

5 Future-Proof Capabilities Your FSM Platform Should Have





Selecting the right field service management (FSM) solution can be a complex and challenging process for field service organizations (FSOs). This is particularly true today, as service providers must meet an increasing array of customer demands. Service organizations need access to a broad feature set to address the automation of the entire service lifecycle, while also integrating the FSM system with other components of their business platform (ERP, CRM).

With customer requirements and new technologies evolving more rapidly than ever before, FSM solutions also need to be adaptable. You can't deploy a solution that only meets your current needs – the system has to be future-proofed so you have the flexibility to create new workflows, integrate with new applications, and adopt emerging technologies like augmented reality, the Internet of Things (IoT), and new mobility options like wearable computers.

That's why shopping for an FSM platform requires a new approach. In addition to selecting a solution that includes the traditional modules FSOs need to automate their operations (work order management, dispatch, etc.), these systems must include future-proof capabilities like ease of integration, the ability to create no-code custom workflows, and features that can improve the customer experience.

Why FSM?



FSM software can optimize and automate the entire service lifecycle in ways that not only improve efficiency and reduce cost for the FSO, but also provide increased visibility and higher levels of service for customers.

Customer expectations have been raised significantly by consumer-focused services like Amazon Prime and Uber. Clients not only want prompt and effective service and maintenance from their FSOs, but also expect next-level capabilities that provide convenience and business intelligence and generate hard data on the value they are receiving.

Increasingly, FSOs are turning to field service solutions that provide additional flexibility to meet this demand. Solutions are emerging that

provide faster, lower-cost deployment models (cloud-based or software-as-a-service [SaaS] solutions) and that can be quickly customized or updated in-house without additional development costs.

FSOs are still looking for solutions that will help them automate work order creation, scheduling/dispatch, location tracking, and time/labor tracking, as well as solutions that can provide mobile access to customer and equipment history, enable field technicians to generate new work orders and quotes on the fly, and help better manage field inventory. However, they are also searching for solutions that can grow along with their business requirements.

These future-proof solutions should include these five critical capabilities.

Intelligent Integration

The cost of enterprise application integration is rapidly increasing. According to Orbis Research, these costs will increase from \$10.3 billion in 2017 to \$17.4 billion in 2023. The costs are driven by the complexity of these integrations and the need for labor-intensive custom coding.

Service customers need – and are demanding – greater visibility into the service chain, and integrating FSM with other business systems is the only way to provide it. However, that visibility can't be achieved through ad hoc processes, manual interventions, and increased labor. That approach is neither scalable nor sustainable.

Field service automation software should provide a platform for integrating functions and streamlining data communications across multiple systems that affect service delivery – CRM, ERP, inventory management, fleet/dispatch, and the field service system itself.

Intelligent integration should focus on consolidating systems and sharing data, reducing human error, automating processes, and maximizing employee effectiveness and customer satisfaction. The more integrated your systems, the faster you can deploy new customer accounts. That level of integration is the key to any successful operational development model.

The FSM solution should enable easy integration with common business systems. The Astea Alliance Enterprise™ platform has achieved this level of low-code integration, creating a pipeline between applications that allows those systems to share data seamlessly and automatically across software platforms. The platform includes out-of-the-box connectors to traditional third-party applications and a full set of web services to enable automated workflows.

The Astea Process Flow engine allows customers to leverage those integrations to create automated workflows – and to do so without enlisting a developer or requiring advanced technical expertise. FSOs can create automated workflows so customer data entered into the FSM can be rapidly shared with other software systems. For example, if customer data



changes in the field service application, those changes can be automatically communicated to the CRM solution so everyone working on those accounts (sales, marketing, etc.) has the most current information.

This eliminates “swivel chair syndrome,” where employees have to toggle between different systems and re-enter the same information multiple times. With a single interface, data can be entered and validated once and any corrections propagated automatically across applications.

All of the information your employees need to respond to customers accurately and efficiently can be at their fingertips. Employees are empowered to make better business decisions faster, without having to check multiple systems.

New Deployment Models

The emergence of cloud-based software or SaaS deployment models can also future-proof an investment in FSM technology. SaaS solutions increase flexibility and can greatly simplify both the initial deployment and future software upgrades, whether those changes originate with the vendor or from within the FSO.

Because service organizations are highly mobile and have a widely dispersed employee population, the field service sector has been particularly open to cloud/SaaS deployments. Applications can be rapidly implemented without having to physically handle all of the mobile devices and without the expense of installing dedicated servers or purchasing perpetual licenses.

