Making The Move To Mobility:
The Digitalization Of Field Service

The new wave of mobility in field service management

FieldAware™

Introduction

Field service organizations have always embraced technology, being early adopters of field service management software since it was introduced in the late 1970s. Originally designed as on-premise, server-based scheduling solutions, the software was very much focused on enabling the back office to improve the efficiency of work order scheduling and dispatch. Technicians however, had only limited access to job and customer information due to the cost and performance limitations of existing devices (proprietary handheld devices or laptops) and networks.

The mobile evolution has shifted this balance. With the widespread adoption of smartphones, for example, over the last decade, digital mobile devices now form an integral part of both work and personal lives. Add to this the proliferation of tablets in the last mobility wave five years ago with the introduction of the iPad and most companies now use some form of mobile device. This use may be a mix of smartphones, tablets and laptops, but as such the focus of the service work has now moved significantly on to the field technician.

In a recent report[1] by Aberdeen Group, best-in-class organizations state that their top strategy for growth is to invest in mobile tools to provide service workers with better access to information. Access to information in real-time via mobile tools empowers the service team with the right answers at the time of service, ultimately providing greater levels of customer service and resolution on a first visit.

Aberdeen state that organizations must adapt or face losing customers to the competition. Changing customer dynamics and the amplified influence of empowered customers has led two-thirds of organizations to focus on the field.

So how can an organization manage this shift to focus on the field without compromising back office operations?

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1 Evolution of the Field Service Business – Optimizing the Service Supply Chain (2015), Aberdeen Group

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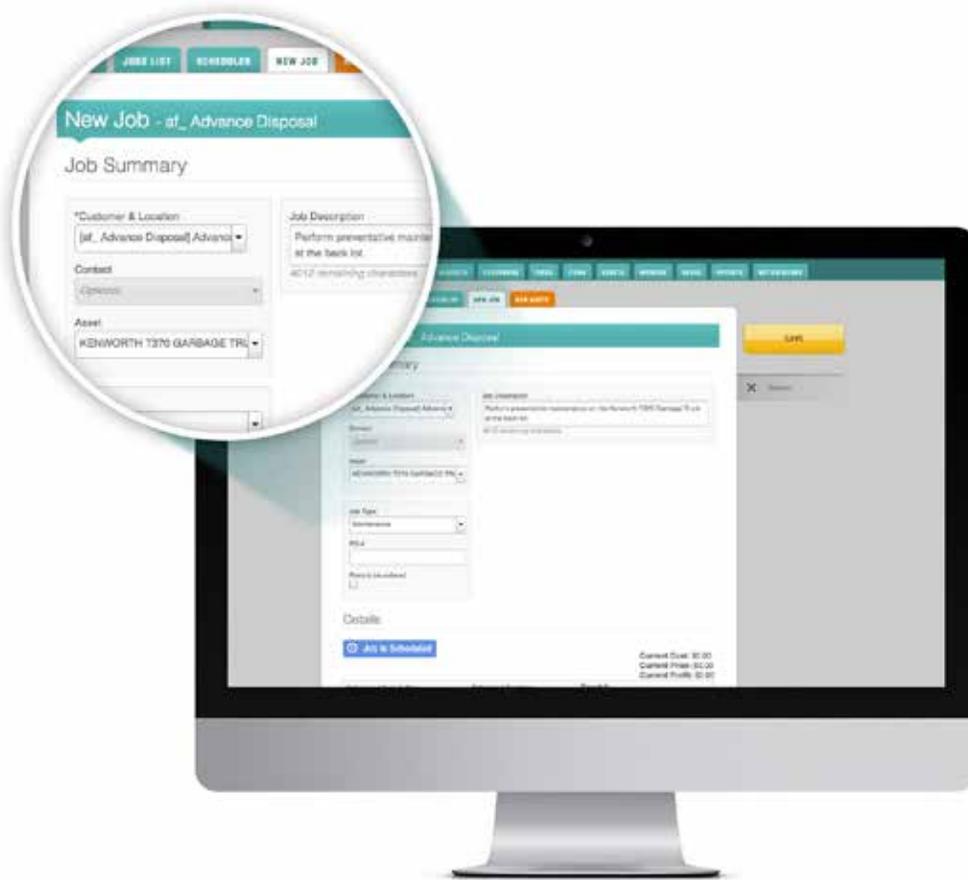
Extending the BackOffice into the Field

Although the technician is the "new" priority for field service organizations, back office processes remain essential components of any service operation. The right mobility solution gives the whole organization the ability to manage the workflow seamlessly and keeps all operational elements connected.

