



expandit

# Why do you need Field Service Management Software?

- the basics you need to know

Demystifies everything from  
seamless scheduling to service optimization

# SAVE TIME, SAVE MONEY, AND GROW YOUR BUSINESS WITH MORE EFFECTIVE FIELD SERVICE MANAGEMENT SOFTWARE

If you are looking for better ways to manage your company's field workers but aren't sure where to start - this guide is for you.

It provides insights into the challenges around field service management and the ways digital software can help to tackle them - creating smarter, safer and more efficient businesses.

The aim is to tackle the issues that field service management software solve and the expected benefits from utilizing them, providing examples of Field Service Management challenges to consider, and many others.

Implementing the right field service management software is more important than ever - we share our knowledge on these pages with the hope of putting you on the path to field service success.





A man wearing a red hard hat and a high-visibility vest is shown in profile, looking down at a tablet computer he is holding with both hands. The background is plain white.

# WHAT IS FIELD SERVICE MANAGEMENT ?

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Field service management is the process of coordinating all of the operations conducted by a field service organization, such as planning service, dispatching operatives, tracking job status, invoicing, and billing.

Field Service Management software refers to any kind of software that is used to handle the management of resources. It is a tool used by companies, who want to organize their business and employees and at the same time provide the best customer service.

Typically, the objective is to ensure that the company stays on top of service jobs and that the right employees are dispatched to the right jobs. To do so, it streamlines and automates key processes or tasks involved in managing field workers and services.

It covers all of the tasks, responsibilities and activities that are involved in managing these operations - from job scheduling and dispatching to compliance and back-office administration.

In addition, you need to meet customer expectations, keep track of employee productivity, manage work orders, store service history and make sure your planning system is always up to date. Outdated processes and different systems can lead to a lack of information, lost time and frustrated customers.

Field service software solves this challenge by connecting the right data in the right places and providing features that help you go from reactive service to proactive.



# WHO IS USING IT?

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Field Service Management software is often implemented by companies that handle installations, repairs, maintenance and services of equipment or systems.

These include businesses within a wide variety of different industry sectors. A few examples could include:

- HVAC
- Construction, renewable energy and professional services
- Property and facility maintenance
- Engineering - on-site inspections, maintenance and repair
- Highways - road maintenance and repairs
- Telecommunications - installation and repair of cabling
- Utilities - maintenance and repair of infrastructure

## **...OR IN OTHER WORDS**

...if you go into the field / leave the office, you should be using a field service management software.

# TYPES OF FIELD SERVICE

Field service management software can be split into the services that they are intended to work with. Whether it is corrective, preventative, or proactive, equipment maintenance needs to be handled.



## Installation

Once a customer purchases equipment, they will need it installed within their operating environment by experts. A field worker will ensure that it is correctly installed and fully operational from the start, setting a baseline and the standard for the future operation.

## Maintenance

Maintaining equipment is labor intensive. Since repair time is expensive and the time to respond to an incident can result in excessive downtime, it's best to conduct pre-planned activities in order to maintain the equipment before it breaks. Examples of this include inspection and replacing worn parts before they completely fail.

## 3 typical categories of field services maintenance activities

**Corrective:** If a product breaks, a field service worker is dispatched to the customer location to repair it. Additionally, if a machine is not working as intended, it may require calibration. Both repair and calibration are different types of "corrective" maintenance.

**Preventive:** Preventive maintenance is the scheduled maintenance of equipment and assets in order to keep them running, improve performance and prevent any costly unplanned downtime from unexpected equipment failure.

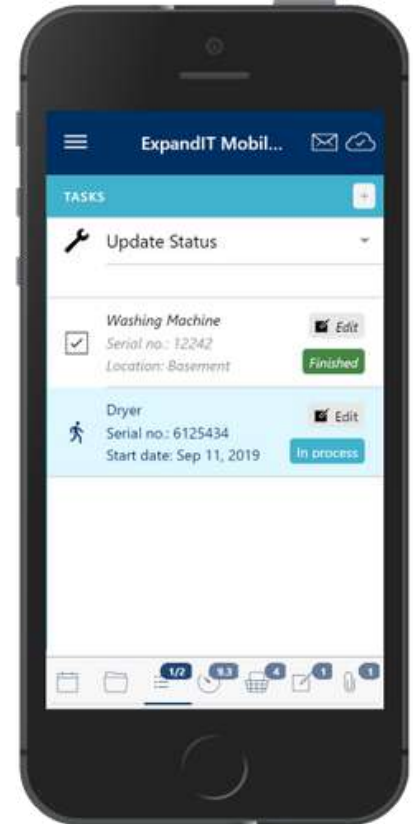
**Proactive:** Proactive maintenance is all kinds of maintenance that is done before any significant breakdowns or failures occur. The aim is to reduce unplanned downtime, equipment failure, and risks associated with operating faulty equipment.

# BENEFITS OF FIELD SERVICE MANAGEMENT SOFTWARE

Businesses that incorporate field service management software in their workflow can increase their productivity in terms of jobs completed each day significantly.

