

# The Definitive Guide To Modern Field Service Management



How Leading Service Organisations Are Automating Systems  
With End-to-End Visibility And Integration



Key Action Items



Key Benefits Of Modernised Service



Checklist Of Tools



Case Study

Cloud-based and mobile solutions empower service organisations to develop a 360-degree view of the service lifecycle and bridge the gap between disparate systems and data sources.

## The Definitive Guide to Modern Field Service Management

*A Step-by-Step Look at How Leading Service organisations are Moving from Manual, Disconnected Processes to Automated Systems with End-to-End Visibility and integration*

Successful field service organisations always strive to deliver excellent customer service while also working as efficiently as possible. Today, however, service teams must also address the challenges of managing increasingly complex service lifecycles, even as they adopt ambitious new revenue models and continue to manage critical operations.

Some organisations attempt to meet these challenges by implementing large Enterprise Resource Planning (ERP) systems. Unfortunately, traditional ERP is costly to implement; it often disrupts and disconnects established workflows, and it imposes rigid business processes that severely limit an organisation's long-term flexibility.

Thanks to new solutions, progressive field service organisations now have the tools to escape this technology dilemma. Cloud-based and mobile solutions, for example, empower these organisations to develop a 360-degree view of the service lifecycle, from scheduling and contracts, to warranties and business analytics, while connecting the dots between disparate systems and data sources.



23% of the service organisations surveyed said they had boosted their productivity by leveraging cloud-based, mobile-optimised tools.  
— Aberdeen Group

Field service organisations that adopt such new models can reap significant benefits. According to a 2010 Aberdeen Group study, 23% of the service organisations surveyed said they had boosted their productivity by leveraging cloud-based, mobile-optimised tools. As field workers move from paper-based to digital forms, for instance, they are frequently able to complete administrative tasks more quickly and easily.

While cloud computing and mobile technologies are key assets for modern field service organisations, they are just part of a larger solution. According to Gartner Research, many service organisations are also adopting goal-based change management methodologies to maximise efficiency gains from their technology investments.

A recent Gartner report - Supply Chain Transformation: The Service Life Cycle Management Maturity Model - demonstrates why this approach is so valuable for organisations that seek to implement transformative technologies. "The greatest gains are achieved by addressing the goal, cultural and organisational elements - and doing this first," the report stated. "Without a goal to mature and close gaps, the cultural change and full transformation can't happen."

Ultimately, successful service organisations are more streamlined, more agile and above all more intelligent than ever before. These organisations eliminate disjointed business processes and operational blind spots with tools that allow workers to collaborate on solutions in real time and give managers a complete view of key business practices and data points.



### Closed Loop Reporting Modernises Field Service

*Progressive field service organisations are leveraging a more agile, intelligent approach to revolutionise today's service process and enhance the customer experience.*

When an organisation's service teams are empowered with the appropriate technologies, they become far more mobile and adaptable.

This E-book will explore all of the ways service organisations are streamlining their internal processes by implementing a checklist for delivering a modern, and highly efficient, service model. This includes strategies and tactics to implement:

- > Advanced Scheduling & Workforce Optimisation
- > Inventory & Parts Logistics
- > Real-Time Collaboration & Communication; and
- > Mobile-Ready Workforce Productivity Solutions

Service organisations that adopt these methods typically do so by leveraging cloudbased solutions that give front-line professionals the tools they need to work more efficiently, and to keep customers satisfied and loyal.

This transformation is especially important to service organisations competing in the current fragile economic climate. When an organisation's service teams are empowered with the appropriate technologies, they become far more mobile and adaptable. As a result, they gain the ability to resolve customer issues more quickly, handle higher work volumes with less effort, and improve their overall operating efficiency.

*The modernised field service model enables today's front line professionals to provide optimised customer-facing engagements that support brand credibility and encourage customer loyalty.*

Businesses need to modernise their technology and implement new business processes that will automate and integrate their scheduling, parts tracking, customer contacts, administrative paperwork, and other operational tasks.

## Transforming the Service Model

Today, many field service organisations still rely on antiquated technologies and business processes. They struggle to manage paper trails littered with work orders, contracts, warranties, and other documents, often using nothing more than clipboards and file folders. Hand-edited spreadsheets are the tools of choice for managing and tracking service teams; performance and benchmarking data gets dumped into data silos that make it difficult to access or analyse.

Even scheduling - the key to controlling labour costs and productivity - is stuck in a technology rut. organisations still use daily whiteboard sessions and handwritten notes for technicians' daily schedules, making it far more difficult to assign work orders, and track and analyse labour trends.

