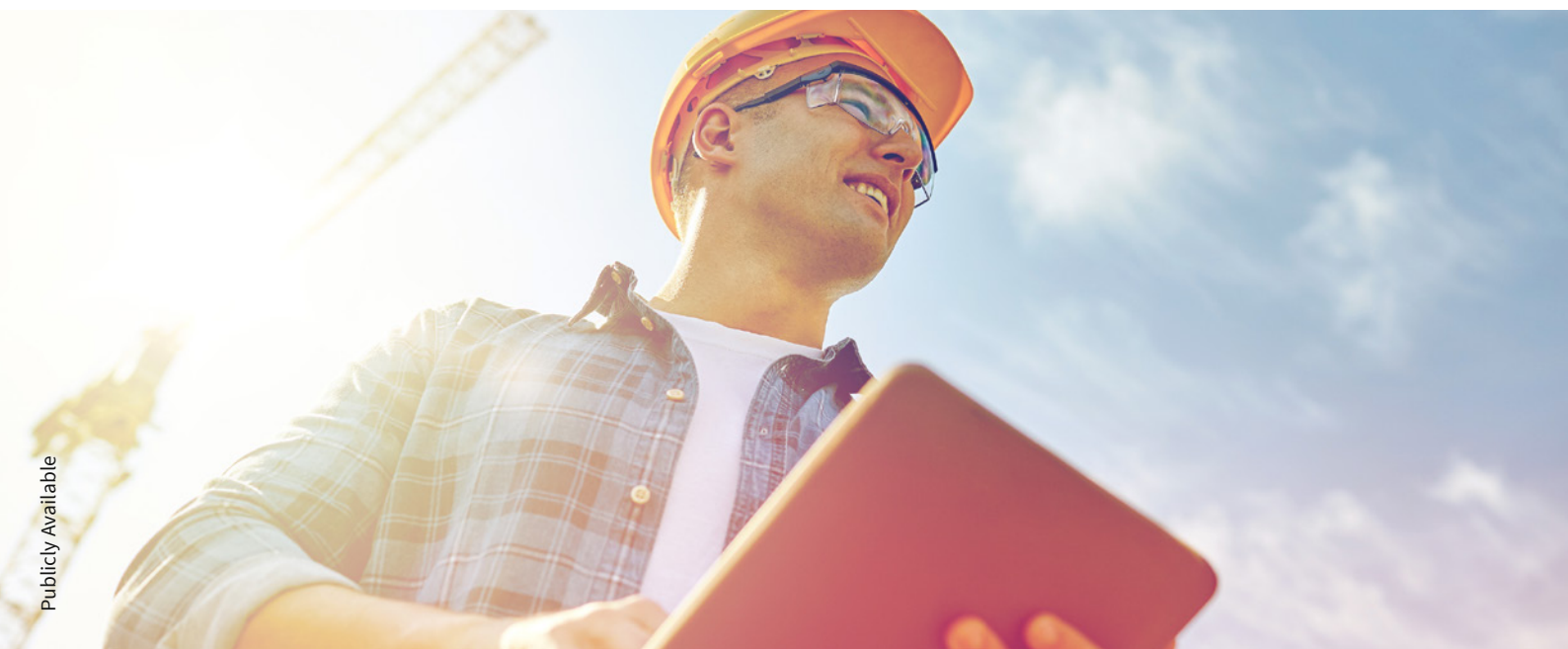


10 ANSWERS TO KEY QUESTIONS ABOUT CHOOSING A FIELD SERVICE MANAGEMENT SOLUTION

10

*Why use a field service **management** solution? How can you increase **productivity**? Should your solution be installed or reside in the cloud? Should it be subscription-based? How much should you expect to invest? What are the essential components of a Field Service Management solution (FSM)? What are the risks if you don't get the right FSM solution? These are some of the key questions you should be asking before you start a search for a FSM solution.*

This how-to guide provides 10 tips to help you choose the right solution to manage field service technicians.



