RESEARCH BRIEF

MOBILE WORKERS BECOME *the* FACE *of* BRANDS

Insights and trends from over 3,000 mobile workers and field service leaders worldwide

salesforce research

About This Brief

Throughout this brief, data is examined relative to business performance to identify success patterns. High-performing mobile service teams are those that rate their company's customer satisfaction as excellent.

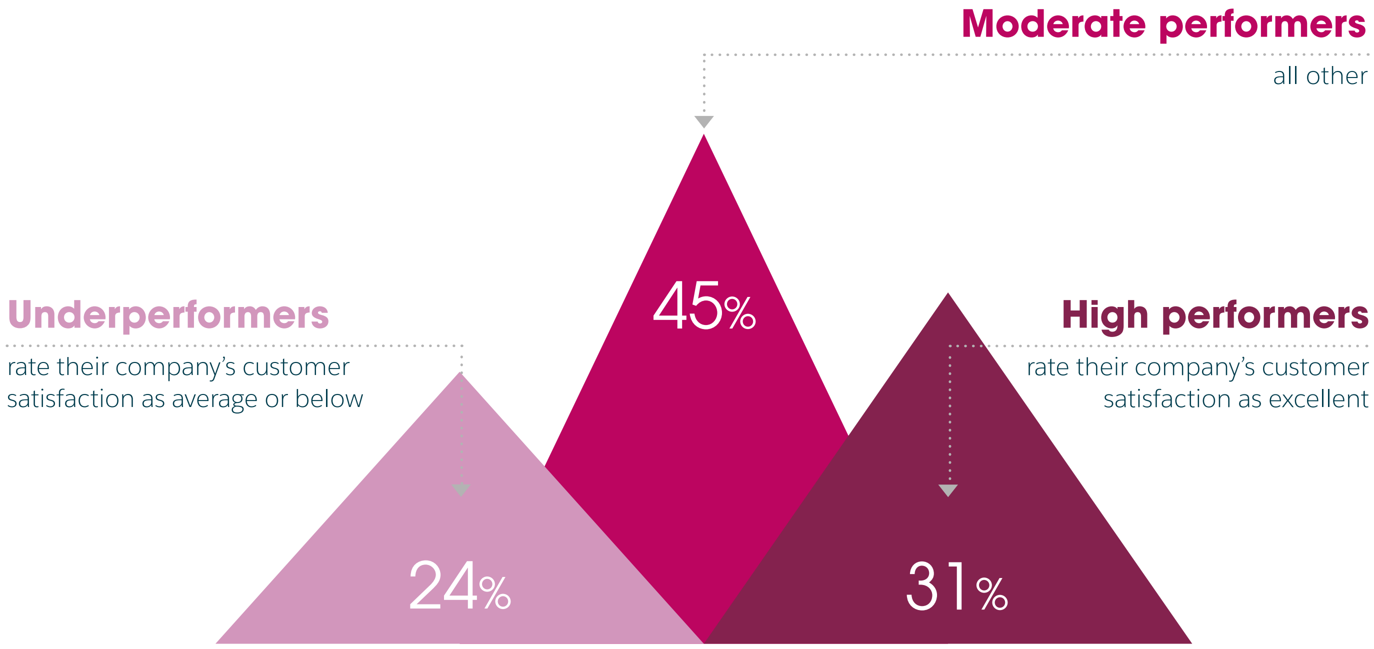
In this brief, we refer to the following respondent groups.

Decision Makers (1,695 respondents)
Service vice presidents, directors, and team leaders

Mobile Workers (493 respondents)
Front-line field service workers who interact with customers "in the field" at a customer's home or place of work

Breakdown of Service Performance Levels

High performers from the mobile workforce and the decision makers who employ them represent 31% of the survey sample across B2C, B2B, and B2B2C teams.



Introduction

Customer Expectations are Driving Field Service to Leap into the 21st Century

Customers are pushing companies to keep up with the innovation of the Fourth Industrial Revolution. With the lines blurring between B2B and B2C, companies need to re-evaluate their service strategies to adjust to a new type of customer and their elevated expectations.

This evolution is particularly evident in customer service departments, which are increasingly using bots and self-service to help customers get answers faster – whenever and wherever. However, in those instances when face-to-face service is required, mobile workers need to deliver the same level of engagement – and capabilities – as their office-based peers.

84% of customers say the experience a company provides is as important as its products and services.*

In-person service is a new competitive differentiator. Service leaders see opportunity to elevate their business and customer engagements through the mobile workforce, and are investing accordingly.

