

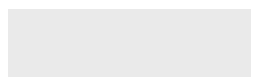


The Key Benefits of Next Generation Field Service Solutions



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Introduction

Field service is an extremely important aspect of business operations in certain industries and market sectors that rely on out-of-house personnel, either employees or contractors, to perform services onsite at customer facilities. These services can include maintenance and repair, equipment set up, site inspections, deliveries and builds, even home nursing visits and related onsite activities.

If your organization provides services in the field, the quality and predictability of the experience is a major determinant of customer satisfaction. The power of data, internet connectivity, and mobile devices has emerged as a key strategy to provide superior field service.

Today, there are a wide variety of robust, flexible, and cloud-based field service software solutions available. These solutions offer businesses comprehensive suites that manage and report on field service staff. The leading suites include a combination of customizable mobile apps for use in the field and cloud-based software to manage field service operations.

If your business relies on service representatives in the field, it is extremely important to understand the benefits of the latest field service solutions. This whitepaper has been developed to review the features of leading software platforms on the market. It also explores key opportunities to maximize these solutions to improve the service standards delivered by your business.



1. Mobile Apps

Modern field service solutions are built around state-of-the-art mobile apps that leverage important features in phones and tablet devices. These apps allow managers and team leaders to monitor and engage their field staff from anywhere using GPS technology embedded on phones and other mobile devices. At the same time, these mobile apps are also designed to improve the experience for technicians in the field, walking them through a visit step by step, allowing them to take photos and videos, even engaging a remote resource for help. The following are a few areas where a mobile app can help provide superior service.



1. Turn-by-turn directions and intelligent scheduling: The app knows the technician's location, guides them to the next site, and also takes travel time into account during planning

2. Step-by-step directions on key tasks: Field Service activities can be categorized by type, with specific instructions associated with each visit, providing technicians a guide to perform the task and management with detailed information about the tasks performed

3. Access to real-time help, guides, and other support tools: Technicians can access user guides, FAQs, and other materials directly through the app and even call another agent for real time support; the video camera on the mobile device enables the remote agent to see what the technician sees in real time, resulting in rapid resolution of the issue

4. Photo and video notes: Technicians can capture photos and videos of their visit to document issues and the current status of assets; these photos and videos can then be accessed by headquarters or a technician on a later visit, reducing the error rate and improving your chances of delivering successful service

5. Visibility to headquarters: The mobile apps leverages GPS to show where the technicians are in the field in real time, enabling your organization to maximize productivity and increase efficiency



2. Management and Scheduling

Modern Field Service solutions also include powerful scheduling capabilities and opportunities for automated or proactive maintenance. Solutions such as Salesforce Service Cloud and Microsoft Dynamics 365 for Field Service allow you to effectively manage your resources remotely using a calendar display.

The calendar display allows you to assign technicians in a visual manner and the software even takes into account the expected time onsite and travel time between sites. ***There are also tools to recommend the best agent for a job, identify free agents, or manage agents out because of illness or scheduled vacation.***

For instance, if one of your field staff is unwell or unavailable, you will be alerted and prompted to

assign the task to someone else. Similarly, you have the ability to create long-term schedules to ensure that everyone knows their job in advance. There are even tools to track supplies like spare parts and make sure that they are being sent to your field staff in time.

There are also sophisticated features that give you the ability to react to unforeseen challenges and resolve complex situations in an instant. Equipment in the field can be equipped with monitoring devices that report on key metrics and automatically schedule service based on your custom criteria. This enables you to provide proactive maintenance, fixing issues before they are even reported or detected by humans.

3. Real-Time Tracking

The use of mobile apps and GPS has enabled Field Service solutions to provide the next generation of real time tracking.