Field service management software can simplify your processes and improve the efficiency of your business in many ways. The main benefits of using a field service management software are described here:

- **Efficient scheduling**
- **Optimized routing**
- **Real-time resource location monitoring**
- **Access to information - online/offline**
- **User accessibility**
- **Faster invoicing**
- **First-time fix rate**
- **Paperless method**
- **Enhanced customer satisfaction**
- **Comprehensive analytics**





# ARE YOU TRYING TO JUGGLE WHERE YOUR TEAM SHOULD BE OR ARE EXPECTED TO BE?

## 1. EFFICIENT SCHEDULING

Field service personnel are often decentralized, with the workers out in the field. This makes manual scheduling inefficient and cumbersome, even erroneous at times. Field Service Management tools are equipped with smart scheduling features to fix this. These identify the position of each worker and the task may be assigned to the nearest worker with the right skill set. This saves companies time and effort and furthermore eliminate overlapping and duplicated tasks. Managers also acquire better visibility of the job progress of their field workers.

## 2. OPTIMIZED ROUTING

For field service workers, long travel times are common. Field service software can significantly lower the time field workers spend on the road. By assigning an optimal route for a field worker to follow, the result is immediate, shorter travel times meaning more jobs can be completed in a day while also cutting down on fuel expenditure as well.

## 3. REAL-TIME RESOURCE LOCATION MONITORING

Field Service Management helps you monitor and identify resources in the field in real time. Track tools, equipment and vehicles and log the use of different items. For field Service Management companies, it's imperative that their field workers are able to access their designated schedules while away from the office.

Field Service Management software allows operations managers to monitor all the field workers' real-time location. It's easier and faster to allocate work orders and manage tasks on a day-to-day basis.





#### **4. ACCESS TO INFORMATION - ONLINE & OFFLINE**

Insufficient information about a task on hand can lead to repeated calls to the office. This is a crucial aspect that Field Service Management software addresses. With the right software you can accurately record and relay job info such as parts required, historical details and time spent. This results in reduced time that field workers spend in sourcing the needed parts and information. It can also increase the first time fix rates for customers since the right materials for the job are brought properly.

#### **5. USER ACCESSIBILITY**

The software should provide accessible formats with alternative means of presenting information for people, who are unable to access it in its original written format. Examples of accessible formats include audio, print, and digital text conforming with accessibility standards. Lighthouse is one of several automated tools for testing accessibility.

#### **6. FASTER, MORE ACCURATE INVOICING**

If your company is still using paper-based quotes and invoicing, payment cycles will likely run longer than you would like. It might take multiple weeks to assess the work performed once all the data has been captured and analyzed manually. As a result, the payment cycle takes considerably longer than anticipated.

With Field Service Management software, however, field workers can quickly send every job detail from the field. This includes used materials and parts, signatures of customers, forms, time spent on the task, and pictures of the job result.

Many companies see their invoicing cycle reduced by 30 days or more with a Field Service Management solution. This translates into better, more consistent cash flow for the company.



## **7. First-time fix rate**

First-time fixes can directly affect how customers feel about the service of the companies. If a problem is not solved during the first visit customers can become frustrated. This is often due to the lack of spare parts and expertise. Aside from that, the business itself stands to suffer financial losses due to additional scheduling, more fuel usage, late penalties, and more.

With smart scheduling capability in Field Service Software, the right specialist with the right competences is put to the job. inventory management ensures that spare parts will be available. Problems can also be communicated a lot more clearly and it guarantees that the field workers are bringing the right equipment for the job.

## **8. Paperless method**

Manual transfer of information is prone to errors and duplicate entries. To prevent such troublesome situations, Field Service Management software features automated capabilities to eliminate errors from masses of paper-based works. The software effectively prevents duplicate entries and data loss. It also provides real-time analytics to help dispatch paperwork efficiently.

## **9. Enhanced customer satisfaction**

Customer satisfaction is the major defining success factor in field services. Field Service Management software can enhance customer satisfaction in many ways. With route optimization, mobile access to information, and sending the most suited resource for the job, field workers render and complete services faster. Furthermore the ability to send SMS, e-mails and mails at key stages of a service order ensures that the field operative and the customer are in sync. This also increases the engagement between field operatives and customers.

## **10. Comprehensive analytics**

One important aspect of growing a business is understanding how it is faring. Knowing the weaknesses and potential issues allows a company to know where to properly direct the efforts.

Businesses can get access to important data such as average repair times, completion of a service call, the number of daily scheduled and completed jobs, return visits, idle times, and more. This information also provides them with opportunities for increasing their efficiency.



# FACTORS TO CONSIDER WHEN BUYING FIELD SERVICE MANAGEMENT SOFTWARE

The most expensive Field Service Management software does not always translate to being the best for any business. In the same way, the cheapest does not always mean a good deal.

Before actually purchasing the software, here are some of the factors to consider:

**1. Cost-efficiency** - Many factors affect the cost-efficiency of a product. These include field workers, business needs, number of users, deployment type, and system customization. You also have to consider other expenses outside the subscription fee. These include implementation cost, training cost and technical support.

**2. Deployment - cloud, on-premise or as a hybrid of the two options?** Companies looking for mobility will look for cloud-hosted solutions. Those that need their system to be more secure and safe from outside access should choose on-premise software. A hybrid system is ideal for businesses that are not sure yet which deployment option is better for them. In order to ascertain which deployment option to choose, you also need to look at the long-term cost of ownership. Add in customizations, data access, and how it integrates with existing software like the ERP system.

**3. Scalability** - Consider adaptability to changing needs when selecting software. Even if you are under a budget constraint, it is still a good idea to look into plans that are pricier than what you can afford for now. This way, you can opt for those plans in the future when your needs expand.