This research brief provides a snapshot of the state of mobile service, and what sets high-performing teams apart from their competition when it comes to moving from vision to reality.

*"State of the Connected Customer," Salesforce Research, June 2019.

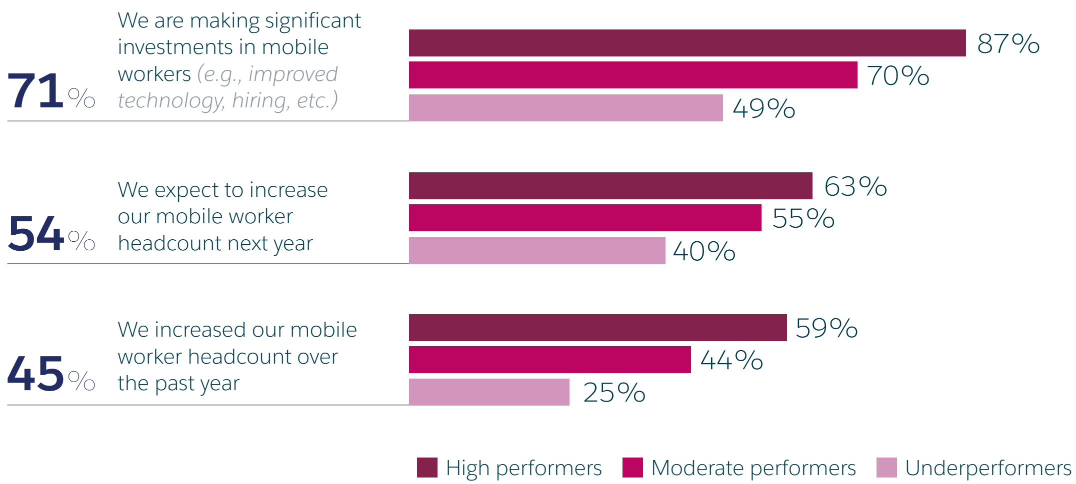
Service Organizations Are Investing in Field Service

Customers are 2.6x more likely to say service that *comes to them* is important versus unimportant.* It's little surprise, then, that **84% of service decision makers cite improved or expanded mobile service offerings and operations as a priority**.**

80% of service decision makers say mobile service drives significant revenue, and 79% say it provides *new* revenue streams.

The majority of service leadership with field operations are making significant investments in their mobile workers – such as through improved training or technology. More than half (54%) expect to increase their mobile worker headcount over the coming year. Top teams, however, have a head start on these investments. **High-performing organizations are 2.3x more likely than underperformers to have hired more mobile workers last year.**

Service Decision Makers Who Say the Following



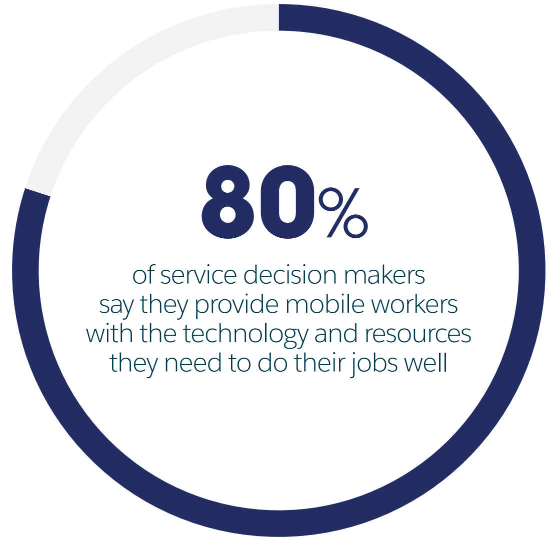
Unless otherwise noted, data represents responses of service decision makers with mobile workers.
* "Trends in Integrated Customer Experiences," Salesforce Research, September 2018.
** Data represents responses of all service decision makers with or without mobile workers rating as a high or moderate priority in the next two years.

Management Perceptions Don't Match Reality

Nearly nine out of 10 service decision makers agree that the experience a customer has with a mobile worker is a reflection of their brand. Four-fifths of them claim to provide mobile workers with all the technology and resources they need.

Yet leaders' perceptions of their mobile workforces' technological capabilities may not match the reality. Nearly half (49%) of mobile workers – including 66% of underperformers – toggle through multiple screens to complete their tasks. Nearly half (45%) – including 57% of underperformers – have wasted significant time because of inaccurate or outdated job information.