According to estimates, nearly one out of four businesses are now deploying next-generation Field Service solutions with real time tracking

There are multiple benefits of real-time tracking:

1. | Your business can create accurate timelines with respect to service delivery. This could help you in your scheduling process.
2. | Real-time tracking allows you to identify the gaps in service delivery times. You can track instances of your service staff spending extended time at job sites.
3. | You can also set timelines for each service request, and track whether these timelines are being adhered to by your staff. Once you are aware of any gaps in your timelines, you can address them to improve customer satisfaction.
4. | Real-time tracking also makes sure that you are able to get regular updates about the status of a task. This gives you the power to intervene if and when required.





4. Embedded Analytics

Data has become a central aspect of any business's operations. To succeed, your business must be able to leverage data trends to improve the service delivered to your customers. Embedded data analytics is starting to play a vital role in next-generation Field Service platforms, and the technology is expected to play an even more important role due to the increasing usage of the Internet of Things and Augmented Reality.

Right now, embedded analytics solutions from providers like Salesforce and Microsoft allow you to assess vast quantities of data and formulate actionable insights. These advanced analytics capabilities allow you to create customized charts and graphs that help you understand and improve each and every aspect of your service delivery process.

There are multiple benefits of embedded analytics in field service solutions.

You can use analytics to make key decisions related to your service staff. You can optimize their performance and make sure your high-value customers are retained.

Your field staff could also benefit from embedded analytics. Solutions such as artificial intelligence can be deployed to make service recommendations to deliver a better quality of service. These recommendations can also be used to make sure that your customers are delighted.

These analytics can be used to minimize instances of repeat visits by analyzing historical service delays and even recommending preventive measures.

5. Cloud Integration

Cloud technology has become a key driver of a majority of Field Service solutions. This is because cloud technology enables remote access to vital information from anywhere. In the near future, the role played by cloud technologies is likely to become even more important as organizations become more efficient and centralize services.

Today, cloud technology not only connects headquarters to the field, but also enables field service staff to access product information, service procedures, as well as troubleshooting guides. The power of the cloud can be leveraged to access these data sets from any smartphone or other mobile device. The technology also pushes out proactive notifications, alerting your technicians to changes in their schedule, upcoming appointments, and more.

The cloud offers multiple benefits for Field Service solutions:

- ☁ Allow your field staff to access data from anywhere at any time
- ☁ Global security, making sure that your data is protected against unsolicited third-party access
- ☁ Prepare for the task in advance from any device
- ☁ No complex infrastructure to manage or deploy





6. Customization Possibilities

Of course, every business is unique and Field Service solutions ensure you have the ability to customize your field service activities. These solutions allow you to create custom service plans, ensure that your field staff has access to checklists and forms, and also help them in meeting any regulatory requirements. Such a high degree of customization enables you to deliver services of the highest standards, every time your staff is in the field. This customization also has the added benefit of allowing

your business to differentiate itself from your competitors.

This can be achieved by using solutions such as Salesforce Field Service and Microsoft Dynamics 365 for Field Service. These solutions allow you to customize service procedures and make sure that the needs of every client are met. They can also analyze historical data to create custom plans that help your field staff troubleshoot complex cases.

The goal is to deliver holistic services to your customers. **There are three major components of successful service delivery: timeliness, expertise, and resources.** Customization enables you to synchronize these three aspects seamlessly.

1.

Maintain a greater degree of control over your data while ensuring that information is available on-demand.

2.

Create customized teams of experts that provide timely advice to your field staff, thereby ensuring a seamless transfer of information.

Conclusion

This whitepaper has discussed the key features and benefits of next-generation Field Service solutions. These solutions are developing at a rapid pace. Service-providers such as Salesforce and Microsoft are now leveraging the latest technologies including cloud solutions, embedded analytics, and real-time tracking to create products that transform your field service delivery.

These holistic products can be used for multiple purposes. Their primary benefits include easing the service scheduling process and ensuring universal access to data. In addition, next-generation solutions are also storing your data in highly secure cloud environments, and ensuring better communication flows between your service staff and management. Looking ahead, these technologies are likely to provide your business with an even greater degree of customization, ensuring that you are able to exceed your service delivery goals.

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