

Field Service Management: **The Metrics To Measure**



Introduction

With more data available to field service organizations than ever, the use of analytics has had a significant impact in the sector and interest in business intelligence is only growing. More and more field service leaders want better insight into their business, and they understand that analytics holds the key to this.

At a basic level, it is not simply field service data that matters, but how the data is turned into information that is key. Data should be aggregated from multiple sources to give a unique and unprecedented visibility into the end-to-end operations.

The key to maximizing the value of business intelligence and leveraging the competitive advantage that it delivers, is understanding what to measure in your field service operations. Identified metrics provide a business with the means to measure performance against objectives, and knowing the

metrics to measure will provide total visibility of how field service operations are performing 24/7. Metrics are especially critical if your organization has problem areas, as these can be more easily identified, and by measuring trends and progress, problems can be fixed and improvements made.

Field service managers will know what generally makes for good performance, but the range of metrics to measure is potentially infinite, and how to measure them effectively can be a challenge to many. To help to narrow down an exhaustive list and focus on those crucial to your organization, it is important to consider that field service organizations vary greatly. As such, different metrics are required depending on the company size, the industry and type of clients they serve, the complexity of the work, and the value of assets and equipment they supply and service. The metrics that individuals within an organization will need to measure will vary too, depending on their role and what is important to them.



Where To Focus

The following paper sets out established metrics which we have compiled from working with a wide range of field service organizations, of all sizes across different industries. In field service, metrics generally fall into five broad categories of Productivity, Performance, Profitability, Compliance and

Process. These categories give an overview of your field service operations and the metrics you focus on will be determined by your individual, team and company objectives for how you define success. They also reveal how and where metrics will affect one another.



Productivity

A key factor to many in field service is the first time fix rate which can be used as an individual measure of productivity. It has impact on a number of other metrics too, such as customer satisfaction rate and technician utilization.



Performance

Technician performance at a job can be a critical metric for many field service organizations in terms of looking at 'best' and 'worst' performers to understand the reasons why, gleaning best practice for all and to optimize future resource planning.



Profitability

Service delivery must be measured against profitability. Exceptional customer service might be a company objective but it has to be balanced against the cost.



Compliance

These metrics may be internal to the organization, determined by customer requirements or set by regulatory protocol. However they are set, compliance and service level agreements form a fundamental part of field service operations.



Process

Continual assessment of business processes will ensure an optimized field service operation. Barriers and bottlenecks can be identified and addressed more easily.

Some metrics we have identified will fit into more than one of these categories, but with an explanation to accompany each of the highlighted metrics, this paper will enable you to:

01

Understand the metrics that you could be tracking

02

Focus on the metrics that will benefit your organization the most

03

Enable your organization to use insights garnered from captured metrics

Use this paper to focus on the metrics that are most important for your field service organization.

Field Service Management Metrics



Productivity



Performance



Profitability



Compliance



Process

First Time Fix Rate	Repeat Visits	Incomplete or Missed Jobs by Technician	Contract Leakage	Customer Retention	% of Jobs Not Meeting SLAs by Technician	Routing Efficiency Rate	Field Technician Utilization Rate
Jobs Completed Per Day	Field Technician Punctuality	Contract Uptime	Upselling Rate	% of Renewed Contracts	Customer Satisfaction Rate	Overtime Hours	Employee Retention
Mean Time to Repair	Field Technician Time on Job	Warranty Leakage	Technician Billable Time	Cost to Serve	Average Response Time	% of Ordered Parts Returned	Average Travel Time / Distance / Costs
Mean Time Between Failures	Employee Productivity	Service Contract Attach Rate	Revenue From Services	Health and Safety	Average SLA Compliance Rate	Jobs Scheduled	Customer Acquisition Cost
Ratio of Preventative Maintenance to Reactive Work	Field Technician Skills	Service to Cash Cycle	% Conversion of Warranties to Contracts	Jobs Meeting or Missing SLAs	Mean Time to Complete	Completed vs. Invoiced Jobs	Emergency Parts Order Costs



Productivity

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First Time Fix Rate (FTFR)

Percentage of customer problems resolved on the first visit.

Jobs Completed Per Day

How many jobs were completed during the day and how many resources were required.

Mean Time to Repair/Install/Service

Average time it takes to repair, install or service an item on site.

Mean Time Between Failures

Average time a product or device operates between failures.

Ratio of Preventative Maintenance Work to Reactive Work

How much of service calls are related to preventative maintenance versus failures. This can indicate activities that could be included in service contract offerings.



Performance

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Repeat Visit

Number of times an installed product had to be re-serviced by a technician within a specific time frame.

Field Technician Punctuality

Tracking punctuality helps pin down other issues such as excessive meal and coffee breaks, lingering to chat too long, etc.

Field Technician Time on Job

Track travel time, time on job, non-job time.

Employee Productivity

Who's productive, who's not, and who possibly needs more training.

Field Technician Skills

Measure performance across a wide range of qualities, skills and proficiencies.

Incomplete or Missed Jobs by Technician

Identify technicians that are not performing up to standards by missing or not completing jobs.

Contract Uptime

Percentage of uptime for an installed product covered by a contract.



