

Field Service Management: Tips for Successful Integration





Introduction

We live in an increasingly connected world and those who work within field service experience this more than most.

This is because field service operations are increasingly complex with so many elements feeding in to the end-to-end workflow and relating to the wider business management. Not surprisingly, no one single solution can

fully address and manage all the aspects in an organization, so integration of systems and solutions with your field service platform is critical to achieving business success.

Integration capability tops software selection criteria consistently for field service leaders. Here we reveal the top tips for successful integration:



01.

Don't fear integration

Many organizations can be put off integrating different and seemingly disparate solutions as it may seem too complicated or there may have been negative experiences with integrating software in the past.

Integration technology today has advanced so far that with the right field service management software, this can take minimal time to be up and running successfully.

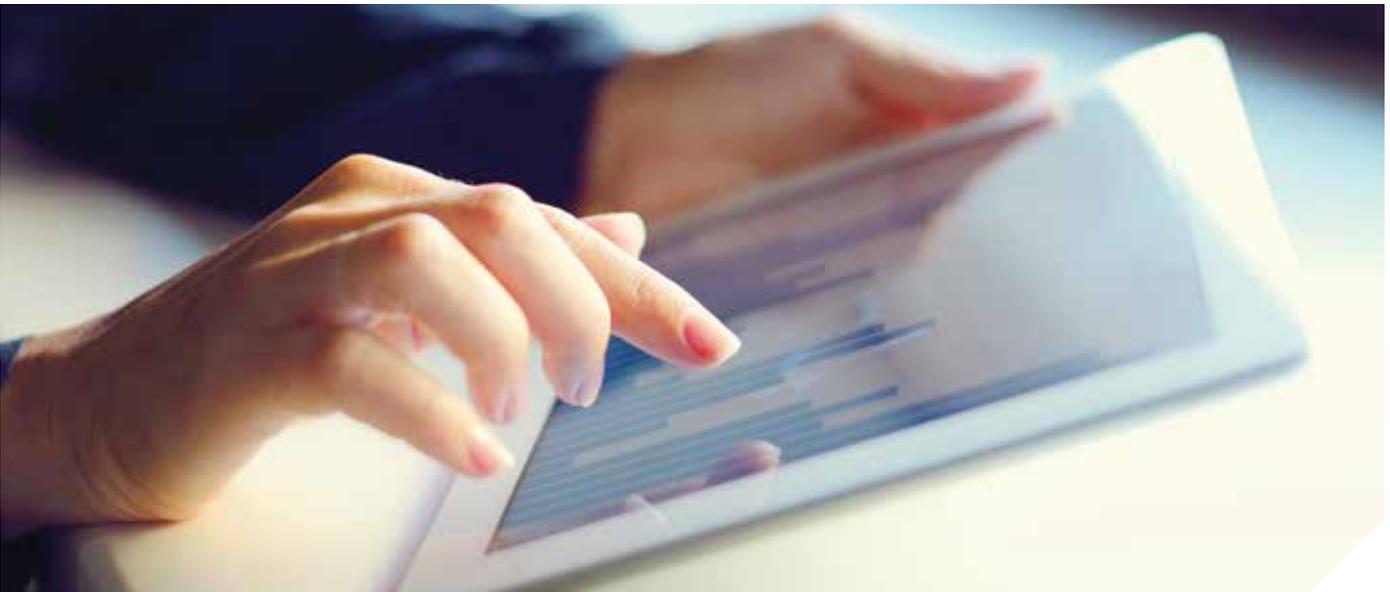
You may want to look for a platform that has been engineered with an Open API, which provides the means to integrate technology and workflows into existing systems, without having to disrupt any ERP, CRM and/or accounting systems.

It is not something that as an organization you need to do alone so look for a partner who will help you through a successful implementation from their experience and track record.

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Tip: Understand and prioritize integration to realize the benefits as soon as possible

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CASE STUDY: Cross Refrigeration implemented FieldAware for Salesforce in just five days

The business was able to move forward very quickly to realize the benefits of the automated solution and how it extends the value of Salesforce out into the field. The results that Cross Refrigeration has seen are significant. Scheduling and dispatching have been improved. As work orders are received, the back office is automatically updated with job status, product usage and other data which then flows through to the relevant technician so they have the needed information.

The Cross Refrigeration technicians have prompts in the information they have for

any additional services and maintenance contracts they can offer, as well as access to customer information through the integration with Salesforce. This makes it as straightforward as possible for technicians while face-to-face with our customers.

“ This alone has led to a **15% increase in overall revenue** without any staff increases and provides greater benefit to our customers from the improved service we can deliver.”

02.

Clean up your data capture

The right integration can mean that data is collected and input just once and flows in a bidirectional communication between the field and back office.

Data is immediately available to all those who need it and is updated instantly. The benefits are significant, but it can still mean ‘garbage in – garbage out’ which renders your integrated data useless.

