

Field Service Maturity: Is the Time Right for Your Evolution?



Introduction

Most companies working in field service today use some form of technology in place of the manual, often paper-based, processes of the past, whether it's basic smartphones or the most complex of the emerging field service management solutions out there.

The maturity of a company's field service operations is dictated by many factors: company size, type of industry and clients served, complexity of workflow, value of the assets and equipment they supply and service, and their leadership.

What's common to all field service organizations, though is that their organizational maturity—and their ability to serve as a business differentiator—corresponds directly to the effectiveness of their technology, regardless of what that technology is. The more effective it is, the better the organization can serve the larger business.

In the simplest terms, the operational maturity of a field service organization can be broken down into stages.

At the most basic, the field service team or department is a service delivery arm that purely reacts to the wider business needs. Such a team probably operates mostly in a silo and is highly function-based. At the most advanced stage of maturity, the field service organization is wholly connected across the company, applying analysis to continually improve performance, and adding value to the business through product and service innovation.

This doesn't necessarily mean that an organization should immediately dive into new technologies to advance its field service operational maturity. First, it's critical to understand the business improvement needed, what needs to change to achieve it, and the urgency involved. The right technology and provider can adapt and evolve along with a field service organization's operational maturity.

This guide provides field service leaders the tools to create such a map by illustrating how a focus on technology maturity can form the foundation of operational maturity.



Is Now the Right Time?

Working closely with hundreds of field service leaders in diverse industries, four key reasons drive the decision to change or evolve field service solutions.



Growth

A growing field service organization needs solutions to support that growth. Expansion of a field service organization's portfolio can seriously overtax existing systems and be even more challenging if the limits of that technology have already been reached.



Flexibility

A developing field service organization needs flexibility to adapt to customer demands, technological change, and business needs. A field service management solution promotes this flexibility. New customers may have different needs, and current customers' own growth may change their requirements. Solutions that accommodate these potential changes are future proof and can incorporate upgrades and adaptations quickly and effectively.



Efficiency

Not having the right technology in place can be a cost driver. A limited solution might promote reliance on manual processes, or prevent effective time and resource management, limiting productivity and potentially compromising service delivery. Or, an organization may outgrow its original solution to the point that it's no longer fit for purpose. Maybe it was built in-house, or was created from other existing business systems. In these situations, the systems can be costly to maintain, outweighing the value they deliver.



Business Insight

While some field service solutions provide a basic understanding of the "what" and "where," which gives some visibility into operations, it's no longer enough. Developing field service organizations today look to analytics capabilities that allow greater value to be unlocked, by enabling management to take action based on real-time information.

This level of business insights elevates the field service operation, transforming it to a value-driving organization within the wider company by delivering real results—increased productivity, customer satisfaction, and revenue—and taking service to the next level of helping drive innovation to create competitive advantage.