Why should you use a field service management solution?

Question #1

EXPERT ADVICE:

FSM makes a field technician's life easier

«The solution is hugely beneficial for field technicians in their day-to-day work. They have all the information before making the service call so they can anticipate what they need to do, get the right equipment, and input information in easy-to-use forms that help ensure quality of service. Monitoring of maintenance operations is also much better so the quality of service improves considerably. It makes the field technician's life easier so much so they cannot do without it. Frankly, our technicians would be willing to pay for their subscriptions themselves.»

Philippe Fernandez, Development and Operations Director, GEOMS Group

Key benefits of field service management solutions

- ❑ Remove paper from the process
- ❑ Save time (planning/working/billing)
- ❑ Verify and monitor service calls
- ❑ Improve quality of service

33%

Businesses with a field service management solution improve their technicians' work time by 33¹

The main reason companies choose to use a field service management (FSM) solution is to improve productivity. These improvements include saving scheduling time, optimizing routes and travel time, saving fuel, maximizing technicians' workload, avoiding duplicate data entries, as well as speeding up invoicing.

Another reason is that a FSM solution improves quality of service and customer satisfaction. That's important because an effective FSM solution helps a company better meet contractual commitments to its customers and prime contractors. How? By moving from a paper-based work order process to a digital and online process, it is possible to achieve higher performance standards. In particular, tracking and monitoring service calls in real time greatly enhances quality of service.

For instance, a digital solution provides the customer with proof that the work has been done. After the job completion, a work order report is filled out using a mobile device and transmitted in real time to whoever is responsible for its review. Moreover, a FSM solution can handle all types of service requests from customers, including emergencies. On top of that, the real time communications enabled by mobile technologies allows FSM providers to inform customers about the progress of their job using text messages or email.

Question #2

How to determine if a field service management solution applies to your business?

3,7

On average, a technician performs 3.7 work orders per day.²

A field service management solution is best suited to companies with technicians who operate, install and maintain equipment in the field.

A FSM solution is most beneficial when field technicians complete **several work orders per day at different sites and when the workday is regularly interrupted by emergencies or schedule changes. Types of unforeseen circumstances** may include customer absences, bigger problems than expected, and missing tools. In these cases, there's a **high level of complexity to planning and monitoring service calls. An effective** FSM solution can handle these challenges. Among other things, it enables the manager to plan and optimize schedules and resolve emergencies quickly. With a FSM solution, there are even more operational benefits: the manager can predict **travel and job times** based on recorded online records, operations' logs for work carried out at the customer's site, or the inventory supply levels for materials to be used during a job.

The field technician also benefits from a FSM solution. Using a mobile app, the technician can easily access the work schedule along with all the data needed to carry out the service call. With customized forms, guidance for each type of work order is provided. Plus, data entry is instant and secure. And, as soon as the job is complete, the report is sent automatically to the service center for the invoice.

EXPERT ADVICE:

How to deal with unforeseen situations in field service planning

«A field service management solution is perfectly adapted to field technicians. It is a profession where the hazards are particularly numerous. Indeed, a field service management solution gives them access to real-time and essential information about the work order, updates on possible changes to the schedule, and status reports on the parts inventory. The solution also allows them to report on the work order status and to exchange information in real time with a remote expert to solve an unknown problem. A field service management solution of this kind quickly proves its effectiveness. Once they try it, technicians and managers can't imagine doing without it.»

Pierre Lavigne, CTO, co-fondateur - Praxedo



A FSM solution is ideally suited to companies that has:

- ❑ Field personnel
- ❑ Technicians that address multiple service calls per day to different sites
- ❑ A centralized work order planning team
- ❑ Paper-based work order reports, specifications and processes that can be digitized
- ❑ Customers that require work order **traceability**

Is the solution compatible with your information system?