Profitability

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Warranty Leakage

Lost revenue from confusion of costs and what is actually covered in the warranty.

Service Contract Attach Rate

Percentage of installed base also covered by a contract or warranty.

Service-to-Cash Cycle or DSO

Gap between when the technician completes a job and accounting receives payment or the amount of time it takes to recognize revenue.

Contract Leakage

Lost revenue from a service that should be billed but instead is given away by the technician. Often a result of confusion on the technician's part about what is actually included in a service contract.

Upselling Rate (Sales on Field Service Jobs)

Track how many sales your technicians are making in the field.

Technician Billable Time

Ratio of billable to productive time - could be an indication that not enough equipment is covered by a maintenance contract.

Revenue From Services

How much of total company revenue comes from provided services.

Percentage Conversion of Warranties to Contracts

How many products under warranty are being sold as a service contract before expiration.

Customer Retention

Loyal customers can sustain a business and is cheaper than customer acquisition.

Percentage of Renewed Maintenance Contracts

How many maintenance contracts are being renewed.

Cost to Serve

How much it costs the business to provide the service and what is influencing fluctuations.



Compliance

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Health and Safety

To monitor and track compliance against health and safety protocols such as reducing the number of employee and contractor injuries, manufacturing process incidents, and environmental breaches.

Jobs Meeting or Missing SLAs

Average delay of late jobs in hours reveals type of jobs that typically run late.

Percentage of Jobs Not Meeting SLAs by Technician

Identify performance highs and lows to optimize resource management and technician work load.

Customer Satisfaction (CSAT) Rate

Helps to identify future profitability. Satisfied customers equal loyal customers who tend to buy more, stay longer, refer business, and recommend your organization.

Average Response Time

Average time per work order to respond to the customer. Knowing this metric can help you understand how your organization is performing and in evaluating how SLAs may be compromised.

Average SLA Compliance Rate

Missing SLAs has implications for customer satisfaction and downstream revenue, and it's crucial for customer retention and service profitability.

Mean Time to Complete (Average Resolution Time)

Average time it takes to complete the entire job.



Process

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Routing Efficiency Rate

Tracking technicians and ensuring the right tech is at the right job with the right parts and equipment at the right time can have a major impact on productivity.

Overtime Hours

Excessive overtime can lead to shrinking profits by adding to labor costs without seeing a rise in billings. Analyzing patterns in overtime hours helps managers see the factors behind overtime hours and identify problems.

Percentage of Ordered Parts being Returned

The return of unused ordered parts can have a direct impact on productivity and customer satisfaction.

Jobs Scheduled

This metric measures the success of your operations team in coordinating mobile

assets, accurately predicting time on site at each job and creating an estimated schedule.

Completed vs. Invoiced Jobs

Tracking the rate of completed service calls versus those that have been invoiced can capture lost revenue and reveal areas that need improvement.

Field Technician Utilization Rate

Breakdown of work performed by technician (productive time vs. total working hours). Based on amount of time spent working on things that are part of the job description vs. time filling out time sheets, attending meetings and other activities unrelated to productive work.

Employee Retention

Tracking the rate at which you're retaining employees can be a big factor in business success; it's cheaper to retain employees than to hire new.

Average Travel Time/Distance/ Calculated Mileage Costs

Reduce the amount of travel and identify where routing can be more efficient.

Customer Acquisition Cost (CAC)

This is a marketing metric, and the goal is to have lower CAC. By tracking the amount of spend on an ad vs. the number of booked jobs resulting from that spend over a certain period can help determine which promotional channels are working for your business and which aren't.

Emergency Parts Order Costs

Track how often your technicians are rushing out to purchase last minute parts.

Conclusion

Deciding on which metrics to focus on in your field service organization is fundamental to your success. Once identified, it is critical to ensure that all individuals and teams are aware of these, that they are communicated clearly and updated regularly. Knowing the metrics to measure – and the business intelligence that comes from them – means field service leaders have the ability to align service teams to work together towards meeting the company goals. The individuals and teams have a shared focus on what matters most to the business, the impact they can have and the results they can expect to see.

The insight, greater visibility and understanding of the business allows management to focus on taking action based on decisions made from available real-time information. Operational issues can be more easily identified and rectified quickly and effectively. The business intelligence helps identify trends and creates context, so productivity can be improved, and efficiencies made. This ensures that the organization is fully optimized, not only through the day-to-day enhancements, but with operational insights consistently being fed back to business and management.

This enables a real-time feedback loop which results in a cycle of continual improvement for the field service organization.

Analytics provide this business intelligence and will continue to develop so the potential in field service is vast. It is no surprise that research consistently shows that field service leaders see analytical tools as a priority for their technology investments.

By knowing the metrics to measure and capturing business insights through analytic capabilities, field service operations can be elevated, transforming it to a value-driving organization within the wider company. This will deliver real results such as increasing productivity, customer satisfaction, and revenue - all taking service to the next level of providing competitive advantage - a vital step in any business.



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

Call us on

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UK **0800 098 8487**
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Email us at sales@fieldaware.com
Visit www.fieldaware.com

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

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