89% of service decision makers say the experience a customer has with a mobile worker is a reflection of their brand.



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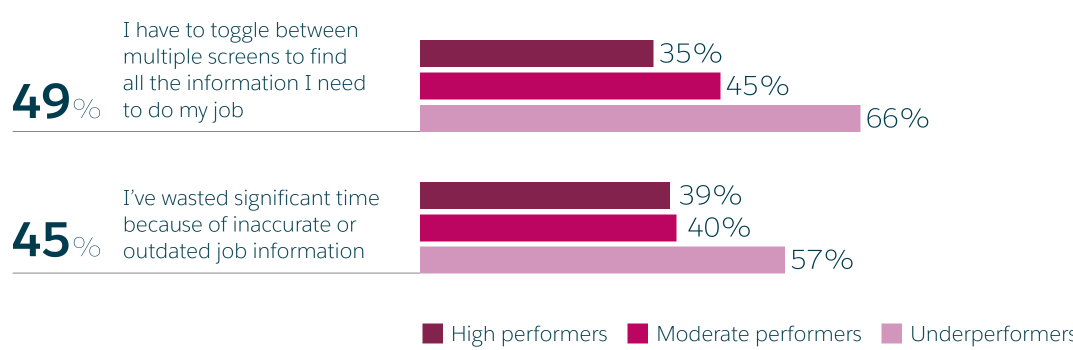
Mobile Workers Who Say the Following

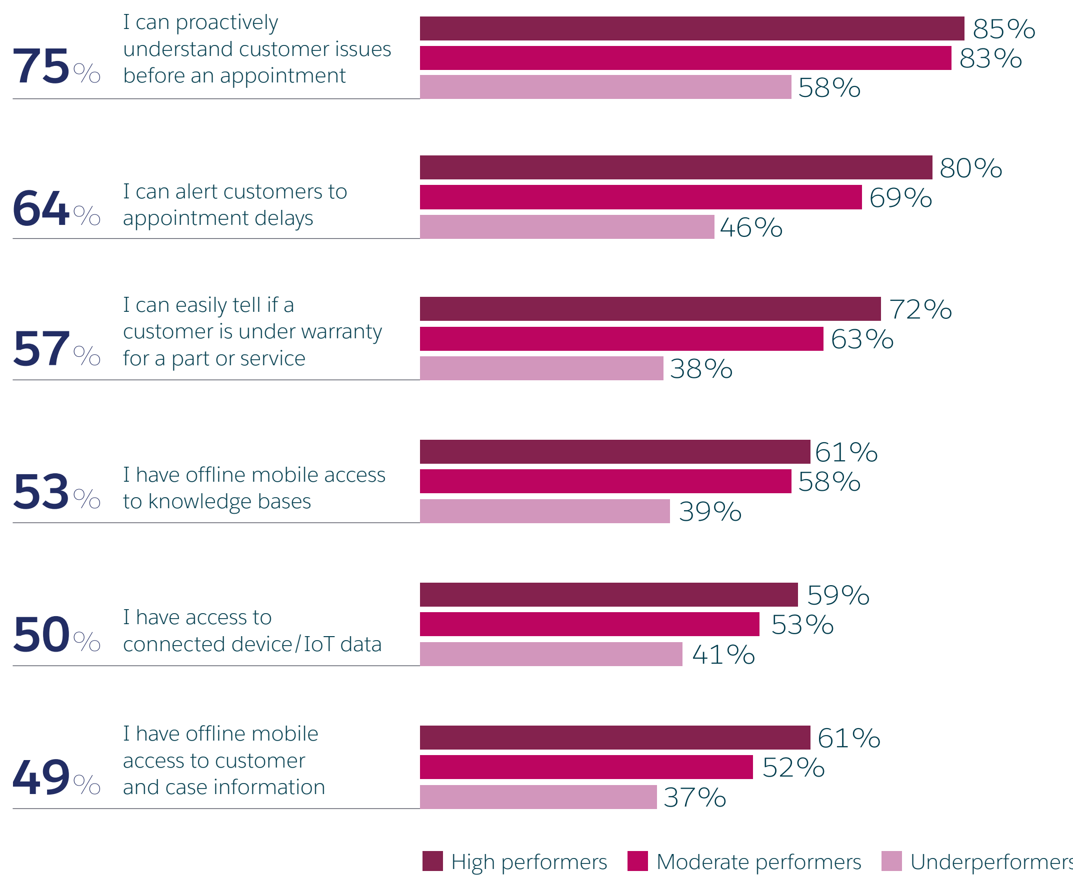


A Capabilities Gap Separates Top Field Service Teams From the Rest

Like an accountant without a calculator, a mobile worker without the right tools and information will not only frustrate themselves, but also their customers. As companies turn to mobile service for brand differentiation and new revenue streams, ensuring their mobile workforce has the same capabilities as their office-based colleagues is critical for the customer experience and employee experience, alike.

