

Developing Your Field Service Maturity: From Concept to Reality



Introduction

In our white paper *Field Service Maturity: Is the Time Right for your Evolution?* we looked at how most companies working in field service today have some form of technology they use, which takes them beyond relying solely on the manual processes of paper-based systems. This can vary significantly, from the basics of utilizing a smartphone out in the field through to the most complex of field service management solutions and other emerging technologies we see today.

The maturity of a company's field service management, in terms of the technology being used, can be dictated by numerous elements. These could be the company size, the industry and type of clients they serve, the complexity of the workflow, the value of assets and equipment they supply and service, and their leadership.

While these operational aspects dictate and are directly related to the technological needs, it is also true that the operational maturity of an organization can be shaped by how advanced their field service management is.



In the simplest terms, the operational maturity of a field service organization can be seen as having incremental stages. These stages go from the most basic, where the field service team or department is a delivery arm that purely reacts to the wider business needs. The team probably operates pretty much in a silo and is very much function-based. The ultimate stage of maturity is where a field service organization is wholly connected across the company, applies analysis to continually improve performance, and adds value to the business through product and service innovation.



This doesn't mean an organization, wishing to develop its field service operational maturity, must go from zero to a hundred in one move, in terms of the technology it implements. The key is to understand what is the right fit for them; what needs to change, the urgency involved, and the business improvement needed.

To do this, field service leaders need to understand where they are today and to map out where they need to be, more immediately and further into the future. They must ensure that the technology they choose and—critically—the technology provider they work with can evolve and support the business through their field service operational maturity.

Without doubt, the right fit technology improvements add business value. This paper will show which steps you can make to develop your field service maturity, moving from concept to reality in realizing the benefits of the next technology stage to your operational maturity.

The Stages of Field Service Maturity

In the paper *Field Service Maturity: Is the Time Right for your Evolution?* we saw there are a number of stages to consider when looking to develop the technological maturity of your field service organization and how these relate to operational maturity.

So, where are you and your business in the stages of field service maturity? How well positioned is your current technology to

support you to the next level—or two—of operational maturity? What does the right fit technology look like? What do you need to do to prepare for the next step, within your organization and with your technology?

Here we explore what those stages are, some of the operational benefits to be realized and what this means to your company's field service evolution.

The operational maturity of a field service organization can be broken down into **five stages** and these are some of the benefits being realized by FieldAware customers by moving their field service to the next level.