There is visibility of the work and day's performance and whether a complex, fully optimized and automated scheduling system is needed or a manual drag and drop solution is employed, the mobile piece allows decisions to be based onreal-time activity and updates.

For the back office, a mobile solution which easily integrates into existing systems is critical, as often within a field service organization a mix of best of breed solutions are employed due to the niche nature of the work carried out. This can often mean that systems are used in isolation and data from one system doesn't always assimilate with others. An integrated mobile solution means that the two-way flow of data and information is captured just once and in a consistent and efficient way. It means that no data is left unused or delayed while waiting on paperwork submissions or for collected information to be downloaded and an audit trail is in place reducing the chance of any lost or missing information.

The next challenge comes with implementation. Most companies have suffered with unrealistic promises of technology implementation timelines, that then turn in to a multiple-year project with escalating costs. A benefit of mobility is it can be much quicker to deploy so businesses should seek out mobility solutions which are straightforward to implement. Being up and running in days, not months, is critical to not only the smooth running of the workflow but also to the return on investment (ROI) of the solution, as time is not lost in a long implementation phase. Leading mobility solutions are now available on app stores, downloadable to any handheld in seconds and up and running in minutes.

Once implemented, the two-way flow of information means that many tasks can be automated from the field as soon as jobs are completed. A work order for example can be issued, then on job completion the customer can be invoiced immediately, achieving a quicker payment cycle through this order to cash automation.

The result of the right mobility solution is extending the work of the back office out into the field in a robust and reliable way, connecting the operational workflow and ultimately ensuring service objectives are met.

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Empowering the Field Worker

Managers and technicians, alike, report that the key to any technology implementation is ease of use. Taking time to learn new, complicated ways of working puts up barriers to adoption which workers may well look to by-pass and either go back to the way things used to be done or patch together their own and disparate ways of using the various solutions. Equally both older technicians and newer more technology-savvy workers may resist the change, but with a solution that is easy to use the implementation is easier and quicker adoption inevitably means a better ROI.

For a field worker the right mobile solution means they are empowered to do their job in the best possible way. Critical information can be accessed and shared in real time both in the field and the office, and the enhanced knowledge and collaboration this brings enables better decision-making and ultimately improved resolution.

Through integration with other back office systems, such as ERPs and CRMs, the field worker has access to the job history and customer records allowing for a more detailed understanding of not only the task at hand but also what has happened before and why. Knowledge of the different elements of the task are often fundamental in the delivery of service excellence and turning up

to site with this information at hand or having access to it, delivers an improved customer experience.

While improved customer satisfaction may be a key objective for any service organization, the right mobile solution also delivers enhanced worker satisfaction. Technicians report that the right mobility solution brings great advantages. The workflow becomes easier so job completion rates improve and all the benefits that this brings to the field technicians, customers and the service organization.

More technicians are happy to use their own devices – bring your own device (BYOD) – in their work capacity and its often cited as being a fundamental part to the successful implementation of a mobility strategy.

Reports shows that there is generally quicker user adoption with BYOD, greater employee satisfaction and lower costs for the organization. It is therefore essential that any mobility software can work across

multiple and mixed digital devices. Furthermore, for those organizations looking at expanding the role of their service operation the ability to generate new quotes and work orders from the field may have appeal. Mobile apps can enable technicians to sell more, more easily as they simply use drop down menus to generate a new quote or work order, then capture the customer's signature electronically to verify acceptance. the answers they need quickly, while they're on the site.

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Implementing Mobility and the next evolution

While it is recognized that most companies now use some form of mobility, it is also acknowledged that the majority still do so in a basic way; to enable a checklist approach to their work. Those that still work with paper-based systems report they will look to move to digital mobile platforms in the near future, understanding this disadvantage affects their ability to be competitive.

