



10 THOUGHTS ON EVALUATING A FIELD SERVICE AUTOMATION SOLUTION

INTRODUCTION

The availability, low cost and ubiquity of mobile devices and mobile networks has fostered a revolution in how field service organizations operate. Smartphones and tablets running purpose-built field service automation applications are replacing paper work orders. These same applications are also transforming the back office by automating quote, work order and task creation as well as scheduling, dispatch, customer management (including assets), inventory management, invoicing and time sheets. Finally, field service automation applications often include in depth reporting capabilities that enable managers and business executives to keep their collective fingers on the pulse of their businesses.

Field Service Automation Solutions should be: made for mobile, flexible, easy to use and reliable.

Many companies have already increased business productivity by 27 percent, revenue by 17 percent and customer satisfaction by 19 percent by using a Field Service Automation Solution.¹ a number of solutions and methods of delivery available, how should one go about choosing the “right” Field Service Automation solution for their business?

At FieldAware, we believe the keys are flexibility and mobility. The best Field Service Automation solutions accommodate new processes and capabilities as a company's needs evolve, while extending the value of existing IT and mobility investments. We are also advocates of simplicity and usability, critical factors in encouraging user adoption and getting the most from the system.

Following are ten thoughts on evaluating a Field Service Automation Solution. We hope they help you choose a solution that will benefit your business, your customers and your staff.

1. CLOUD-BASED

Cloud-based Field Service Automation Solutions provide a number of cost benefits and can also be implemented more quickly and easily. Ensure that the solution is not just cloud-based however, check to see that it was designed for a cloud-based environment. Some solutions, although marketed as cloud-based, are really systems that were designed for on-site implementations. This limits their scalability and also may result in performance issues because they are not optimized for the cloud.

Key business benefits of a cloud-based solution include:

- Reduced capital spending on technology infrastructure (hardware and software)
- Improved business efficiency – new applications and capabilities without capital investment or the need to hire additional personnel
- More rapid implementation of new technologies and capabilities
- Elimination of hardware and software maintenance costs
- Predictable costs for technology and services
- Ability to choose and use the capabilities and services needed as they are required
- Data is automatically backed up (disaster recovery) by the service provider
- Uses technologies most companies already have in place – smartphones or tablets and the Internet

2. MADE FOR MOBILITY

Smartphones and tablets are everywhere and owned by nearly everyone – and there are a number of apps on the market targeted at field service organizations. Many of them, however, have limitations that can effect application performance (and usability) or send large amounts of data over the wireless network, resulting in inordinate data usage charges.

Look for a Field Service Automation Solution that:

- Is designed for the mobile environment – not a PC or Macintosh solution ported to mobile devices
- Includes native iOS and Android apps for smartphones and tablets – browser-based solutions, although compatible with a number of platforms, have slower performance and transfer larger amounts of data over the network
- Has the ability for mobile workers to use the app offline (when a network signal

Recommendation:
Obtain the business benefits of Field Service Automation quickly and without capital investment by choosing a cloud-based solution – one that was designed for the cloud.

is not available) – Apps that can be used when the device is not connected to the network enable remote workers to update work orders, invoice clients and create quotes and work orders even in remote locations. And, because they “sync” with the cloud (rather than remaining online at all times), they deliver faster performance while using less of the user’s monthly mobile data allocation.

3. FLEXIBILITY

Field service operations are made up of a plethora of people, processes, and parts. And, because field service is ever changing and evolving, it’s important that the Field Service Automation Solution that you choose has the flexibility to meet the demands of your business now – and later. That’s why we recommend solutions that are designed to be flexible and can be used in multiple ways in a variety of environments.

Many solutions however, are built on top of existing CRM or ERP platforms. And although this allows them to take advantage of the capabilities inherent in those systems, it also can limit their ability to meet operational demands or incorporate processes for which they were not designed.

We recommend that the system you choose should include:

- The ability to be used in a variety of ways or within a number of processes – For example: have the ability to assign work orders not just from the scheduler or dispatcher, but also from the work order itself or the job board.
- Methods to enable or disable functionality on remote devices – For example: shield price information or disable the creation of quotes and/or work orders on remote devices.

4. COMPATIBILITY

A number of Field Service Automation Solutions tout their ability to integrate with existing Accounting and other back office systems. The reality however, is that many of them only offer “connectors” or “mappers” – not a true API (Application Programming Interface). As a result, importing and exporting data from the Field Service Automation System often entails hours of manual labor and in some cases, missing or error-laden data.

We recommend solutions that include:

- A true API built on accepted standards for web API’s, i.e. the so-called ReST-full architecture

Recommendation:
Choose a solution whose business flexibility isn’t limited by a CRM or ERP platform that was not designed specifically for a mobile, cloud-based, field service environment.

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- API's that expose application entities through URL endpoints and enable generic operations across all exposed entities

5. USABILITY

To reach their full potential, Field Service Automation Solutions must be perceived by users as a tool that makes doing their job easier, faster and better. When that tool is easy to use, adoption is rapid and in many cases, can be used as a job benefit that helps retain staff and improve employee morale. However, poorly designed or overly complex solutions can make the adoption process long, arduous and expensive. And instead of making the job easier, complex systems can serve as a point of frustration and discontent.