Question #3

There are two approaches for choosing a FSM solution:

The first way is to use the FSM features available in your current information system. For example, some ERP or CRM solutions provide field service management functionality that can be activated or added. However, this option may only offer a one-size-fits-all solution that may lack flexibility. Put differently, the features are often limited because managing service calls is not the primary purpose of an ERP or a CRM.

The second way is to choose a best-of-breed FSM solution offered by a proven specialist. This type of solution can be interfaced with your existing information system. **The advantages of a specialized FSM solution are its functional depth and configurability.** It may offer connectors or easy integration capabilities that allow you to leverage the best of both worlds: on the one hand, your existing ERP or CRM and, on the other, your specialized solution for FSM.

So, how can you pair your field service management solution with your information system? Here are the possibilities:

1

Some solutions offer a “off-the-shelf” connector, which connects the contents of the ERP/CRM systems to the field-service management solution.

The deployment is done quickly, generating little extra work for the client’s IT department. For example, Praxedo offers connectors for **the Sage 100 Suite, Sage Business Cloud Financials (formerly SageLive), Sage Enterprise Management (formerly Sage X3), Salesforce and Intuit QuickBooks Online.**

2

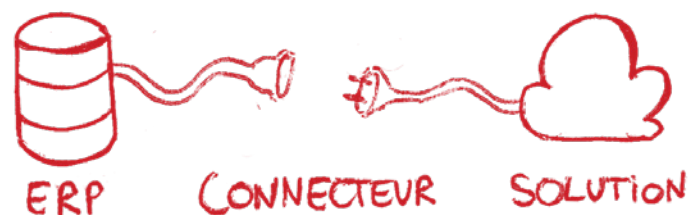
The API (Application Programming Interface) is an interface for communicating between two kinds of software. It links the information system with the field management solution. This requires **computer skills and programming time.**

3

The two previous options imply cloud-based applications. This is the case, for example, with an ERP, such as Sage, or a CRM, such as Salesforce. It is worth noting, however, that if you use a homegrown information system, you will need to carry out customized computer development in order to connect it with the field service management solution.

Tip

Before choosing your field management service solution, make sure that it is “open”. That is, ensure that it has either the connectors to your existing applications or the APIs that interface easily with your information system.



Question #4

Which mobile device should you choose for your technicians?

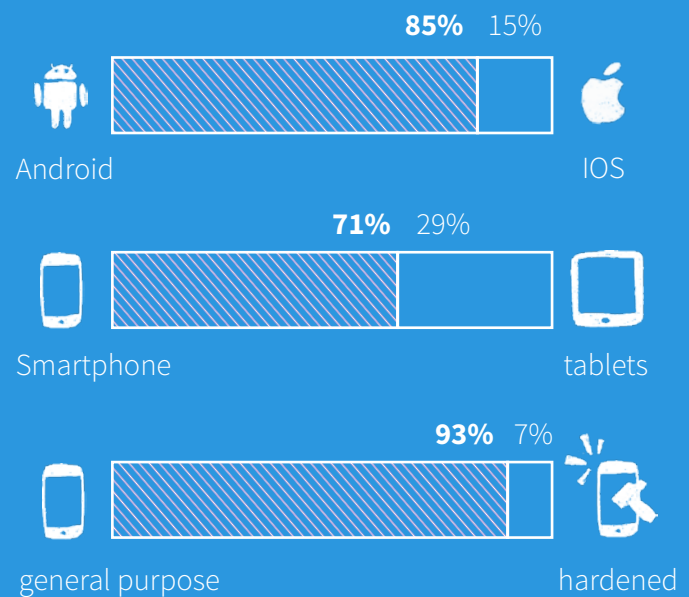
Technicians often work in difficult conditions. In fact, when talking about equipping technicians with mobile devices, it is necessary to choose the size of the screen (smartphone or tablet), the type of equipment (general purpose or hardened), as well as the operating system (iOS or Android).