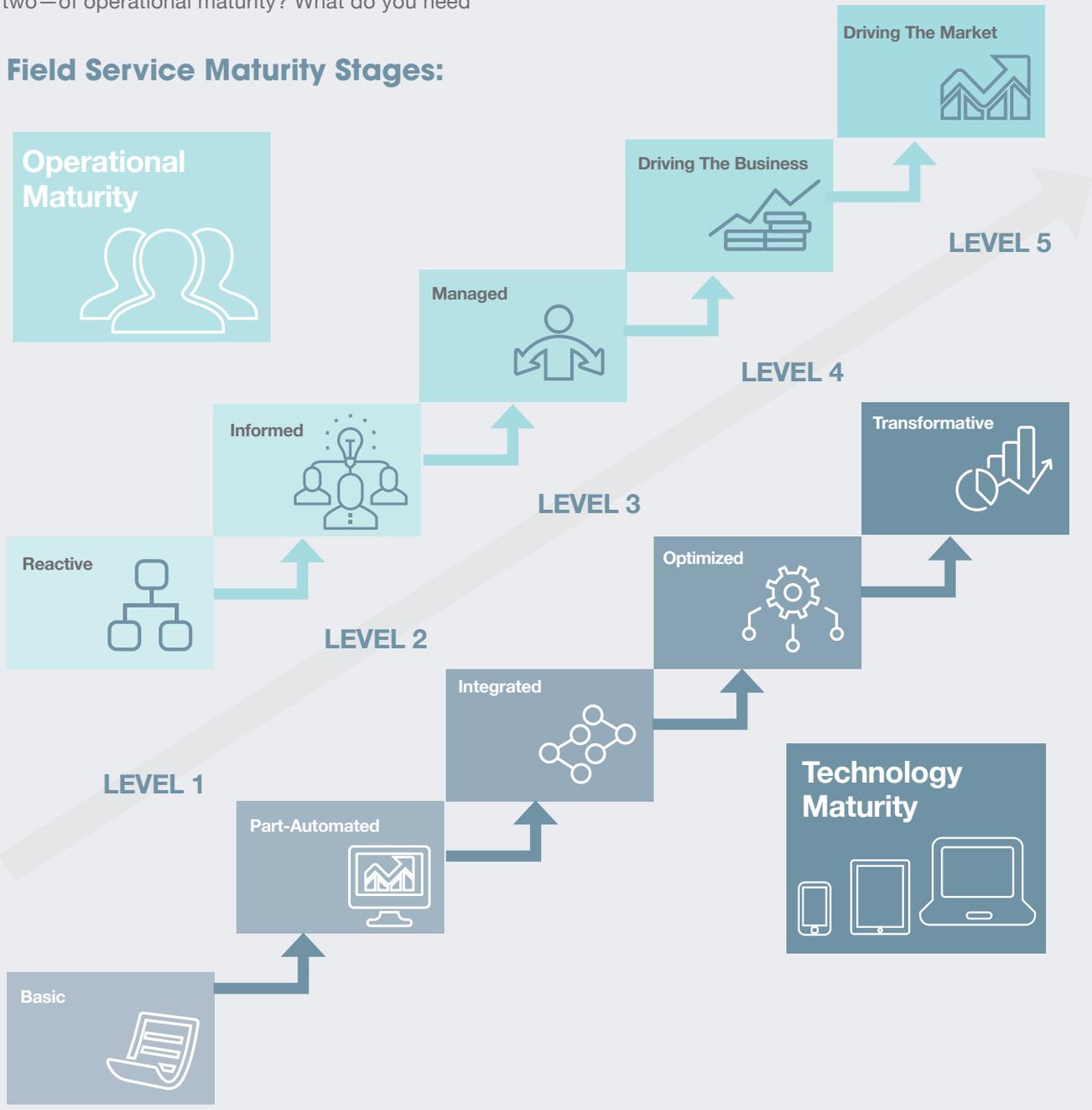
The Stages of Field Service Maturity

When looking to develop the technology maturity of your field service organization and how these relate to operational maturity, start by asking tough questions. What is your current level of field service maturity? How well positioned is your current technology to support you to the next level—or two—of operational maturity? What do you need

to do to prepare for the next step, both within your organization and with your technology?

The following guide details the five stages of technological maturity and the operational benefits to be realized from them.

Field Service Maturity Stages:



Field Service Maturity Stages

LEVEL 1

Technology Maturity (Basic):

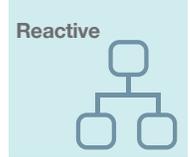


At the most basic technology stage, spreadsheets may be widely used for managing activities such as scheduling, along with other paper-based processes.

Remote access to information is limited, causing field service technicians to make repeat trips to the office. Numerous calls are needed throughout the day, between the office and field teams, especially if emergency work must be scheduled.

Paper-based data capture requires repetitive manual data entry, draining time and resources, and raising the risk of errors.

Operational Maturity (Reactive):



Operational development is restricted by reduced visibility into workflow, and the approach to managing work is generally reactive in nature.

