

FIELD SERVICE MANAGEMENT: WHY YOU'RE PROBABLY DOING IT WRONG



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Working on paper is slow, expensive, and comes with significant risks



We live in a modern, digital world where we're surrounded by technology all of the time. And we rely on that technology more than ever — to work, to manage our lives, and to have fun. The global pandemic has shown us how we can use technology in new ways, and in more aspects of our lives. There will be no going back.

As a field service provider working in the “new normal”, you'll need to meet increasingly high expectations for digital operations from your customers and your employees. If you continue working on paper, emails or disconnected web-based tools like Google or DropBox, you won't be able to meet those expectations. And you'll face significant business risks:

- **Lower profits.** Dealing with paper and emails at each stage of service delivery is time-consuming and cumbersome. The need to manually exchange pieces of paper slows service delivery, forces technicians to frequently return to the office, and extends billing times. These inefficiencies quickly eat into profit margins.
- **Lost data.** Those many pieces of paper contain business-critical data you need for comprehensive and accurate billing. But paper is easily lost, misplaced, or damaged in the field. Handwritten service reports that are incomplete, illegible, or inadequate for billing purposes further increase risks.
- **Poor customer perception.** Delayed service and old-fashioned ways of working give customers the impression your business is behind-the-times. And it's all-too-easy for customers to assume this lack of sophistication also reflects your technicians' capabilities and expertise levels.

The losses associated with outdated operations quickly add up

These risks affect every area of your business. It's a vicious circle, with every loss compounding on another.

At a minimum, you'll fall behind the competition. In the cost-conscious, and often crowded, world of field service, you need every possible advantage to edge out competitors. With fewer ways to differentiate and make a strong, positive impression on customers, it will be far more difficult to stand out in the crowd.

You'll also lose valuable technicians, especially those who grew up with digital devices in their hands. They'll quickly become frustrated with old-fashioned, inconvenient, and unwieldy ways of working and jump to your more technologically advanced competitors.

Sales opportunities will decline. Customers who have a poor perception of your business are unlikely to expand their relationship with you, or recommend your services to other businesses. And, if they share negative reviews of your services, it will influence the decisions of other potential customers.

- 9 out of 10 Americans tell others about their service experiences.¹
- The probability of selling to an existing customer is 60 to 70%, compared to 5 to 20% for new prospects.¹

Finally, you will lose customers. Customers can choose who they work with. And their expectations are high. If customers don't feel your business is responsive enough, or your technicians are adequately informed and equipped to look out for their best interests, they won't hesitate to switch providers.

« When field service providers can retain customers and renew contracts, they can spend less time worrying about how to win new business simply to make up for customers they've lost. It becomes much easier to grow the business. »

Jim Baston, field service industry expert

- 33% of customers would consider switching companies immediately after poor service.²
- 60% would consider switching after 2-3 instances of poor service.²

Field service providers who are working on paper simply cannot afford to continue working as they are.

It's time to go digital

The good news is field service providers no longer need to struggle with slow, outdated, and disjointed ways of working. There are affordable technology solutions that address the challenges and risks they currently face, and bring additional business benefits.



The right field service management software massively increases efficiency



With cutting-edge field service management software that's delivered from the cloud, you can access the technologies you need most in a fast, easy, and cost-effective way. You can smoothly evolve from yesterday's way of working to today's and tomorrow's way with minimal disruption and predictable costs.

Work order management and scheduling are intelligent, automated, and consistent

Centralized management of digital work orders streamlines and accelerates work order creation and processing. Work orders are customized for your business and your operations to ensure they match the way you work. And there's a logical and consistent approach to work order management across your entire organization.

Work order scheduling is also faster, easier, and more intelligent. The software automatically creates the optimal schedule for every technician and every job based on constraints and requirements such as:

- Technician availability
- Technician location
- Skillsets required for the job
- Customer location
- Customer time constraints
- Level of urgency

Schedules are at your fingertips in seconds. You can automate scheduling of recurring work orders based on customer, site location, or equipment type. And you can immediately find the right technician, with the right skillsets,

to handle emergency situations, even if that means rescheduling other appointments.