LEVEL 1

- Mostly a cost center
- Little contribution to the wider business

LEVEL 3 > 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

LEVEL 1 > 2

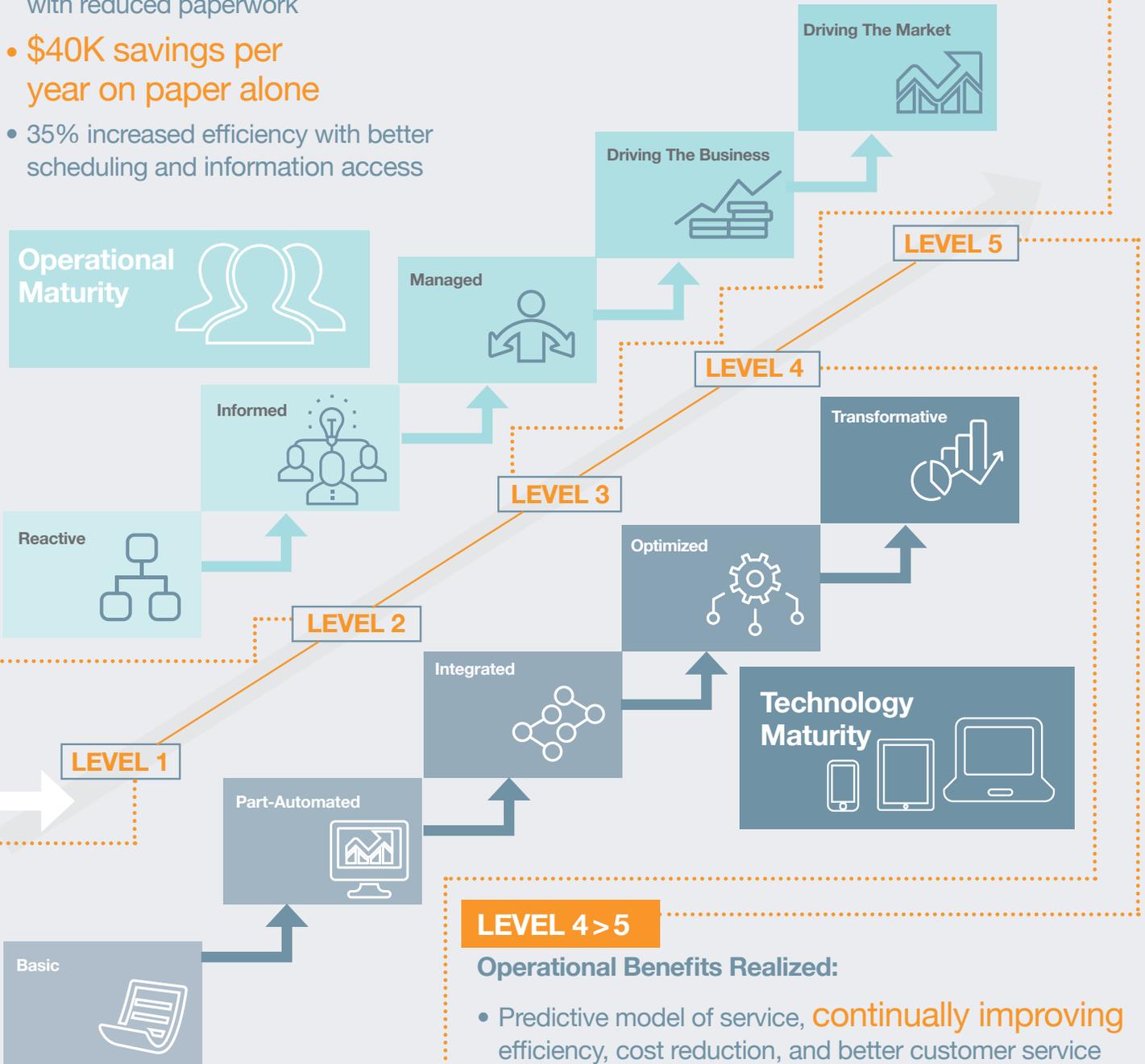
Operational Benefits Realized:

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

LEVEL 2 > 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



LEVEL 4 > 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.

The Next Steps: From Concept to Reality

It is widely acknowledged that field service is a growth area. Many organizations have already invested, or are looking to invest, in the right fit technology to maximize the operational benefits that align with this evolving maturity.

Your organization's current field service maturity will influence your needs and decision making, and no matter that stage, there are some general processes to consider working through to support you in making the next move. These include:

1. Needs Assessment
2. Solution Evaluation
3. Selection Criteria
4. Implementation Best Practice

Taking these steps will provide a broader business case for investment, which takes decision making beyond a purely financial analysis to define the ways you will want to measure results from your next move on your field service maturity journey.



1. Needs Assessment

It is critical to have a clear understanding of your business strategy to determine how best to enable business growth now and in the future. Developing this bigger picture helps keep you focused on the outcomes you want to achieve. With the complex elements involved in field service operations, the details of current pain points and challenges can distort decision making. Staying focused on the ultimate objective by conducting a needs assessment separate from day-to-day challenges will lead to better solutions to today's operational barriers.

Organizations that address this bigger picture and the requirements needed to get there with a needs assessment are much more likely to be successful and see greater benefit from the changes they make. It is often useful to focus on the outcome and work backward from that point. For example, delivering added value to customers is a priority for many organizations, so it is a given that any operational changes and technology developments should support and enable it. Starting with this end point will result in a greater understanding of how the business can deliver this customer value successfully and consistently.

A needs assessment also yields greater knowledge of your current business, its operations, and where the business value of field service can be truly unlocked. This type of insight helps identify and measure the metrics that matter to your business success. These may include tangible metrics such as first-time fix rates, technician utilization, asset uptime and service-level agreement achievement. These



quantifiable business benefits can be easily measured and monitored, and contribute directly to return on investment (ROI).