A hardened mobile device (smartphone or tablet) is designed to withstand challenging environments with high levels of dust, humidity and water, extreme temperatures, as well as shock and vibration. These conditions can degrade electronic equipment. General-purpose devices, for their part, can be reinforced with cases to protect them.

No matter the environmental conditions, the recommendation is clear: the FSM solution **must work on all types of mobile devices** — regardless of the operating system and the manufacturer. What is needed is a **multi-device and multi-OS solution**. Indeed, it is actually more profitable and less restrictive for a company to manage a fleet of heterogeneous mobile devices, or even authorize the use of personal devices (Bring Your Own Device or BYOD).



According to a representative survey conducted among 500 customer service companies that use Praxedo, these are the types of mobile devices used:



Considerations when choosing a mobile device for technicians:

- ❑ Do your technicians work in harsh environments (e.g., high humidity, temperature extremes) where hardened devices are needed?
- ❑ Is your FSM vendor mobile app compatible with your organization's mobile device operating systems (Android and/or iOS)?
- ❑ Does the FSM vendor still support the older versions of Android, iOS or Windows Phone?

To what extent can a fsm solution improve quality of customer service?

Question #5

A FIELD SERVICE MANAGEMENT SOLUTION CAN BE A GOOD SELLING POINT FOR SUBCONTRACTORS

Many service companies outsource equipment installation, repair or maintenance to subcontractors. When deciding which bidder should be awarded a tender, having a proven field service management solution can be an asset. For this reason, companies usually **describe their field service management systems in response to tenders**, including processes, software, and types of devices used. Use of an FSM can be perceived as an indicator that the service provider provided higher quality of service.

According to Aberdeen, the customer's requirements for service improvements are the most important reason to adopt a field service management solution (75%), followed by the increasing the number of contracts to be managed (50%), and the rise of competition (49%).³

In the digital age, customers expect to be informed in near real time about the status of their services. This is particularly true of emergency service calls. **Keeping customers informed is critical to satisfaction levels and may play a part in determining, the success of a maintenance contract renewal.**

That's why, before choosing a FSM solution, you need to know that it has a **customer communications module**. For example, the FSM solution should be able to automatically send text messages or emails informing end customers of the status of their service call. These updates might include messages, such as "on the way," "in progress," or "job complete."

What's more, mobile technologies make it possible to trace all actions carried out in the field: to certify, for example, an arrival or departure time at the location of the service call using a GPS survey, or taking a picture of a work site. As a result, the end customer is informed in real time of the status of the service call. Commitments with subcontractors, while measuring, for example, response and recovery times can be efficiently monitored.

Is your service offering meeting the expectations of your customers and contractors?

- ❑ Can you quickly trigger a visit to a client site following an urgent service call request?
- ❑ Can you keep your client informed in real time of the status of a service call?
- ❑ Can you measure and validate the quality of field operations outsourced to contractors, such as rate Response Time Guarantee (GTI) and Recovery Time Guarantee (GTR)?

Question #6

How does a field management solution improve productivity?

47%

The reduction of margins (47%), the adaptation to the evolution of the customer (43%) and the increase of competition (43%) are the main concerns of service providers⁴

- **Optimize scheduling of service calls:** A well-designed FSM solution stores records and data in one place and enables business data analysis. This allows makes it possible to more accurately estimate the duration of work orders, and travel times in addition to knowing the work order past history at a location. Coupled with a geo-location capability, the data gathered generates **accurate indicators**. This **optimizes** technicians' schedules and maximizes their load rates.
- **Increase technicians' effective working time:** By going paperless, time wasted on unnecessary trips and tasks can be eliminated. This lets the technician spend more time on duty and less time driving or doing paperwork. Having to report to the operations center in the morning and later returning to drop off work order reports, making status update calls, as well as getting information about upcoming jobs wastes valuable time and reduces the technician's productivity. Plus, there is the time spent going to the depot to get spare parts.