We recommend Field Service Automation Solutions that are:

- Intuitive –It shouldn't take hours to learn how to operate the system (especially the mobile apps!)
- Enable users to get the information they need with just one or two "clicks", from anywhere – For example to assign and dispatch a work order should be one process (click or drag-and-drop) – not two!

6. CUSTOMIZATION

Every field service operation is unique. That's why it's important that you choose a Field Service Automation Solution that can be customized to meet the unique needs of your business.

Some things to look for include:

- Custom fields – The ability to add custom fields to customer data, work orders, inventory, etc. enables companies to seamlessly shift their business identity from paper to a mobile platform more quickly and easily.
- Information searches, sorts and views that can be saved and retained for later use – Users want the information they need, fast. Saved searches, sorts and views enable them to get the information they need on an hourly, daily, weekly or monthly basis quickly and easily.
- Customized information displays on mobile devices and company dashboards - Too much information can be as much of a problem as too little. Customized displays enable companies to give users only the information they need to successfully perform their tasks.

Recommendation:
Choose a solution that's easy to use and it will be easy to get users to adopt it. (And your company will realize the benefits of Field Service Automation even faster!)

7. BUSINESS VISIBILITY

What do managers and executives need every minute of every day? They need to know what is happening in their business. It's important therefore, that the Field Service Automation Solution you choose provides the information managers and executives need, simply, accurately and instantly.

Two Field Service Automation features are critical in delivering an up to the minute view of the status of any field service operation – the company dashboard and the scheduler.

We therefore recommend solutions that include:

- Company Dashboard – Customizable company dashboard that displays latest activities (jobs, customers, invoices, items, assets, suppliers, tasks and users), scheduled work orders, job status (completed, active and scheduled) with associated revenue and projected job revenue for the month.
- Scheduler – Gantt Chart and map based-display that includes drag-and-drop job scheduling and real time visibility into the location, status and history of every job. It should also allow companies to assign jobs to employees and contractors and filter views by location, technician(s), customer or job status.

8. BUSINESS INTELLIGENCE

Identifying business trends is critical to growing revenue, retaining customers and increasing the productivity of field personnel. It's also important as a means of discovering problems before they can significantly affect profitability. Reports are, therefore, an essential component of any Field Service Automation Solution.

Look for Field Service Automation solutions whose reporting capabilities include:

- A wide variety of built-in reports that cover every facet of your field service operation – customers, revenue, work orders, items, assets, inventory, etc.
- A large range of filters (customer, asset, work order, etc.) that can be applied to built-in reports – this enables users to customize standard reports and obtain the specific information they need, in useful and usable format
- Data export to Excel and other standard file formats (i.e. CSV- Comma Separated Values)

Recommendation:
Choose a solution that includes a customizable company dashboard and state-of-the-art scheduler to provide managers and executives with the information they need.

9. ON-BOARDING, IMPLEMENTATION & TRAINING

Migrating existing data and processes to the new Field Service Automation Solution is the most critical implementation process. It's essential that no customer data is lost and that processes that are fundamental to the business are retained. Additionally, to ensure adoption of the system by end users, access to training, in a variety of forms, is required.

Look for solutions that include:

- Three stage on-boarding process that includes account setup, data import and training
- Technical staff that is experienced in helping companies migrate not only their data, but essential business processes as well
- Variety of training resources that enable companies to allow individuals to access online resources, webinars or organize on-site training using "train the trainer" techniques

10. ON-GOING SUPPORT

Outstanding customer support is the final and yet perhaps the most important factor in choosing a Field Service Automation Solution. If a problem should arise, customer support must respond quickly. Additionally, an online knowledge base should be available for answers to non-critical issues or to determine if a mobile device is compatible with the chosen solution.

Find a solution whose support capabilities include:

- Highly trained, experienced technical support resources
- Extensive, online knowledge base
- Comprehensive catalog of technical and user information including: information on new releases, helpful videos and product documentation

Choosing the "right" Field Service Automation Solution is an important step in increasing the productivity of your staff, growing revenues, improving customer satisfaction and retaining skilled employees. We hope you'll find our "10 Thoughts" a useful guide as you discover the benefits a Field Service Automation Solution can bring to your company.

Recommendation:
Choose a solution backed by staff experienced in data and process migration strategies and also provides a wide range of end user training choices.

ABOUT FIELDWARE

We are re-shaping the field service industry! Our made-for-mobile, cloud-based software was designed from the ground up to provide ease of use with incredible flexibility – a combination that enables field service organizations to amaze their customers, astonish the staff and surprise the competition. Our software was architected as a mobile platform, with no incumbent legacy technologies to modify or migrate from.

Based on our founders' intimate knowledge of the unique needs of engineers and technicians in the field – and the operational personnel and management that support them – FieldAware is focused on providing field service organizations, both large and small, with:

- Intelligence about your Customers: So you can increase revenue, expand into new markets, differentiate your services and create customer advocates.
 - Intelligence about your Business: That enables you to increase the productivity of your staff (and keep them happy!), use company resources more efficiently, simplify your business processes and “right size” your parts and repair inventory.
 - We combine our software with the industry's best implementation, on-boarding and support services enabling companies to take full and rapid advantage of today's mobile environment.
 - To learn more about our solutions or to schedule a demo, contact your local FieldAware representative at fieldawaresales@fieldaware.com or by calling 800-935-0736.
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