



FieldAware™



EVOLVING

New Generation Field Management Systems

Field Service Management FMS Systems connect a service organisation directly with its customers by automating the “last mile”.

FIELD SERVICE MANAGEMENT FMS SYSTEMS CONNECT A SERVICE ORGANISATION DIRECTLY WITH ITS CUSTOMERS BY AUTOMATING THE “LAST MILE”. IT AUTOMATES THE WORK OF THE FIELD SERVICE PROFESSIONALS. BUT FSM IS A BLANKET TERM THAT MASKS THE HUGE ADVANCEMENTS THAT HAVE OCCURRED IN THE SPACE. THERE ARE EFFECTIVELY FOUR GENERATIONS OF FSM.

GENERATION 1 - LEGACY SYSTEMS:

Old style, large, heavy duty systems that have evolved through the 1980s and 1990s. Cumbersome and complex, they were really only suited to very large-scale organization with huge needs and even bigger budgets.

GENERATION 2 - WEB-BASED SYSTEMS:

This developed in the 2000s through three general formats.

- (i) Legacy Systems repurposed for the web – retaining much of their complexities and design inefficiencies.
- (ii) New small systems originated on the web, but restricted to limited end-user numbers and limited integration facilities.
- (iii) Systems designed to exploit the web capabilities, with scalability and complex back office integration facilities.

GENERATION 3 - MOBILE BASED SYSTEMS:

This generation took the form of four format streams through the 2010s

- (i) Legacy Systems with independent mobile apps tacked on, generally unsatisfactorily, they were more form than | function in their effectiveness.
- (ii) The smaller web-based systems benefited from the mobile apps because there was really nothing major in the way of APIs and integration standards that caused undue difficulties.
- (iii) The larger web-based systems had great difficulty accommodating highly effective or native apps as their data handling standards were all at the wasteful web-based design standards and not at the more streamlined standards required to handle mobile technology. As long as the numbers of jobs and their intensity didn't get too large, they survived.
- (iv) Mobile first systems were designed by mobile engineers and reversed back into the web technology as required. They allowed for maximized exploitation of mobile technology (e.g.) "always on" allowed service engineer to work in the deep basement with no signal and reconnect after several hours with the mobile retaining all the data created during the job and immediately uploading it on reconnection. No data lost.

GENERATION 4 - NEW GENERATION FSM:

Fully bi-directional integration (Middleware) with the system of record (ERP/CRM/ACC) through the creation of optimized middleware. The New Gen FSM behaves as a fully functional component of any ERP/CRM/ACC system of record. It merges all the power and effectiveness of Mobile First technology, Cloud Computing, Scalability, Optimisation, and access into a seamless connection between the back office and the field service engineer.



WHAT SHOULD BE IN ANY FSM SOLUTION?

At its core, FSM solutions should enable a service organization to:

- consolidate all their work from multiple systems of record such as: ERP, CRM, ACC and EAM
- maintain data in one central environment
- contain a view of all the available resources, parts and materials
- successfully deliver the service required.

The unique transparency of an FSM solution should enable

- Planners
- Schedulers
- Managers
- Field Workers

Access to

- fully complete customer data,
- comprehensive job detail and
- intuitive decision support information through easy to use mobile applications.

This ensures consistency in allocating:

- the **right** resources to work on the **right** job, at the **right** time, at the **right** location with the **right** parts, so service can be properly completed the first time to meet customer commitments and SLAs.

Every FSM claims to do all of these things, and each does so to in their own fashion, but very few deliver the quality of performance required from a robust business.



FSM CREATES GREATER OPERATIONAL EFFICIENCY

Managing a field service operation is a complicated and highly demanding process. It requires manipulating many variables and requirements in allocating each job to Field Workers.

- With increased jobs and Field Workers, the variable options quickly expand exponentially to exceed the ability of any person to create an optimal schedule.
- Other factors come into play, such as
 - constant communications between the field team and customer,
 - processing completed jobs for invoicing and
 - preparing new jobs so they can be ready for dispatch.