Service organisations cannot drive growth and efficiency unless they rethink this outdated model. They need to modernise their technology and implement new business processes that will automate and integrate their scheduling, parts tracking, customer contacts, administrative paperwork, and other operational tasks.

They need to automate manual, labour-intensive processes and create centralised systems for managing and analysing data.

### Advancing Field Service Interactions

3 Keys to Modernising Field Service Management



Agility



Accessibility



Simplicity

*Today's field service operations hinge on efficiency, accessibility and modern technology.*

A forward-thinking service organisation needs more than just a shopping list of disparate technology tools. Instead, it needs a combination of related technologies and business capabilities that work together to advance an organisation's strategic business goals.

These improvements aren't just about technology. They're essential to delivering quality customer service, empowering field service reps to make sound decisions, improving the bottom line, and boosting a service organisation's overall productivity.

Consider some specific areas where a modern field service model, using integrated and flexible technology tools, can benefit a service organisation:

## > Work Order Management

- Increase productivity
- Reduce billing errors



## > Advanced Scheduling

- Increase dispatching efficiency
- Increase first time fix rate and customer satisfaction



## > Contracts and Entitlements

- Eliminate warranty leakage and increase renewals
- Reduce service and parts giveaways



## > Efficiency in Ongoing Service Operations

- Increase service revenue through cross- and up-sells
- Improve customer relationships



Service organisations can also gain a competitive advantage by implementing Service Lifecycle Management (SLM): a systemic, holistic approach to managing an organisation's product lifecycle strategy, supply chain management, logistics, warranty and entitlements tracking, customer service, and related activities.

## A Strategic View of Service Organisation Enablement

Service organisations can also gain a competitive advantage by implementing Service Lifecycle Management (SLM): a systemic, holistic approach to managing an organisation's product lifecycle strategy, supply chain management, logistics, warranty and entitlements tracking, customer service, and related activities. The goal, according to Gartner, is to create a service organisation that encourages stakeholder collaboration, empowers stakeholders to meet or exceed their customers' expectations, and ultimately to drive greater revenue for the business.

One of the key goals of SLM is to identify how and why every stakeholder in a service organisation contributes to - or endangers - these strategic business goals. "The prediction of service needs isn't enough. Rather, the company's activities actually orchestrate and shape service outcomes," said a Gartner report outlining the advantages of SLM. "Call centre employees and field technicians are in constant contact with people who have purchased products. They are in the best positions to exceed expectations and understand customer needs - or, conversely, ruin the customer experience."

It's easy to see why a new approach to technology works hand in hand with the SLM philosophy. When an organisation, for example, automates its tracking of contracts, entitlements, and Service Level Agreements (SLAs), it gains the ability to make this information visible to any employee who needs it - anywhere, at any time.

Another way service organisations take advantage of this strategy is to deploy cloud-based, on-demand Customer Relationship Management (CRM) portals that deliver a host of sales, marketing, service, customer retention, analytics, and related capabilities.

When an organisation creates a single system for tracking the physical location of key items, including parts and installed products, it establishes a single "view of the truth" that allows stakeholders to make decisions more effectively, based on a shared repository of organisational knowledge. And when a service organisation deploys advanced scheduling and labour management capabilities, it also deploys the information necessary to send the right field tech to the right job with the appropriate parts and tools - eliminating costly repeat visits and delighting customers.

Another way service organisations take advantage of this strategy is to deploy cloud based, on-demand customer relationship management (CRM) portals that deliver a host of sales, marketing, service, customer retention, analytics, and related capabilities. A platform such as Salesforce.com, for example, is flexible enough to layer on top of an organisation's existing business processes, yet it is also powerful enough to provide a customised, 360-degree view of every customer relationship. Once again, these tools give stakeholders the knowledge they need to make effective decisions, work more efficiently, and ultimately boost an organisation's revenue opportunities.



Service organisations of any size, working in any industry, can take advantage of these new technologies and operational techniques. In the process, they'll reap the benefits of greater efficiency, stronger customer loyalty, and ultimately higher revenue.

## The benefit of an optimised service model

Service organisations of any size, working in any industry, can take advantage of these new technologies and operational techniques. In the process, they'll reap the benefits of greater efficiency, stronger customer loyalty, and ultimately higher revenue. Yet an optimised service model will also deliver a number of other benefits, including:

- > Faster resolution times;
- > Visibility into work orders and the activities of field service partners;
- > Improved customer service and satisfaction metrics;
- > Shorter deployment cycles for an organisation's IT teams (in some cases upwards of three months);
- > Simpler and faster process for developing new business solutions;
- > Enhanced performance tracking data and other key organisational metrics;
- > A single, centralised platform for managing and tracking all of a service organisation's key operations.

