his organization since 1986.

Initially, the company scheduled deliveries with a full-time staff of eight customer service representatives and provided customers with a four-hour wait window for appointments. Employees invested as much as 48-person hours in planning and routing a single day’s deliveries. But achieving aggressive goals for on-time delivery with this manual system became increasingly difficult as the business grew.

By applying a holistic field service management solution, the company was able to dramatically improve key service, productivity, and expense metrics:

• 40% decrease in miles driven per delivery run.
• 38% more deliveries completed per hour.
• 95% customer satisfaction ratings (up from 81% in 2001).

CONCLUSION

Taking a holistic approach to field service management results in more-efficient operations and improved service. The key to this approach is field service management software that builds and controls technician schedules for increased productivity and customer satisfaction. Thanks to cloud-based solutions, the mobile internet, and the ubiquitous nature of smartphone technology, field service management solutions are now becoming readily available to organizations of all sizes.