However, managing this information is often still a challenge for organizations, as field service data can come from so many disparate sources. Analytics capabilities not only provide daily insight for informed and instant decision-making, but also trends and performance, so field service leaders can work more strategically with the metrics they need to monitor over the longer term to drive business growth and unlock greater value.

In addition, qualitative benefits such as customer satisfaction and improved visibility, as well as employee retention, are all commonly applied in justification for technology improvement and investment. These qualitative measures shouldn't be undervalued; while improved field service management brings overarching

1. Needs Assessment *continued*

business benefits, the benefits to individuals and teams are significant. Employee retention, for example, is gaining importance in field service, as the workforce ages and competition for talent increases. The emerging field service worker is more technology-savvy than ever, and a technician's day is much improved if by a schedule that makes good sense as to where they need to be and when throughout the day. Their job is enhanced by having customers kept up to date about their arrival times and expectations about the work to be done. With access to the information they need to do their work on-site, technicians will know the detail of the job they are turning up to, have access to all relevant information and history, and know what parts, tools, and skills are required to complete the job. All of these contribute to an improved customer experience and greater job satisfaction.

Finally, before starting out with any needs assessment for technology investment, having a project sponsor can be key. Buy-in from leadership is critical. The potential to add value to the business beyond field service is something that may not be understood or appreciated by the management of your organization. Metrics are fundamental to keeping management and decision-makers informed. They not only demonstrate the benefits and potential of developing the organization's field service maturity, but also how this aligns with and contributes value to the wider business objectives.



2. Solution Evaluation

A solution evaluation is critical to determining whether your current technology solution or business practices provide you with the best infrastructure to support your business strategy. It's worth making the time to identify and understand the current gaps in your technology, and evaluate which solutions are the right fit to support your current and future growth.

But as stated earlier, this doesn't mean an organization, wishing to develop its field service operational maturity, must go from zero to a hundred overnight in terms of the technology they implement. It is understanding what the right fit is and what needs to change, the urgency involved, and the improvement required to create a true business transformation.

Before taking any great leaps, it's best to ensure your organization is making the most of the basics that are required, and look to master these first. Transformative technologies deliver enormous potential to field service, but it may be that a mobile form capability delivers far greater value (and ROI) into your current operational needs in terms of improving data capture for greater efficiency, supporting safety or compliance issues, and managing parts for improved first-time fix rates.

In any solution evaluation, acknowledge the importance of integrated solutions—both now and in the future—that can create significant



competitive advantage. Understand what the priorities are for integration, both in the field service organization and the wider business. Some will be a natural fit and an obvious place to start, such as access to customer records through a CRM integration, allowing a technician to easily retrieve all information they need when they need it. Integration of field service with accounting systems will deliver significant business improvement as, for example, a work order can be issued, and then upon job completion the customer can be invoiced immediately, achieving a quicker payment cycle through this order to cash automation.