Giving a service rep continuous, real-time access to service, scheduling, and support data allows them to complete more service calls more quickly, perform their work more accurately, and ultimately make a greater contribution to an organisation's revenue.

## Key action items for developing a modern social model

A modern service organisation needs more than just a shopping list of disparate technology tools. Instead, it needs a combination of related technologies and business capabilities that work together to advance an organisation's strategic business goals. The organisation must transform manual, silo-based tasks and disconnected processes into a single, seamlessly integrated workflow.

How is this accomplished in practice? According to industry experts and real-world case studies of these issues, the following qualities stand out as must-have items for any service organisation that is ready to rethink its current model:

### Anywhere, Anytime Access.

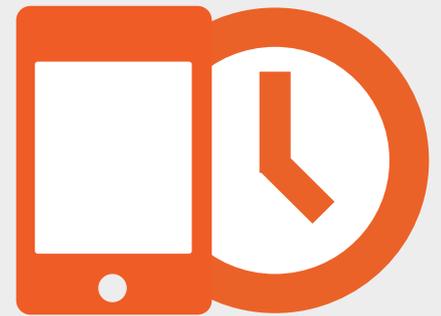
Mobile-ready technologies are absolutely essential for field service operations. Giving a service rep continuous, real-time access to service, scheduling, and support data allows them to complete more service calls more quickly, perform their work more accurately, and ultimately make a greater contribution to an organisation's revenue. In fact, a June 2011 Analyst Insight from the Aberdeen Group found that the top strategic action being taking by best-in-class field service organisations to drive field service performance was investing in "mobile tools to provide technicians with better access to information in the field."



50% of top-performing small and mid-sized businesses (SMB) employed solutions that gave service leaders on-demand access to performance data, while just 28% of all other SMB service organisations provided this capability.

## Real-Time Reporting Capabilities.

Mobility is essential to building a modern field service organisation, but it's not enough by itself. Organisations must also deploy systems that facilitate real-time reporting, tracking, and analytics tools. The benefits of these tools work both ways: Field service reps get important updates, scheduling changes, and feedback when it can be most useful, and management gets closed-loop reporting capabilities that give them better communication and improved visibility into field operations. According to Aberdeen Research, for example, 50% of top-performing small and mid-sized businesses (SMB) employed solutions that gave service leaders on-demand access to performance data, while just 28% of all other SMB service organisations provided this capability.



*Today's progressive service organisations are automating their operations to foster greater visibility into customer usage to predict future needs. Streamlined tools enable service organisations to capture predictable, ongoing revenue and enhance long-term customer value via enhanced experiences.*

Cloud solutions excel at providing real-time, on-demand communication, collaboration, and reporting capabilities; they are also well-suited to deployment as robust mobile ready applications.

## Team-Based Communication and Collaboration Tools

Solutions that employ applications such as Apple's Facetime or Salesforce.com's Chatter can revolutionise how a field service organisation operates. Field reps no longer have to guess at solutions or employ trial-and-error methods; instead, they can collaborate with other team members to identify problems, get answers to questions, and find successful solutions. The best person for the job is always on the job - or at least they're just one click away.

It's important to note that the emergence of cloud computing plays a key role in all of these capabilities. Cloud solutions excel at providing real-time, on-demand communication, collaboration, and reporting capabilities; they are also well-suited to deployment as robust mobile ready applications.

In spite of these advantages, some companies have expressed concern about the security and reliability of cloud-based solutions. Over the past two years, however, cloud computing solutions have demonstrated a consistently high level of security, safety, and reliability, making the cloud the deployment model of choice for both SMBs and large enterprises.



53% of all field service organisations, and 56% of SMB organisations, are either considering or planning to adopt cloud computing within the next 12-24 months.

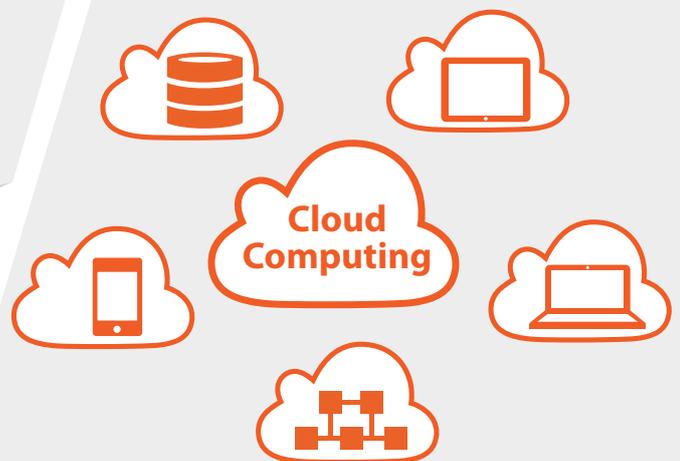
— The Service Council

## Enabling end-to-end service via cloud

Cloud computing is foundational technology for modern field service organisations. The cloud enables ubiquitous, browser-based access to field service applications. Cloud applications typically employ a Software-as-a-Service (SaaS) model that makes them easy to deploy, and they relieve IT organisations of the burdens of maintaining hardware, providing service and support, or installing updates.