With the evolution of mobile solutions moving so rapidly, one that is agile and scalable will be required to meet changing and developing needs of the business. Having solutions which are quick to update and roll-out will mean the business doesn't stand still waiting for their technology implementation to catchup with their operation.

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Layering the simplicity of mobility over the complexity of the existing solutions will help to leverage their use.

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Focus on the right mobility solution

So, whether you are looking at developing a current mobility strategy or introducing a mobility solution for the first time, how do you choose the right software for your business with the many solutions on offer today?

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 principals that cut across the different requirements.

Ease of integration is a key component of any mobility solution as there is no need to upgrade the entire end-to-end solution to simply allow better workflow to and from the field. There will have been 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 mobility over the complexity of the existing solutions will help to leverage their use.

The implementation of the mobility solution needs to be as quick and straightforward as possible. A lengthy implementation process can feel like it is defeating the objective of achieving a faster, more streamlined workflow. So being up and running in days, not months should be the realistic goal meeting the business objectives and delivering a much faster ROI.

Any mobility solution should be easy and intuitive to use. Systems that are any more complicated than they need to be will take longer for workers to adopt, may be bypassed and worked around. Field technicians, by the nature of their work, tend to accept technology changes positively but how quickly they take to mobility solutions will again affect the ROI. A long drawn out adoption of any solution will have a serious effect on efficiency during the time taken and in the longer term impact employee satisfaction with the technology.

Ease of use for technicians should also include how the device is used as well as the app itself, as one hand operation, for example, can be important. It may seem like a little thing, but allowing a technician to keep one hand free - and still operate the app - is a big advantage in the field. One hand operation is especially important when the technician is downloading and viewing the schematics of equipment or paging through a repair manual.

All mobility software needs to be agile and able to move with the next generation of mobility. Developments are moving fast and with such technologies as augmented reality becoming an actuality in field service, once user cases are proven and costs start to come down, keeping up to speed with these changes is imperative.

With the wide range of different devices being used across a workforce, whether through BYOD, the use of contractor workforces or different requirements it is crucial for any mobility solution to work across mixed digital devices. It may be that separate apps are needed for

smartphones and tablets, for example, with tablet users wanting to take advantage of their bigger screens and faster processors to display more data. Smartphone users need data displayed clearly and legibly. The apps, therefore need, to ensure that all types of users find the apps easy to navigate and easy to use.

As well as working across different devices, the apps will need to work across different operating systems. With native iOS and Android apps the capabilities of the operating system can be enabled to include features like voice recognition, click to call, photo, video and document attachments and offline operation into the solution.

Vitally, the crux to mobility is the anytime, anywhere access to customer, location and equipment information as well as service history. It is essential that mobile apps make it easy for technicians to view service-related information quickly and easily. For example, map views of the destination (including turn-by-turn directions), tasks, customer contact, equipment type, serial number and associated service or maintenance agreement - even notes, photos, manuals, videos associated with the work order are all instantly, and easily available.

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Focus on performance

The face of field service has changed. Technicians are the priority, and they need the tools and access to the information that will transform them from corporate overhead to revenue and profit generating brand proponents.

Technology has changed. The world has "gone mobile". Smartphones and tablets are powerful and relatively inexpensive, and the networks that support them are fast and reliable.

Mobile apps must have capabilities which take the technicians' role into account, without forgetting the back office. Cloud-based web applications deliver advanced capabilities(scheduling and dispatch; asset, parts, customer and roles and rights [security] management; employee time tracking and comprehensive reporting) and must be easy to use and easy to integrate with existing ERP, CRM and accounting systems.

Ultimately, having a mobility strategy in place with the right mobility solution for you allows for better empowerment, data sharing and collaboration out in the field. For a field worker the right mobile solution means they are empowered to do their job in the best possible way. Critical information can be accessed and shared in real time both in the field and the office, and the enhanced knowledge and collaboration this brings enables better decision-making and ultimately improved resolution.

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

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About
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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.

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

Call us on
US and Canada   **800-935-0736**
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