

## WHITEPAPER



# Moving from reactive Field Service Management to proactive

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## Introduction

Traditionally, reactive Field Service Management (FSM) has been the default service organization approach to delivering good customer service. Simply put, this approach involves **responding to problems as they arise, and focusing on getting the job done**. For example: a customer complaint call lands at the help-desk, the job is assigned to a field technician, the issue is taken care of, and the job is completed.

**While this reactive response delivers on problem resolution, does it take into account the multiple points along the way, that could have been leveraged to increase customer delight?**

Fig 1.1 - Typical reactive field service issues



For field service organizations today, success no longer revolves only around "getting the job done". According to a report summarizing the views of Field Service USA 2013 attendees, "creating competitive differentiation in the industry is not measured on how effective workers are at completing the task, rather, it is measured by the overall satisfaction that customer has with the end result". This indicates that service organizations need to increasingly adopt a more strategic approach to revenue growth, customer satisfaction, competitive differentiation, and overall service quality – all of which cohesively define field service success.

With rising expectations of the new-age customer who is armed with new technology, the landscape of field service is continuously transforming. To become truly customer focused, field service organizations must take field excellence beyond scheduling technical appointments and closing customer complaints. So how can proactive FSM support this goal?

## Proactive FSM: capitalizing on real time information

The answer lies in enabling access to, and utilizing, real-time information gathered in the field. A more timely and accurate view of field force activities can help service organizations:

### Increase customer satisfaction & loyalty

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Achieving overall customer satisfaction is essential when it comes to staying ahead in the field services game. Organizations in the field service industry are able to increase profit margins by addressing customer needs more efficiently, but this depends on how much information the technician has about the customer, the issue, and the resources available. The more accessible this information is, the easier it will be for the technician to diagnose and resolve the customer issue.

### Improve operational efficiency

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By facilitating a real-time flow of information between field personnel and their managers via processes and workflows, service organizations can improve tracking, communication, collaboration and reporting. These improvements help organizations overcome the challenges of managing a dynamic field force. Such focus results in driving efficiency of operations (especially technician utilization) and leads to improved service quality, which improves revenues.

# 3

## Raise employee morale & lower attrition

Providing the field force with on-demand access to information such as inventory stock and availability can assist engineers in making the right commitments to customers, right then and there. According to the Aberdeen report, 76 percent of Best-in-Class service organizations say that their engineers have access to up-to-date work instructions while on customer site. This empowers field service engineers to make immediate and data-driven decisions, fostering an internal drive towards service excellence. This attention to individual professional advancement facilitates a working environment of confidence and positivity, which is channelled into improved employee productivity and service excellence on the whole.

## What competencies should service organizations develop to shift from reactive FSM to proactive FSM?

The answer lies in enabling access to, and utilizing, real-time information gathered in the field. A more timely and accurate view of field force activities can help service organizations:

### Workforce Planning & Scheduling

Customers today won't accept a delayed service turn-around-time, and expect an exact ETA of the technician. Workforce planning and scheduling must involve dispatching the right technician to the right job, based on technician skills, service area or location, and available spare parts/ inventory.

### Customer Management

Customer information must be editable when required, and customers should be directly added into the customer database whenever a service call is created. The information stored within the customer database must be used to make new calls, ending redundant data entry.

### Knowledge Management

By empowering engineers with insights and assistance, service organizations can foster an environment of learning and information. If a technician leaves, the next technician in line can quickly be brought up the learning curve to resolve a customer issue. A services organization that wants to deliver proactive FSM will recognize the importance of moving beyond dependence on a handful of f engineers with specific knowledge.

## Operational Flexibility

Organizations can consider taking on products that are not directly off the shelf. By understanding the business objectives and tracking field force movement, they must adopt a solution that is powerful to deliver on-demand assistance as and when required. Considering a Cloud based solution offers a more cost effective solution on a per license basis and hybrid options are available which mix cloud and premise based functionality that can help scale operations.

## Driving proactive FSM with an on-demand mobile FSM solution

The ideal mobile on-demand FSM solution can help service organizations make the transition to proactive FSM by enabling them to monitor field executive performance, track valuable customer information and respond quickly to changing customer requirements.. When evaluating a mobile on-demand FSM solution, service organizations aiming to develop the competencies discussed above should ensure that it offers the following critical functionalities:

### Instant Scheduling & Dispatching

A graphical scheduler can provide for easy scheduling of all open calls against the time slots the field staff has available. A color-coding functionality for each process step can enable quicker identification of the current status of each call.

### On-the-go Attendance & Reporting

Service engineers should be able to record their attendance & location. The proactive FSM solution should enable easy reporting over a mobile, to help engineers avoid the unnecessary office commute & the filling up of daily service reports.

### Easily Configurable Processes & Forms

To enable automation of business processes, ensuring seamless integration with field users & flawless execution of services performed. The forms allow for customization of workflows using a service organization's own terminology and data types.

### Real-time Work Order Management

This functionality enables service engineers to update lead information or service call status on the go. Their managers get real-time data on call statuses, leading to better and more efficient decision-making

## Case Study: IT service provider experiences 25 percent improvement in field force utilization by leveraging configurable on-demand mobile FSM solution

The client is a leading electronic hardware manufacturer IT service provider with revenues of more than US\$7.5 billion who supports its customers' global field service operations across industries including banking, governance, insurance, transportation infrastructure and engineering construction. Their legacy manual ticketing and field service management process had limited field automation features. Only 30 percent of tickets were updated against the agreed SLAs, and they were also incurring high maintenance and infrastructure costs.

After upgrading to FieldEZ, an on-demand mobile workforce management solution, the client was able to configure the white-label product for various customer workflows, forms and data requirements. This made the solution easily replicable for the client, who was now able to leverage automated processes combined with better visibility and tracking to provide the end-customer with insights into improving the utilization of the service engineers. SLA compliance increased to 80 percent in three months, and to 95 percent within two years. The client also experienced a 10 percent increase in volumes handled, and a 25 percent improvement in field force utilization.

## Conclusion

The service industry is moving towards increasing customer satisfaction by improving service standards. This must be enabled by empowering service teams with a mobile on-demand solution that leverages real-time data from the field to streamline and automate processes. This gives field engineers the confidence to take data-driven and efficient decisions which can directly improve revenue growth, employee morale, customer satisfaction, competitive differentiation, and overall service quality. This will catapult the real customer-focused service companies above the rest.