In an increasingly competitive business context, customers are less loyal, and pressure on prices is mounting. To cope, service businesses need to improve productivity. One of the best means is adopting a **FSM solution that delivers productivity gains on several fronts:**

- **Increase revenue (upsell/cross-sell):** Technicians can be good at seeing **opportunities for upselling**. Normally, when a customer asks for a quote and the technician must contact the operations center to make a written offer, it slows down the process. And, if the paper gets lost, the opportunity goes with it. By contrast, using a well-designed mobile app for FSM, the technician becomes an effective salesperson, able to immediately provide an estimate to the customer.
- **Speed up the billing process:** A FSM solution connected to an internal IT system allows the operations centre to handle billing directly once the service call is completed. The invoice can then be generated and sent to the customer on the same day.



A best-of-breed FSM solution provides data about the:

- ❑ Percentage of appointments made on time
- ❑ Travel time of routes
- ❑ Number of service calls completed per day per technician
- ❑ Time spent on service call at the customer location
- ❑ First time fix rate (resolution percentage at the first visit)
- ❑ Rate of compliance with service level agreements and recovery times

Which is better, an installed or a cloud-based solution?


Question #7

There are two ways a FSM solution can be delivered: an installed solution or cloud-based.

Using the traditional approach, the software is installed “on premises” i.e. the company’s servers. The company purchases the software permanently through a license acquisition. This type of solution is best suited to companies that want to retain their data on their own servers and have IT resources to do so. The main drawback to this approach is the relatively long time to deploy and the often costly software updates. In addition, an on-premises solution can be difficult for the company to personalize. Adaptations may require custom IT development and additional expense.

An alternative approach consists of getting a Software as a Service (SaaS). The company subscribes to using a solution “in the cloud”, which means hosting is provided by the vendor. The off-the-shelf cloud-based approach has become increasingly popular because its many advantages including:

- Zero deployment time because the solution is activated using a web interface.
- Zero capital investment because the service is usually paid for by a monthly subscription fee per user.
- The solution can be tested beforehand using the “try before you buy” approach. Indeed, most SaaS solutions offer free demo accounts for periods ranging from 7 to 30 days.
- Cloud solutions offer increasingly high quality of service and rich features.
- Cloud solutions are flexible and customizable to fit your business needs.
- Data is secure in state-of-the-art data centers. The level of security is often much higher than if your data were hosted on a server within your company premises.



Choose a cloud-based solution to:

- ❑ Be up and running quickly
- ❑ Avoid consuming internal IT resources
- ❑ Focus on your business and not waste time and energy developing your own IT solution
- ❑ Enjoy greater functional flexibility
- ❑ Try before you buy



Question #8

What should you consider when choosing the right vendor?

Before choosing a FSM vendor, you need to make sure that the project will be successful and you need to avoid hidden costs. To do this check into the following strategic considerations:

- **The solution's functional depth:** What are the features offered by the solution? Do they address your priorities? Is it a fixed or a configurable solution? Remember: By assessing the functional depth of the solution you can make sure that the solution meets your needs.
- **The solution's degree of openness:** The solution should easily interface with your information system, including your ERP, CRM, and billing management software. The best solution will provide easy connectivity to your IT infrastructure using native connectors or APIs and Web Services to establish a flow of data.
- **Roll-out support:** Ensure that your FSM vendor offers comprehensive implementation support services. Indeed, you will need this support to train internal users, planners, and technicians. Find out about the training methods offered. Is it remote or on-site training? How long does the support last? Is there an additional cost for training or is it included in the price of the solution?
- **User support:** Once the solution has been implemented, does the vendor provide user support? If so, is this support provided in the language of your users/technicians? What are the support hours? Is it free or paid support? What are the vendor's response times?

- **Business references:** Does the FSM vendor have customer references in your industry? This is an important point; the best sources are real customers who can share their real-world experiences with the solution.