Travel routes are optimized

The software recommends the best travel route to job sites and between job sites, considering factors such as time of day, traffic congestion, and construction. As conditions change throughout the day, you can easily reoptimize and update routes to maintain maximum travel efficiency.

Technicians spend less time on the road, and have fewer travel-related frustrations to deal with. And you can reduce fuel consumption and wear and tear on vehicles.



You're more connected with customers

The software also allows you to set up automated emails and notifications so customers are informed in real time as their work order progresses. They know when their job has been scheduled, when technicians are on their way, and when the job is complete, whether they're present at the job site or not.

« It's much better for customers to know exactly when technicians will arrive rather than having to wait around for hours for someone who finally shows up at the end of the day. »

Jim Baston, field service industry expert

Invoicing is faster

There's no need to worry about losing business-critical data. Electronic service reports that are fully customized for your industry, customers, job types, spare parts, and other factors make it fast and easy for technicians to capture all required data while they're still in the field. Technicians can complete the service report on their mobile device and immediately send it back to the office for processing and invoicing.

Because the field service management software seamlessly integrates with your enterprise resource planning (ERP), customer relationship management (CRM), or accounting software, all report data are automatically populated in the system so there's no need for manual data entry.

Performance is highly visible

Real-time reporting on key performance indicators (KPIs) gives you immediate visibility into how work orders are progressing in the field. You can see KPIs, such as the:

- Number of completed work orders
- Number of work orders tracking on schedule
- Actual time to complete work orders
- Number of work orders that started at the scheduled time
- Number of work orders meeting service level agreement (SLA) commitments

With historical analysis of these same KPIs, you can identify trends — good and bad — and take the appropriate actions.





A mobile app empowers technicians, enables differentiated customer service

Equipping field technicians with a mobile app gives you additional opportunities to increase efficiency. But it does much more than that. A mobile app is key to delivering the extremely high service levels needed to enhance customer relationships and differentiate from the competition.

The app runs on any mobile device, and is connected to the software used in the office. It gives technicians any-time, anywhere access to all of the information they need throughout their day, even when they're working in locations without cellular or Wi-Fi coverage. Technicians have the resources and flexibility they need to work smarter, take on more responsibilities, and increase customer satisfaction at every step throughout their day.

All schedule and travel information is at technicians' fingertips

There's no need for technicians to start their day from the office, or return to the office to check the latest schedules. Technicians can see their appointments, map-based views of the optimal travel routes to job sites, and detailed work order descriptions at a glance on their mobile device. And they can automatically communicate job progress to office staff by changing their status in the app.

Technicians also have more flexibility to manage their own schedules. If they finish a job early, they can schedule themselves for nearby jobs. They can also create work orders on the spot if new opportunities or requirements emerge during the day. They can reschedule jobs if needed, and are instantly notified if office staff reschedule a job while they're on-the-move.



Technicians arrive on site fully informed and prepared to act as a trusted advisor

All customer information, including the site address, contact details, and customer history are also available through the app. Before they arrive, technicians can review reminders and tips for working at the site, as well as any previous recommendations made to the customer by company sales staff and other technicians. They can also check spare parts availability and locations.

Technicians' ability to review all of this information while they're in the field means they always arrive on site fully prepared and equipped to efficiently execute on the job, and to have informed conversations with customers — whether they're answering questions, reviewing maintenance packages, or explaining service options. And there are no delays or mix-ups if customers have multiple sites and different types of equipment.

Technology empowers technicians to enhance customer relationships

According to field service industry expert, Jim Baston, technicians are extremely important brand ambassadors for field service providers, and technology plays a key role in helping them strengthen and expand customer relationships.

"The more technology can be used to help technicians focus on the customer relationship aspects of the business, the better it is," he says.

Baston also highlights the value of fully informed technicians. "It's very important for technicians who are in front of customers to look like they're fully in the loop, ready to answer questions, able to proactively make, and follow up on, recommendations for additional services, and provide a quote on the spot," he says. "Technology gives technicians the information and insight they need to elevate themselves to the role of a trusted advisor that customers rely on. That's a real point of differentiation in the field service industry."