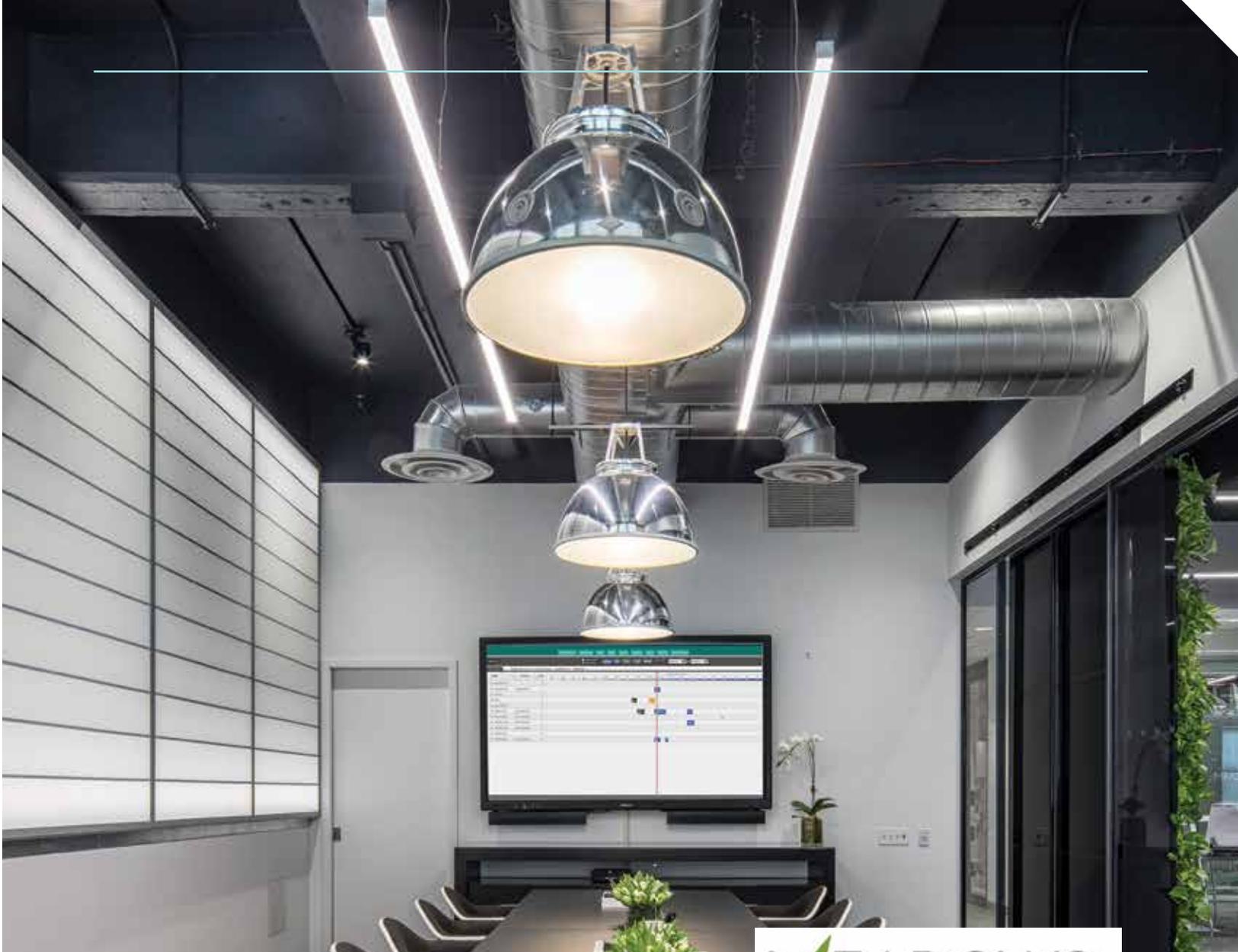
Best practice for successful integration means starting with a clean set of data records to be integrated, scrubbed free of any duplication or other errors prior to integration. This will ensure not only a clean set of data to move forward with at ‘Go-Live’, but also enable the business to have the best sense of awareness of the state of the data as they begin to analyze and compare data results between both systems.

Plan to use a field service solution which can then ensure that the ongoing captured data is accurate with a user-friendly interface, designed specifically for field users, which streamlines the data collection process with prompts, pre-fill and auto-fill capabilities and prevents entry errors.



Tip: Ensure data records and capture is accurate as part of any integration program





CASE STUDY: Meadows Service Group



Meadows Service Group looked at an integrated solution as the field service processes they were using were not visible to everyone and were manually updated outside of their CRM and ERP systems, so there was lots of room for error.

Implementing FieldAware for NetSuite has significantly impacted their service;

customer satisfaction has improved, technicians are more productive because they are equipped with all the information they need, and the payment cycle is faster.