In addition, the pay-as-you-go model employed by cloud computing providers allows organisations to pay for only the services they need, rather than dealing with enterprise-wide or seat-based licences that make it difficult to predict software costs.

All of this explains why cloud computing continues to gain momentum. According to a 2011 report from the Service Council, a consortium of expert field service organisations, 53% of all field service organisations, and 56% of SMB organisations, are either considering or planning to adopt cloud computing within the next 12-24 months. The report also found that field service organisations are especially focused on solutions that can make them more efficient without threatening to "break the bank with respect to either acquisition and startup costs or Total Cost of Ownership (TCO)."

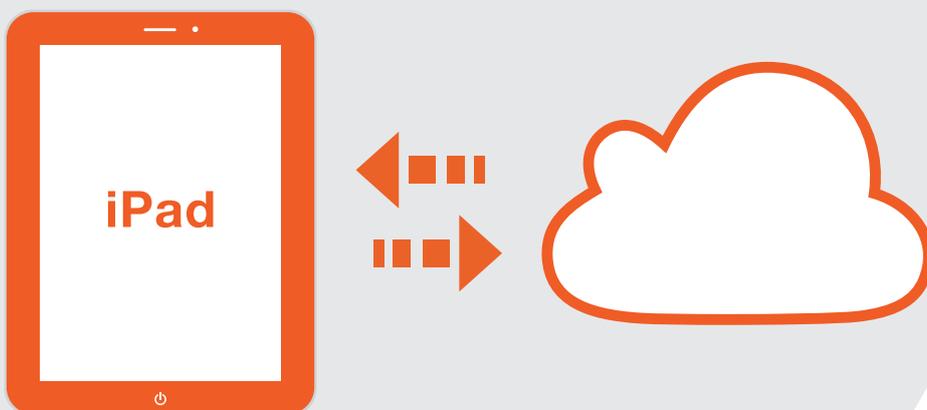


The iPad is primed to be "one of the principal 'go-to' devices for supporting field service operations in the next 12-to-24 months."

— The Service Council

Since cloud computing all but eliminates the cost of procuring and supporting back-end systems, and also alleviates the need for in-house IT staff, it's no surprise that so many service organisations see the cloud as the solution to the efficiency-versus-TCO dilemma. For service organisations, cloud computing offers other specific benefits. Many cloud solutions feature solid integration capabilities with CRM systems and third-party portals. For example, a service tech called to fix a dishwasher can check a partner company's ERP database to see if the machine is still under warranty. By making the right decision in the field, the tech could avoid mistakenly billing the customer for a part – a decision that, in turn, avoids additional customer service costs and customer-service challenges.

Furthermore, the explosion of powerful mobile devices, including tablets such as the Apple iPad, offers the perfect complement to cloud-based solutions. These devices are lighter, easier to use, and often less expensive than the traditional "ruggedized" service laptop, thus allowing service organisations to deploy them more quickly and in greater numbers. In fact, according to The Service Council, the iPad is primed to be "one of the principal 'go-to' devices for supporting field service operations in the next 12-to-24 months."



As a result of its work with ServiceMax, Solta Medical has built the technology foundations for a modern, highly efficient, fully automated field service organisation. At the same time, by promoting cross-functional collaboration and visibility into business processes, Solta has leveraged its field service organisation to build deeper customer relationships and new revenue opportunities.

## Case in-point:

### ServiceMax Drives New Efficiency And Revenue Opportunity for Solta Medical

Solta Medical, Inc. develops innovative aesthetic energy devices to address aging skin. Physicians around the world rely on Solta's two industry-leading brands – Thermage and Fraxel – to offer compelling solutions in the rapidly growing anti-aging market.



**SOLTA MEDICAL™**  
THERMAGE® | ISÖLAZ® | FRAXEL®

The company's technology infrastructure included a variety of legacy systems, manual business processes, and a lack of web-based tools for accessing customer and product histories. As a result, Solta's support, marketing and sales teams found it difficult to work together and drive revenue opportunities, while warranty leakage and other issues imposed unnecessary costs.