The field team is mostly a siloed operation with strong focus on the department, rather than any wider business requirements. As such, the field service function is mostly a cost center, unable to contribute much additional value to the wider business.



Field Service Maturity Stages continued

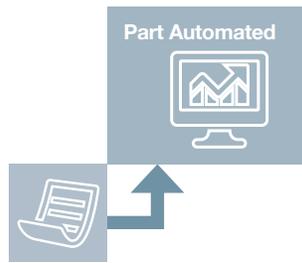
LEVEL 2

Operational Benefits Realized:

- 10x technician time gained with reduced paperwork
- \$40K savings per year on paper alone
- 35% increased efficiency with better scheduling and information access

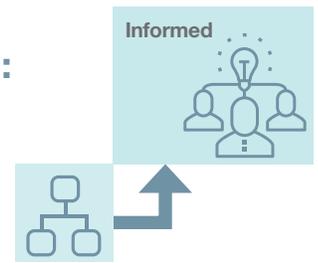
Technology Maturity (Part-Automated):

Dispatchers have the ability to view and assign field service orders, and technicians can access and report on completed orders using applications on devices they can use in the field. The solution allows for some assigning of work based on technicians' location and skills. Similarly, there is some visibility into work being done in the field.



Operational Maturity (Informed):

A limited level of automation starts to yield efficiencies in terms of time and resources. Increased awareness of operations translates into further productivity improvements. With near real-time management possible, work is done in a less reactive, more controlled way. Procedures and processes that can further refine workflows are more easily established.



Business insights and advancing automation allow the operational development of the field service organization to begin. Field service key performance indicators (KPIs) are increasingly defined but may not yet align to wider business strategy, leaving much of the field service operations silo intact.

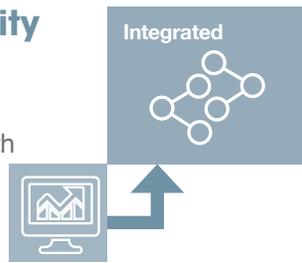
LEVEL 3

Operational Benefits Realized:

- 20% productivity increases from billing alone
- 80 hours a week saved in dispatch communications
- 99% improvement in invoice generation time, from 1 day to 1 minute

Technology Maturity (Integrated):

Field service is integrated with CRM, ERP, or accounting and finance systems.



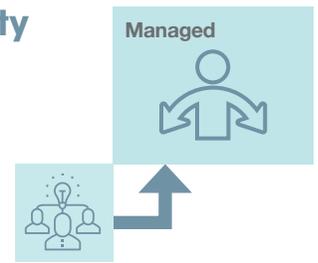
Dispatchers have access to both rules-based and some intelligent scheduling optimization capabilities that enable them to further optimize the use of field resources.

Technicians can receive work orders and report completion from the field and access to other capabilities that enable them to work more effectively such as an enhanced knowledge base.



Operational Maturity (Managed):

Field service is less of a standalone component in the wider business, as integration brings real-time visibility across what were formerly disparate teams. Collaboration and accountability increase and improve.



Procedures can be more easily standardized and processes fully understood in the end-to-end business, further enabling service delivery to move to a more proactive approach.

Operational growth across the wider business can start to be realized, extending the impact of the field service organization without compromising effective delivery of service promises.

Field Service Maturity Stages continued

LEVEL 4

Operational Benefits Realized:

- 15% overall revenue increases
- Increased margins from the ability to drill down into KPI drivers and use insights to improve efficiencies.
- Subjectivity removed from decisions with factual performance data

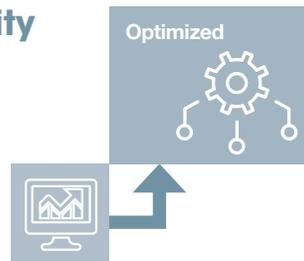
Technology Maturity (Optimized):

At this stage, the dispatchers' work is almost 100 percent automated, only managing by exception as needed.

Advanced scheduling is available and inventory integration ensures access to the right parts and tools.