Top mobile workers are distancing themselves from the underperforming competition when it comes to the quality of service they can offer. In some cases, this amounts to capabilities that essentially extend the office to a mobile worker's smartphone or tablet, such as offline access to critical information. In others, the impact on the end customer experience is more evident, like being able to understand the issue before stepping onsite or updating customers on delays.

Mobile Workers Who Say the Following



Survey Demographics

INDUSTRY

Technology	11%
Healthcare and life sciences	10%
Retail	10%
Manufacturing	9%
Financial services	9%
Engineering, architecture, construction, real estate	7%
Travel, transportation, and hospitality	7%
Government	6%
Consumer goods	6%
Education	5%
Media and communications	4%
Other	16%

COMPANY SIZE

Small (21–100 employees)	22%
Medium (101–3,500 employees)	51%
Enterprise (3,501+ employees)	26%

BUSINESS MODEL

Business-to-business (B2B)	16%
Business-to-consumer (B2C)	37%
Business-to-business-to-consumer (B2B2C)	47%

COUNTRY

United States	15%
Brazil	10%
India	10%
Japan	9%
Mexico	9%
Australia/New Zealand	8%
France	8%
Canada	7%
United Kingdom/Ireland	7%
Germany	6%
Nordics (Denmark, Finland, Norway, Sweden)	5%
Singapore	4%

REGION

North America	23%
Europe	26%
Asia Pacific	32%
Latin America	19%

ROLE WITHIN SERVICE

VP, SVP, EVP, or equivalent	10%
Team leader, supervisor, manager, director, or equivalent	67%
Mobile-based service or support worker	23%

SENIORITY

Decision maker with mobile workers	77%
Mobile worker	23%

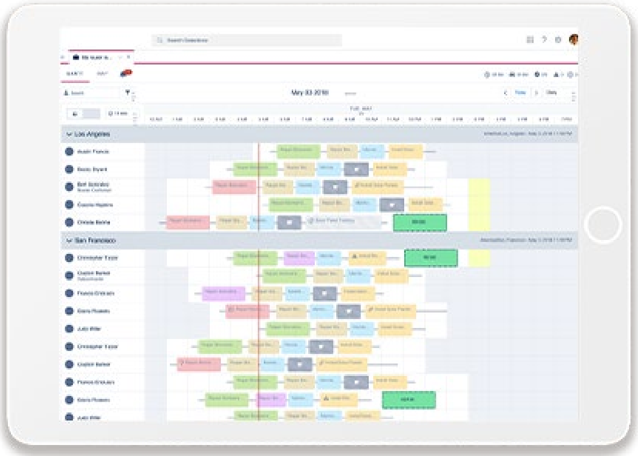
GENERATION

Baby boomers/Traditionalists (born before 1965)	11%
Gen Xers (born 1965–1980)	36%
Millennials/Gen Zers (born 1981–1999)	54%

Related Resources

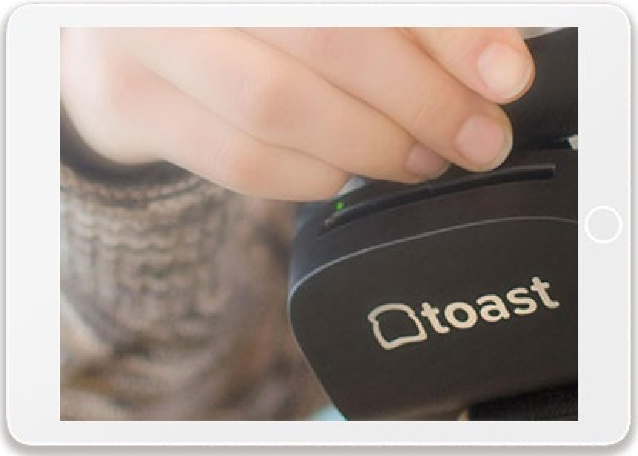
Hear analyst predictions for field service.

GET THE ANALYSIS



Take a test drive. Watch field service in action.

WATCH THE DEMO



See how Toast cooks up seamless Sales and Service.

READ THE STORY

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