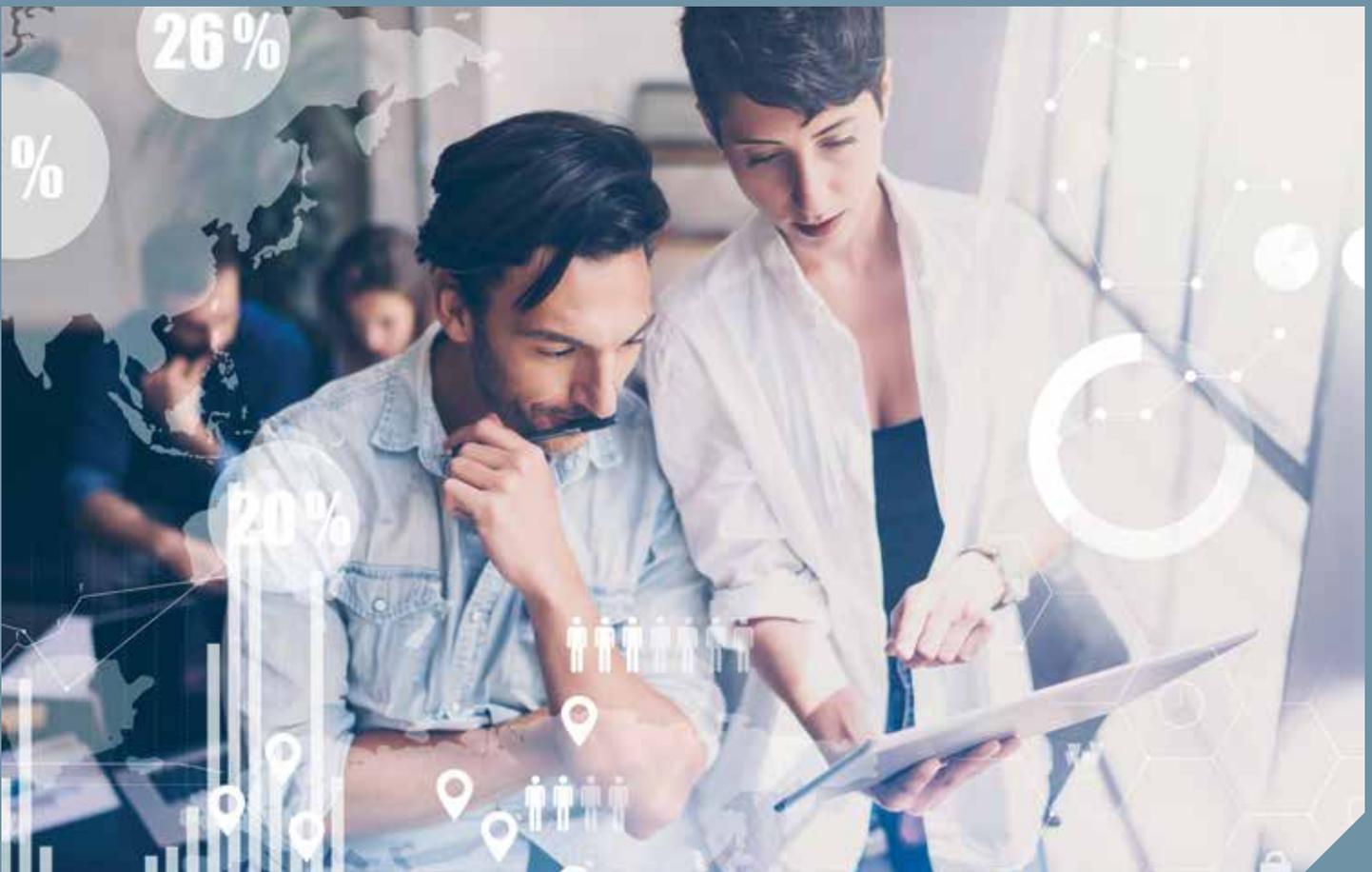
Engaging with users is fundamental to the success of any technology change. To do this effectively, build a complete picture of how the field service management solution is to

2. Solution Evaluation *continued*

be used, by whom, and where, and of what needs to be captured and why. Consider all users' needs, including those in the field, users who are in direct contact in the back office, and those in the wider business. Field service value has the scope to go beyond the field service teams, so consider all systems of record in the wider business, to allow the organization to expand the value it adds.

Know which teams and individuals contribute to the success of any changes to the solution, and take them with you on the journey.

Be realistic with not only what is required, but also with setting a realistic timeframe to work toward, with milestones to track progress. The solution evaluation must recognize where any technology improvement is required to enable your immediate and longer-term operational objectives. But do appreciate that field service technology is—and should be—ever-evolving, and prepare to embrace that to continue extending the impact of field service to the larger business.



3. Selection Criteria

From working with a range of companies in different industries, we've found that whatever type of field service organization you manage, there are some simple principles to follow when selecting a solution, to align with business growth and keep pace with demand. Your RFP doesn't need to be perfect to start the process, but there are some fundamentals to consider. These help to address both what your immediate needs are as a business today and where your evolution will take you.