A New Gen FSM solution provides multiple ways in which operational efficiency and productivity gains can be achieved either at a group or individual level.

- Group productivity is achieved via centralization decision support and its application of rules and logic.
- Planners are guided to make compliant scheduling decisions while the optimization engine processes 1,000s of jobs in minutes to produce highly optimized schedules.
- Individual productivity is increased via automation of configured job workflows and the provision of all necessary parts, materials, asset knowledge and appropriate Field Worker activities to increase first time fix rates.

Designed and built properly, FSM is a game changer for a service organization.

FSM CAN IDENTIFY YOUR UNPRODUCTIVE WORK

The most valuable and expensive assets in a service organization is the Field Worker and their equipment. But in all operations, there is unproductivity and waste when Field Workers and assets have to move between service delivery locations.

Having to go back to the same location multiple times to resolve the same job is the most wasteful and costly expense to the company.

It results in squandered resource time and materials that could have been used more productively.

These avoidable events lead to

- increased costs as the team scrambles to other commitments
- potential penalties for missed response times
- negative impacts on operating margins

Optimization is the key to any successful FSM





CREDIBLE FSM WORKFLOWS ACROSS INDUSTRIES

A credible FSM solution is capable of excelling at both cross industry and industry specific requirements due to its highly configurable data structure and workflow process support. Below are 5 examples of diverse requirements FSM solutions must be capable of supporting:

01. ONSITE POWER GENERATION AND FACILITIES MANAGEMENT ORGANIZATIONS often require teams of Field Workers or crews to work in tandem to complete jobs. FSM enables crews to be allocated work and materials and for crew leads to manage their jobs by allocating tasks across the team who update the work via their own mobile apps.

02. FOR CAPITAL EQUIPMENT COMPANIES, customers increasingly use smart sensors, and predictive analytics with an IoT solution to monitor and react to changes in system performance. The jobs created are automatically processed within an FSM solution to support triage, site inspection, work effort and customer communication. Organizations can move from preventive maintenance to pre-emptive maintenance and from break fix to pre-emptive fix.

03. B2B/C COMPANIES (HVAC, MECHANICAL, ELECTRICAL AND PLUMBING) ensure Field optimized appointment management. The customer can track the Field Worker to their door. These techniques reduce customer no shows, repeat visits and customer complaints.

04. CONSTRUCTION SERVICES organizations have to deliver project-based work where jobs have to be completed in the correct sequence such as a site inspection, preparing the site, performing different services and finish inspection. Work effort can be performed by different Field Workers. A modern FSM solution schedules and optimizes the sequence of jobs and Field Worker allocation respecting the job dependencies and time by which they need to be performed.

05. COMMERCIAL EQUIPMENT MANUFACTURERS and service companies leverage FSM for installation and repair orders by ensuring deployment of properly skilled Field Workers to the right location with permits and materials. This increases first time fix rates and the optimized schedule reduces wasteful travel between customer appointments.

A modern, credible FSM solution is unique in its ability to enable service organizations in any industry sector to operate successfully as a profit centre while maximizing their commitments to deliver on customer promises.

WHAT IS THE BASIS OF NEW GEN FSM SOLUTIONS?

A New Generation:

- “Born in the cloud”
- “Mobile first”

FSM technology providers have emerged and offered advanced innovative solutions to the broader market. This was once only available to the largest enterprise organisations. This has been enabled by the continued advances in

- Cloud computing
- Consumerization of technology
- Smart phones and
- Wireless 4G and 5G networks.

Organizations delivering services in the field and not utilizing the New Generation of FSM technology, often find it daunting to handle and coordinate the sheer volume of required variables that make up their service business.

But there's more. True New Gen FSM requires bi-directional data at its core.



NEW GEN FSM SOLUTIONS

A New Gen FSM solution provides a service platform or hub that consolidates jobs and key information from systems of record (ERP/CRM/ACC) and allow the extension of core capabilities by adding “best of breed” applications.

Over time, as technology evolves, simply refresh the point service solutions to benefit from the industries latest innovations, while continuing to benefit from the ongoing innovations released on your core New Gen FSM solution.