This makes it easier for the application to grow with the business. FSOs can quickly scale the deployment up or down as their business needs change. As the software is updated, those changes can be implemented across the entire organization at once with the touch of a button and with minimal disruption. FSOs can take advantage of new features more quickly and at a lower cost than an on-premises upgrade.



Creating Custom Workflows

The FSM platform should provide true, future-proof flexibility – and that means the ability to adapt the mobile and back office software interface to meet users' changing needs, as well as the ability to create custom workflows.

The Astea Alliance platform enables FSOs to update and change the software without creating new code. Non-technical staff can make field-level changes such as adding new fields, generating new types of reports, and setting value types. In addition, they can generate new workflows that can be tailored to specific roles or even specific customer locations.

Because these customizations can be made without impacting the underlying solution code, software updates are also much easier to manage. In the past, many companies were hesitant to move up to newer versions of their software because of the complexity and cost of supporting code-based customizations. It could take months for developers to sort out the conflicts between a customized installation of the software and what was required to support those customizations in a new version. In the meantime, FSOs would deprive themselves of new features and functionality.

A low-/no-code approach makes these conflicts easier to identify and resolve. In the case of Astea Alliance, a resolution feature lists the customizations that will need to be addressed to complete an upgrade and potential fixes for those issues.

This gives users more visibility into the process and makes the entire upgrade process faster and less disruptive.

A Flexible Approach to Mobility

The FSM platform should have a robust mobile application suite that extends beyond the field technician. Managers, warehouse workers, third-party service partners, vendors, contingent workers, and other stakeholders also want the ability to do their jobs wherever they are.

Using mobile tools, managers can approve time-off requests, modify technician dispatch assignments, address customer inquiries, and complete other tasks. Some FSOs even leverage their field automation solutions to create self-service mobile apps for customers, which can be used to schedule service appointments, track service requests, view invoices and approve sales quotes, and provide feedback once service is complete. Astea's customer mobile app even provides an Uber-like view of the technician's vehicle so customers know exactly when they will arrive.

Again, the platform should enable customization of these apps and interfaces so FSOs can better streamline their workflows. The mobile interface can even be customized to the point that the interface or privileges can be altered based on roles or technician experience.

FSOs can also use tools to create checklists in their mobile applications to direct technician workflows and behavior. These workflows can be altered based on the item being serviced, or even based on specific customer preferences or requirements.



Seamless Access to Emerging Technologies

Field service is shifting from a reactive, break-fix model to a more proactive approach in which customers contract with the FSO to provide guaranteed uptime and usage-based maintenance. That requires the use of new technologies such as connected sensors and other IoT solutions that give service professionals a real-time view of equipment performance as well as artificial intelligence (AI) and data analytics to help create predictive failure models.

Some of these technologies may be several years from widespread deployment, but a future-proof FSM platform should be ready to support them. Find a software provider that is working with other technology partners to enable the use of new and emerging technologies. While your business may not be ready to implement these technologies, having built-in integrations for IoT devices, wearable devices, augmented reality, and AI will position you to rapidly take advantage of these systems down the road.

Conclusion

An FSM platform should meet an FSO's current automation and optimization needs and position them for continued competitive differentiation as their business and technology requirements change. It is important to identify an FSM system that offers the functional modules you can use today, but one that is also future-proofed and flexible enough to change and evolve over time.

However, those changes can't require additional investments in overhauling and recoding the platform. Service organizations need the flexibility to alter workflows, modify interfaces, and create new applications within the platform on the fly and with little technical assistance.

This is the emerging frontier of field service software. Instead of a limited set of packaged functionality that has to be customized by expensive developers, FSOs can access a platform that enables them to build new functionality rapidly and at a low cost. This capability will help FSOs tap into features they never envisioned during the initial search for a solution. As new requirements emerge, the system can be easily modified to meet them – positioning the FSO to remain profitable and competitive for years to come.



About Astea International

Astea International is a global leader in field service and mobile workforce management, including all the cornerstones of full-service lifecycle management: customer management, service management, asset management, forward and reverse logistics management, and mobile workforce management and optimization. Astea's technology helps the world's best service-driven companies generate higher profits while properly balancing customer satisfaction and service levels through proactive communication that creates a seamless, consistent, and highly personalized experience at every customer relationship touch point. Astea's solutions unify processes, people, parts, and information to focus the entire organization on the creation of sustainable value in highly competitive, global markets.

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