These principles include making certain that the technology selected supports you in the following ways:

- All software needs to be innovative, agile, and able to move with the next generation. It must be able to expand and adapt as needs grow and maturity changes. Solutions must be straightforward to update with product upgrades and customizations, so that your business doesn't suffer any related delays. Business and disruption move fast today, and as your maturity develops and technology needs evolve, your vendor needs to keep pace with its R&D.

Questions you can ask your service provider:

- Is field service management the core focus of your business?
- How much does your company spend on R&D for field service management annually?
- What is the product roadmap for the next 12-24 months?

- How are new product features offered to existing customers?
- What is your release cycle for updates and bug fixes?
- Will I have input into the product roadmap if I have a good idea? Can you prove this with examples?
- What was your average uptime during past 12 months?
- What sort of feature and load testing has the software been subjected to?
- What functionality does the software include for detecting and reporting data errors?

- A solution must be relevant and scalable to your specific needs, meaning that it must be configurable and flexible to accommodate the many unique business and workflow requirements you have now, and where they may change as your market or needs evolve. Your vendor's professional services, training, and support teams are critical to the ongoing success of your solution and the ability to maximize your ROI.

Questions you can ask your service provider:

- Can I configure the solution or add custom fields to meet my needs?
- Can the system features be configured by "business technologists"?
- How many of your customers needed customizations to meet their requirements and what are the most common customizations?

1. Needs Assessment *continued*

- Will my solution require the creation of custom code or the development of custom scripting? If so, why is it required?
- Which parts of the software require code or scripting skills to configure?
- How does the custom code affect an upgrade? Who is responsible for maintaining and supporting the custom code?
- Who develops your product (e.g. contractors, dedicated engineers, outsourced) and where is your product developed?
- Who is responsible for implementing your solution? How long have they been doing it? Do you rely on system integrators?
- Are there any significant quantifiable limitations to be aware of in terms of supported user counts, data records, or bandwidth usage?
- What changes would we need to make if we doubled our expected usage of the software?
- Can you describe the level of experience you have migrating data from other systems (e.g. competitive products or home-grown system) to yours?
- Any solution and future enhancements to a solution should be easy to use. Complicated systems will take longer for workers to adopt, which can lead to features or steps being bypassed and worked around, to negative effect. How quickly your technicians take to the solution and any changes and developments to it, and their ongoing adoption, will affect the return on your investment. Training and support from your solution provider is key.

Questions you can ask your service provider:

- How many clicks does it take or modules do you need to access <insert critical task here >?
- What type of training is included in your implementation program?
- Who does the training, are there scheduled courses?
- Who is responsible for your support, what kind of infrastructure do you have and where is your support team located?
- What are your support SLAs for all tiers of service?
- What is your renewal rate and is it trending up or down?
- Will I ever have to pay for an upgrade?
- If so, why?



- Ease of integration is key. There should be no need to upgrade the entire end-to-end solution to simply allow better workflow to and from the field. Many companies will have made significant investment into existing systems, which may be highly complex and often bespoke. Extending the life of these systems is important, so layering the simplicity of field service over the complexity of the existing solutions will help to leverage their use.

Questions you can ask your service provider:

- Do you offer a robust two-way integration?
- How frequently is data shared and updated?
- Does your software include an API (application programming interface)?
- How extensive is your API and what kind of interface protocol does your API utilize?
- Can you name some of the programs with which your software has been successfully integrated?
- What are the start-up costs for your software and how much of that is for licensing versus implementation services?
- How many hours do we need to budget internally for software implementation and training? (Necessary to calculate internal soft costs)
- How quickly can we be up and running on your product? Does it work “out of the box”? Will it take a week, a month, a quarter or six months or longer to deploy?
- Can the analytics platform use data from across the organization?

- Do you have dynamic forms and input capabilities to bring in standardized data that can be used by other systems?
- Does the software offer integrated functionality to customize and create reports or are direct database queries required for this?



4. Implementation Best Practice

As with much technology, it is not just having the right solution that matters. Gartner¹ states that by 2021, 50% of organizations with more than 50 field technicians will own more than one field service solution, but will miss 20% of the potential efficiency gains due to incomplete integration or deployment.