New Gen FSM solutions are built. Simply put, this ensures data is available for decision makers to produce effective optimized schedules of work and is accessible to all workers especially Field Workers at the point of service deliver.



NEW GENERATION FSMs MUST BE ABLE TO DEAL WITH CONFIGURABLE WORKFLOWS

While organizations view their service delivery procedures as unique, in reality, they are based on common underlying themes running across multiple industry sectors.

New Gen FSM solutions are designed to be ultra-configurable to support a complete range of end-to-end use case requirements thus enabling service organizations to leverage best practices as they innovate their offerings.



HOW DO FSM SOLUTIONS IMPACT THE ORGANIZATION?

- To complete the digitization of the last mile of service, all data is automatically debriefed in real-time.
- Back office systems of record are automatically updated without human intervention.
- This removes potential errors while dramatically increasing productivity.
- Planners and managers utilize centralized decision support tools to enable delivery of the criteria for work allocation decisions.
- Transparency of current and future service operation work-effort affords flexibility through dynamic scheduler boards and map views.

Planners always know what's happening.

FSM ENABLES YOUR ORGANIZATION TO WORK INTELLIGENTLY.

New Gen FSM solutions enable dramatic minimization of unproductive events and optimized operations.

- **PLANNERS** leverage decision support tools to quickly create and scheduled jobs to the right resources in a compliant way, using complete customer and asset data drawn from multiple backend systems and configurable workflows appropriate for their organization.
- **MOBILE WORKERS** leverage handheld device applications that provide all customer and asset data. They access the right parts, knowledge, remote assistance and workflows to successfully speed up job completion times and increase first time fix rates.
- **OPERATIONAL MANAGEMENT** leverage rich business analytics to tweak operational performance.
- **CUSTOMERS** receive regular communications and reminders on their service visits. They track their service technician to the door thus reducing customer no-shows, avoiding repeat visits.
- **GROUP-LEVEL** optimization automatically creates efficient job schedules enabling more work completed with increased first time fix rates.

INNOVATION THROUGH INTEGRATION

New Gen FSM has bidirectional data at its core and as its key to successful integration.

Modern FSM solutions are easily integrated into all key ERP/CRM/ACC systems to allow the bidirectional flow of data from the back office and field where the service is actually being delivered.

Bidirectionality connectivity means no data is ever lost.

The integration through the FSM Service Hub enables extended workflows to be deployed that tie with best of breed applications to provide a powerful arsenal of tools enabling even more innovative services to be provided.

Seamless integration is the underlying power of New Gen FSM

Seamless integration between FSM and back office systems allow realization of data integrity. This enables organizations to extend the life of their historical investments while innovating and digitizing the last mile of their service delivery.





WHAT SHOULD BE IN A NEW GEN FSM SOLUTION?

New Gen FSM solutions are designed to be the Service Hub of the service delivery world and are designed from the ground up.

This ensures they can augment and extend legacy and back office systems into the field.

ENABLING ORGANIZATIONS

- to extend the life cycle of their historical back office investments
- to innovate and digitize the last mile of their service delivery process.

MULTI-TENANT SaaS cloud computing technology providing **dynamic scalability** supporting customers from 100s to multi-1,000s of Field Workers.

EXTENSIBLE DATA MODEL allows customers to easily configure unlimited customized data objects to match their FSM with their unique business needs.

Complex, tailored **Middleware** position the New Gen FSM effectively within the back-office system.

Native mobile apps for Android and iOS devices, empower service delivery by providing access to

- complete customer data,
- job execution workflows,
- dynamic data collection
- ability to capture vital operational data
- including all working times, materials, photos and signatures.

TODAY, NO BUSINESS SYSTEM CAN BE AN ISLAND.

About FieldAware

FieldAware 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. This combination enables field service organizations to enable their field teams and deliver customer service excellence. Our software was architected as a mobile platform, with no incumbent legacy technologies.

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, 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.

Contact Us

To learn more about our solutions or to schedule a demo:

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