To evaluate the total cost of ownership (TCO) remember to include the:

- ❑ Cost of the solution license or subscription
- ❑ Cost of setup/implementation/roll out
- ❑ Cost of hosting the solution
- ❑ Cost of updates
- ❑ Cost of training users
- ❑ Cost of user support, once the solution is deployed

EXPERT ADVICE:

Technology is a tool that should adapt to your needs

«**Adapting your organization around the technology is a bad thing.** Instead, start by considering the company's needs. From this point, two important points must be kept in mind:

- **The solution will never address 100% of situations:** It is important to prioritize the key requirements and to identify those which are non-essential. Developing a company-specific tool to integrate less important features may be too costly given the benefits.

- **Do not digitize your processes based on the paper process:** A common mistake is to evaluate the solution's target process based on the constraints of the current traditional process. Better to rethink your processes to take advantage of a digital FSM solution.

These two pitfalls must be avoided so you can focus instead on driving improvements and user adoption of the FSM solution.»

Jean-Baptiste Maheo, Sales Director Praxedo



Questions to ask before investing:

- ❑ What **hardware and IT personnel resources** do you have?
- ❑ Are you ready to **take on a development project** during a year or more?
- ❑ Is your business evolving rapidly or are your activities substantially the same from year to year?
- ❑ Have you considered the total cost of ownership of software in your IT system?

The three barriers to deploying a solution for technicians: Resistance to change (48%), cost of technology (47%), uncertainty about ROI (36%).⁵

As with most technology adoption decisions, the budget can be seen from two perspectives:

- **As an investment:** This applies to software solutions that are acquired and owned by the company. With this approach, companies must be wary of hidden costs, including software upgrades or maintenance releases. Indeed, investments are needed regularly to update and modernize the solution to add new features, connectivity, or adaptations for other mobile devices.
- **As a subscription service:** This approach can sometimes seem costly in the long term, especially over 7 to 10 years. However, this approach offers a big advantage: no initial investment is required to deploy the solution and the cost is proportional to actual usage, based on the number of users. In addition, there are no hidden costs because hosting, maintenance releases, and software updates are usually included. In addition, the return on investment (ROI) of the subscription solution is immediate: technicians need only complete one more work order per month to cover the cost of the solution.

Question #10

Can you really afford to wait?

75%

*75% of companies with more than 50 field technicians use a field service management solution.*⁶

When considering all the FSM options, you might think: “it will be too expensive,” “we don’t have the time,” or “we’ll see about it next year.” Before postponing adoption of a FSM solution, think about how much it is already **costly to not have** a FSM solution. Did you know, delayed adoption

of a digital field service management solution could have negative **consequences including:**

- **Poor productivity** due to outdated and time-consuming field service practices.
- **Reduced revenue and profitability** due to lost sales from being undercut by competitors that have a lower cost structure.
- **Lost market share** to competitors that have already adopted a field service management solution.
- **Missed opportunities to enter new markets** because some original equipment manufacturers (OEMs) require service providers to use digital field service management processes.

In other words, inaction could be harmful to the company’s sustainability. The better option is to conduct a free test of a cloud- and subscription-based field service management solution and see how it can work for your business.

EXPERT ADVICE:

Expert advice: Better to make incremental improvements than do nothing at all

«For small and medium-sized field service companies, digital business process transformation is often perceived as costly, difficult and time-consuming. That’s why some business managers postpone their decision. The best approach is to test the new FSM solution with a small team. By using a cloud-based solution companies can quickly test and see the results without having to involve too many people. Based on initial results, the FSM solution can be fine-tuned and the roll-out to other teams can be progressive.»

Jean de Broissia, Founder of Praxedo



If you don’t set up a FSM solution, you could:

- ❑ Damage productivity because processes are not optimized
- ❑ Undermine profitability due to lower prices from competitors
- ❑ Lose market share to better equipped competitors
- ❑ Miss out on new markets because your contractors require real-time tracking of outsourced operations

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