Service is faster, first-time fix rates are higher

During the service call, technicians can use the mobile app to access real-time solutions to real-time problems. They can check data sheets, technical guides, and checklists of procedures to follow when troubleshooting or repairing specific types of equipment. They can also exchange instant messages and photos with other technicians and company experts to get immediate assistance to challenging problems.

Service reports are always accurate, complete, and instantly available

When service is complete, technicians can impress customers by immediately providing the completed electronic service report for validation. The report form includes mandatory fields, and is designed with checkboxes and drop-down lists so it's fast and easy to complete, and ensures technicians provide all required information.

Technicians can even collect customers' electronic signatures and attach photos that illustrate the extent of the problem and verify the repair was properly completed.

The benefits of a mobile app really add up

At the end of the day, giving technicians a mobile app helps you build every aspect of your business. You can:

- **Increase profitability** by providing faster, more responsive customer service, improving first-time fix rates, and accelerating billing.
- **Differentiate from the competition** by empowering technicians to become trusted advisors that add value for customers at each stage of service delivery.
- **Grow your business** by expanding your relationship with existing customers and attracting new ones through referrals from happy customers.
- **Improve technician satisfaction and retention** by giving them the flexibility and freedom to take more initiative and achieve greater success.

« There's a significant opportunity for field service providers who recognize the difference between serving customers and selling to them. When technicians make informed and helpful recommendations in the field, it must be in the context of providing better service. The worst thing a service organization can do is try to turn their technicians into sellers. »

Jim Baston, field service industry expert



Just as field service providers' customers need a trusted advisor, so too do field service providers. Praxedo is that trusted advisor. We understand how field service providers can use cloud-based software and a mobile app to work more efficiently, dramatically improve customer service, and differentiate from the competition. Our software delivers all of the capabilities and benefits you just read about.

At Praxedo, we dedicate all of our resources to developing the ultimate field service management software. It's our sole focus, not a sideline, or one of many different offerings. We've been delivering on the promise of better mobile workforce management since 2005, and we now serve more than 1,000 customers in the field service industry globally.

Our achievements are recognized. Every year since 2016, Praxedo has been included in the world-renowned Gartner Magic Quadrant for field service management.

Leading field service providers rely on Praxedo

Field service providers of all sizes, and in all industries, partner with Praxedo. Our customers include well-known multinational corporations with hundreds of field technicians as well as smaller organizations and those that service niche markets.

We're able to partner with such a wide variety of organizations because our cloud-based field service management software and mobile app deliver a combination of flexibility, scalability, simplicity, and features that is unique in the industry.

As a Praxedo customer, you can:

- Choose the features, functions, and pricing that make the most sense for your business today, then easily add new capabilities and support more users as your business and budget grow.

With features ranging from web-based scheduling with real-time monitoring and route mapping to extranet access for contractors, in-depth analytics, and mobile stock management, every field service provider can choose the features and functions they need most. Our subscription model means you only ever pay for the capabilities you use, and predictable pricing makes budgeting easier.

- Start taking advantage of the Praxedo software in just a few days rather than the weeks or months other solutions require to implement. You can easily deploy the solution yourself, let our experts take care of everything for you, or get assistance when and where you need it.





« Praxedo helped us improve our responsiveness and reliability. With the electronic service reports that are instantly sent after each job is completed, we've been able to reduce our invoicing times from 5 weeks to 24 hours. »

Jean Luc Morand, Technical Services
Director at Henry Schein

« Before we started using Praxedo, it was all managed by hand with Excel files, emails and phone calls to monitor our work orders. Now that we have successfully implemented Praxedo, the information flows much more smoothly. »

Christian Couzon, Business Unit
Manager at Axians



« The Praxedo Support team has been so helpful: their effective assistance is priceless and has been critical for the success of our project. »

Josie Ann Osborne Procurement Team
Lead at Boardwalk

« Praxedo has improved our overall customer service. (...) We have seen each technician realize approximately 10 percent growth in completed jobs per month. »

Ryan Barefoot, Vice President at
Snake'n'Rooter





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