Technicians have access to a full suite of tools and technologies in the field. Mobile forms ensure enhanced data capture and workflow capabilities.

Business intelligence and analytics platforms provide field service leaders with total visibility and valuable business insights to enable informed decision making from the field service management platform and integrated business solutions.

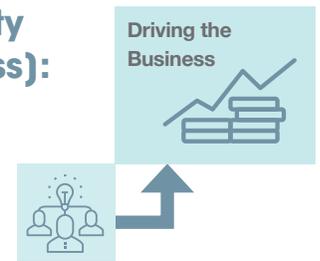


Operational Maturity (Driving the Business):

Field service turns into an opportunity to drive business, as continual operational improvement becomes the norm. Processes become underpinned by true business intelligence and trend analysis. Operations become more quantitatively measured and managed.

More customers have an improved level of service, with individual customers receiving a deeper service delivery experience. This in turn generates opportunities for growth. With better insights and analysis, the field operations team has greater accountability within the wider business, and KPIs map onto strategic business goals.

An optimized field service organization is no longer seen as a cost center, instead unlocking deeper business value and competitive advantage.



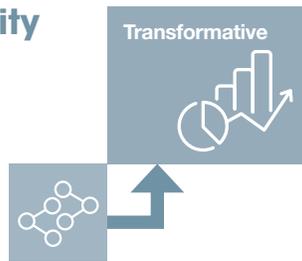
LEVEL 5

Operational Benefits Realized:

- Predictive model of service, continually improving efficiency, cost reduction, and better customer service
- Analytics drive value-adding initiatives into the wider business, with customizing service and product innovation.

Technology Maturity (Transformative):

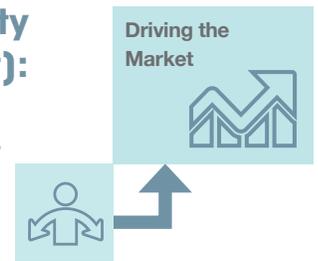
This stage includes the opportunities to transform field service through new and emerging capabilities:



- **Internet of Things (IoT):** Increased visibility through a network of smart, connected devices equipped with sensors to collect and exchange data from the field, triggering service activities.
- **Augmented Reality:** Enhanced communications through live and interactive broadcast. For example, smart glasses further augment communications between the field and centralized service experts through an interactive, real-time interface.
- **Algorithm and artificial intelligence (AI):** Advanced analytics power even more enhanced efficiency, with capabilities such as predictive maintenance and automated processes.

Operational Maturity (Driving the Market):

This transformative stage has the potential to dramatically affect field service operations, enabling the organization to drive not only the business, but the market.



The in-depth insight that technological advances such as IoT and AI can deliver provide a continual improvement to performance and process which can then be applied to drive innovation into products and services. Forward-thinking companies will be able to apply these insights to help micro-target and customize the services they offer to their customers much more precisely, deepening the customer relationship and improving satisfaction levels.

Ultimately this greater understanding of their customers' needs and expectations is what will help companies differentiate themselves from their competition and lead company growth. Some leading organizations are already achieving this level of maturity.

Making Your Next Move: Recommendations

It's well documented that field service is a growth area. Many organizations have already invested, or are looking to invest, in technologies to maximize the operational benefits that emerge with evolving maturity.

Regardless of where your organization is in its field service maturity, certain factors contribute to success:

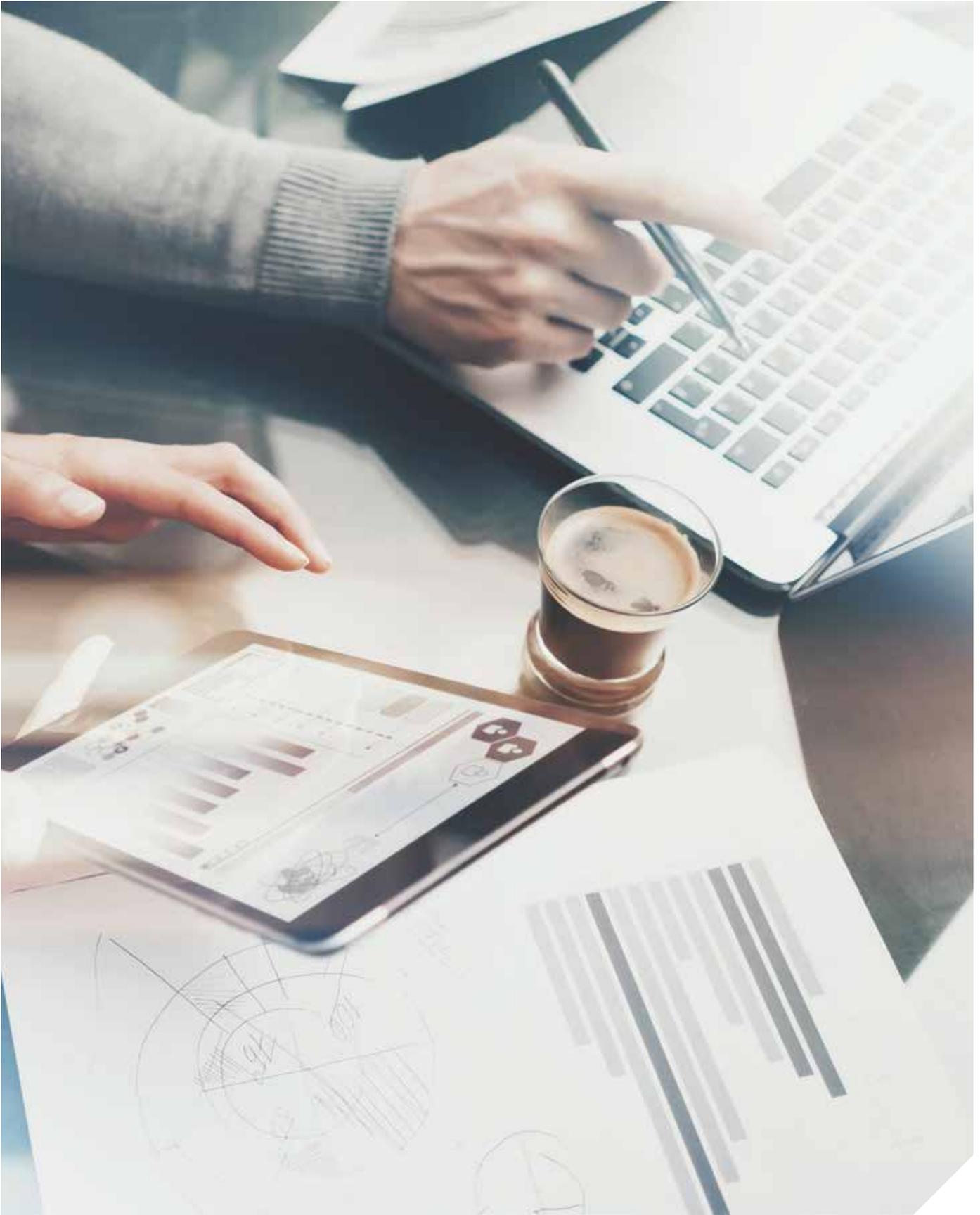
- Advancing your field service maturity requires staying focused on the outcomes you want to achieve.
- Measuring what matters is key to business success in pursuing field service maturity.
- Seeing where improvement is required is what will enable your immediate and longer-term operational objectives.

- Identifying and understanding the current gaps in your technology is critical to evaluating which solutions can support growth.
- Setting a realistic timeframe to work toward, with milestones to track progress, will ensure steady evolution of your field service organization.

Pursuing these elements will provide a broader business case for investment, taking decision making beyond a purely financial analysis to define the ways the field service organization can help be a business and market driver.

For a more in-depth look at how to make the next move see our paper 'Developing Your Field Service Maturity: Concept to Reality'





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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