Implementation needs to be straightforward and managed to a timescale that means you can be using the solution and all updates, upgrades, and customizations as soon as possible. You should ensure you map the solution to your workflows, so that once it is up and running, it fits seamlessly into your day-to-day business.

Beyond implementation the added value comes through a provider's approach to R&D, engineering, the support they offer with training, change management, and ongoing customer support and success. It is this partnership that is a differentiator for many organizations in how they gain maximum value from their solution.

To make your evolution to the next stage successful, you need to ensure that you see the move through 100%. Field service solution providers with professional services teams to help support you through implementation, as well as the training and ongoing customer success support, will go a long way to ensuring your success in the next stage and beyond in your organization's field service maturity.

1: Gartner, The Six Categories of Field Service Management Application Functionality, Jim Robinson, 6 March 2018



Conclusion:

Field service is an undisputed growth area and identifying the right fit technology to support it depends on your organization's field service maturity.

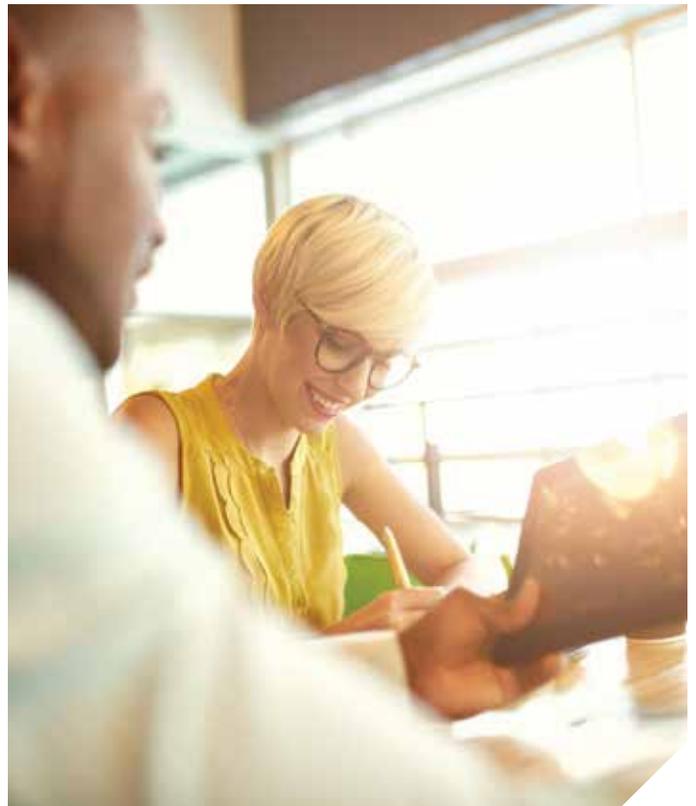
Moving through these four steps of conducting a needs assessment and solution evaluation, examining selection criteria, and implementation best practice will help build a solid business case for any field service management solution investment. This process of focusing on the outcome to be achieved will highlight gaps where improvement is needed in the operational process, help shape the business, and lead to the development of field service maturity in the short and longer-term.

This evaluation will dictate whether capabilities such as the internet of things (IoT) or augmented reality are critical in your field service delivery or if, due to the type of work, these are not essential, but rather integration of your field service with ERP, CRM, accounting or other systems may be a significant game-changer. Either way, analytics capabilities that allow operations to be measured more quantitatively and thus managed better will help field service move from being seen merely as a service delivery function to become a business differentiator that unlocks value with the competitive advantage.

As with any technology, to gain maximum value from field service solutions, the implemented software needs to be fully understood and

utilized. It must align to the operations and longer-term business objectives, and the right metrics need to be in place to track ongoing milestones for results and ROI.

The final question to address is that of timing, which will be on the mind of any decision-maker when looking at investing in solution improvements. Field service has long been seen as simply a business cost, but leaders now recognize that the service operation can be elevated, transforming it into a value-driving organization that delivers broader business results. In light of this potential, the evolution of field service maturity then becomes a business imperative.



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

Contact Us

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

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