“

We can handle more jobs and are seeing less errors and repeat trips, which translates into true ROI.”

03.

360° Analytics

Today, field service leaders realize they need analytics that enable them to make more informed decisions to continue to grow their business.

Just having analysis from field service data is not enough. There must be the ability to use all the data being collected across finance, CRM, ERP and FSM solutions. Organizations that recognize the value that analytics delivers, see the importance of a closely integrated and connected field service within the wider company.

Business leaders understand that the true integration of these technologies maximizes the overall value beyond the sum of the parts. A comprehensive field service management platform integrated with a suite of business

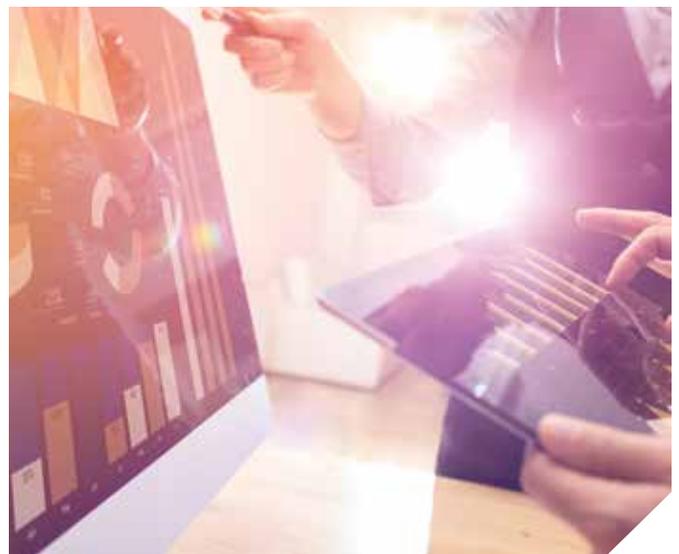
solutions is how field service becomes a greater part of a fully connected business and where the greatest application of analytics can be seen.

The empowered field workforce, armed with the contextual insights that integrated analytics provides, are enabled to creatively interact and work with other teams and departments. These new interactions further unlock the value for the company in terms of customer service, sales or product development to fuel competitive advantage.

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Tip: Maximize the value of integration even further with the right analytical tools

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CASE STUDY: Intimus International

Intimus International had implemented NetSuite to streamline and simplify their accounting practices and resource planning and wanted something compatible to improve their operational services. Intimus selected FieldAware because of the deep integration with NetSuite, ease of implementation and ease of use for the schedulers and engineers.

Other FieldAware clients have stated that the use of analytics in their business has increased margins from the ability to drill down into KPI drivers and utilize reports

to help improve efficiencies. They comment that ‘what’s measured, gets done’ as the ‘subjectivity’ is removed from decisions from the ability to capture factual performance.

“

FieldAware has a very simple mobile app for engineers and at the same time, it gives me a huge amount of complex information. When an IT solution can offer me that, **I’m very pleased.**”

04.

Proven partnership

Don't let software providers just talk about "integration" but be sure that you understand what you need from the integration and the degree solutions will be integrated.

Look for a provider who will not only get you up, running and integrated but will also provide ongoing support to ensure greater success in maximizing the value you derive from the solution. It will help address the service challenges you are facing today as well as where you want to take your organization in the future.



Tip: Plan for today and tomorrow with any ongoing support you need in place





CASE STUDY: Allied Glass

To streamline their field service processes, Allied Glass recognized they wanted to implement an automated management system, but an integration with their accounting software, QuickBooks, was crucial. FieldAware provided that seamless integration and the support they needed to be up and running fast.

Invoicing had always consumed a great deal of time in the business, and previously an invoice would take about a week to get sent.

Now it is the same day and it gets copied across their field service and QuickBooks accounting software all at the same time, speeding up efficiency and saving time.

“
We are more on top of customer service and it is easier to get to them and get them their quotes and invoices as well. **We are saving days for sure.**”



Conclusion

From working with a range of companies in different industries, we know that whatever type of field service organization you manage, integration of your business solutions can be fundamental to success. More so, integration and keeping everything connected has never been easier.

Essentially the integrating of field service solutions into existing and other business systems means there is no disruption to ERP, CRM and accounting systems. Ultimately this delivers synchronized workflows, enhanced reporting and results from the current systems through the integration of data and the actionable outcomes.

Field service leaders recognize that integration can elevate their field service operation, transforming it to a value-driving organization that delivers real business results and takes their company to the next level.



With today's
integration, there
is nothing to fear and
everything to gain.



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

Call us on

US and Canada **800-935-0736**

UK **0800 098 8487**

Australia, APAC **1800 821 628**

Email us at sales@fieldaware.com

Visit www.fieldaware.com

About FieldAware

FieldAware is 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 customer to 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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