Solta selected ServiceMax to address its efficiency and revenue challenges. The ServiceMax solution integrated with Solta's existing ERP system, allowing Solta to eliminate two legacy systems and to automate nearly 1,000 monthly transactions. Sales, marketing and service team members now have visibility into customer cases, warranties, and account histories, allowing them to improve customer service and drive additional revenue. Contracts, entitlements, and SLAs are now visible to all employees; product configuration information, including components, software and firmware versions are tracked and maintained automatically. In the field, service processes have been automated, creating an integrated workflow that extends from the initial service request to Solta's service depots, warranty tracking and entitlement verification.

As a result of its work with ServiceMax, Solta Medical has built the technology foundations for a modern, highly efficient, fully automated field service organisation. At the same time, by promoting cross-functional collaboration and visibility into business processes, Solta has leveraged its field service organisation to build deeper customer relationships and new revenue opportunities. By automatically identifying when a customer's warranty is up, for example, Solta knows exactly when to open a new sales conversation and how to prepare for potential product issues.

47% of respondents reported that a lack of available parts resulted in first-time fix failures. That's why it is absolutely critical that a service organisation track the location and availability of parts, and ensure that those parts are available where they are needed.

— Aberdeen Group

## Checklist for creating a modern field service model

The majority of field service organisations are now considering or planning to leverage cloud-based solutions. In order to get ahead of the curve, however, a service organisation should apply the following checklist, with specific action items, to its technology decision making process:

### > Advanced Scheduling and Workforce Optimisation

These features enable managers to make the best use of their field service assets; they're able to send the right tech to the right job at the right time. As a result, they promise to raise the bar for service efficiency: According to Aberdeen, top-performing SMBs give their techs better access to day-to-day scheduling and work information than their competitors.

### > Work Order Management

Organisations need an all-around view of field service teams and their territories, including visibility into the process of creating, assigning, routing, executing and resolving field work, as well as post-service call debriefing and feedback.

### > Inventory and Parts Logistics

According to Aberdeen, 47% of respondents reported that a lack of available parts resulted in first-time fix failures. That's why it is absolutely critical that a service organisation track the location and availability of parts, and ensure that those parts are available where they are needed.

“Call centre employees and field technicians are in constant contact with people who have purchased products. They are in the best positions to exceed expectations and understand customer needs - or, conversely, ruin the customer experience.”

— Gartner Research

#### > Installed Base and Entitlements Views

Every team member, from field service managers to call centre agents and executives, should have visibility into a customer's full account information and the installed base of products.

#### > Offline Capabilities for Mobile Users

A disconnected worker can still be productive and efficient when they have access to tools that provide robust offline access to critical service information and customer data.

#### > Self-Service, Web-Based Portals

Successful service organisations empower their customers with self-service tools to check on the status of an order or request, and they also allow third-party service partners to access necessary data – without sacrificing security or privacy.

#### > Robust Management Tools

Service organisation leaders get a real-time, dashboard-based view of key business metrics, including inventory data, revenue, labour costs, performance indicators, and customer service-level information.

“For decades, companies have been promising to delight customers, while simultaneously disappointing them in nearly every channel”  
- Forrester Analyst, Kerry Bodine

## Conclusion : Entering the ‘Age of the customer’

Forrester Research recently labelled the current economic environment as the "age of the customer," where companies will survive or fail based upon their ability to deliver better customer service than their competitors. That's why, in a recent blog post, Forrester Analyst Kerry Bodine asserted that companies need to step up their commitment to providing superior customer service – no matter when, where, or how they interact with their customers.

“For decades, companies have been promising to delight customers, while simultaneously disappointing them in nearly every channel,” Bodine wrote. In order to succeed in the “age of the customer,” Bodine added that those companies that leverage great customer experiences will:

- > Bolster Brand Equity
- > Boost Revenue; and
- > Garner Customer Loyalty
- > Drive Down Costs

By tapping into the power of the cloud and developing integrated ecosystems for their service organisations, progressive companies have shown the ability to lower costs and keep everyone connected to the information they need — when they need it. Companies like Solta Medical and many others have dramatically improved the performance of their field service teams by integrating the intelligence gathered from their teams with other key areas of the enterprise.

These companies now have better visibility into key metrics across their organisations for better internal efficiencies. These tools have enabled colleagues to collaborate, communicate and share data more effectively, which lowers costs and improves productivity and time-to-resolution. Finally, by making their team more responsive to customer needs, these organisations have also seen substantial increases in customer satisfaction rates.

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