



# WHAT TO LOOK FOR IN A FIELD SERVICE SOLUTION



# OVERVIEW

The right field service solution will be able to modernize your company, increase efficiency and profits. However, not every solution is the same. It is important to be thorough in your analysis of a vendor to ensure their product meets your needs without expensive customization.

To get you started in the process of finding the perfect field service solution, this document outlines the key features to look for. Use this information as a general feature checklist when performing your initial assessments of field service solution options.



# SCHEDULING AND DISPATCH

Scheduling and dispatching are critical functions of a field service organization. When looking for a solution for your company, you will want to find one that will make scheduling as easy as possible for your dispatchers. You will also want to ensure that the communication between the office and field is instantaneous. If an emergency call is received or if there are last minute changes to work orders, it is crucial to relay that information as quickly as possible. These features will improve customer satisfaction because they will be tended to quickly when emergency needs arise. The scheduling feature should also include routing capabilities to minimize the travel time of your field workers. They will consistently be using the most efficient route possible.



## USING A FIELD SERVICE MANAGEMENT SOLUTION CAN...

- Increase overall productivity by 15%
- Achieve a 98% on-time arrival
- Decrease overtime by 75% (if not completely eliminate it)

# JOB TRACKING AND MANAGEMENT

## FIELD SERVICE MANAGEMENT SOLUTION BENEFITS

- Increase jobs completed each day by 47%
- Reduce customer waiting time from 4-8 hours down to 1 hour



It can be difficult to communicate with technicians when they're on an assignment. Some crucial information may come into the office but there is no way to communicate that to the technician in a timely manner. Look for a solution that incorporates a way for both the office and the technicians themselves to comment on jobs. The technician should be able to track and comment on everything that needs to be completed for the customer, and the office should be able to track the technician's updates and add their own as needed.

# CUSTOMER MANAGEMENT

"Loyal customers, they don't just come back, they don't simply recommend you, they insist that their friends do business with you."

-Chip Bell

The best way to ensure you generate repeat business is to track a customer's journey from beginning to end. With a proper customer management portion of the solution, you will be able to track all of your sales

as well as make it easier for the salesperson to know who to contact for repeat business. If you are already using a customer management system, ensure your new field service solution is compatible and can be integrated with it.



# INVOICING

Having an invoicing feature will make sure that your business is paid for their services as quickly as possible since it will eliminate the delay between when the job is completed and the customer receiving the invoice. The field service solution you choose should cover all of your invoicing and billing needs. This should not be limited to only one kind of invoice, but be able to change according to the job and circumstance. Look

for a product that will let you obtain signatures when needed. Being able to secure a signature within the system will streamline the billing process and minimize the hassle for the customer. Once the invoice is created and sent to the customer, an ideal solution would be able to track when payments are received. This will allow your billing department to easily know who to follow up with when necessary.



# REPORTING

A key feature for supervisors, managers, and owners is reporting. This will allow the executives to determine what practices are effective and which are costing the company money. Through analysis, decisions can be made that will be focused on generating income. A good reporting feature will also allow users to view customer feedback trends to ensure that customers are satisfied, and therefore more likely to become repeat business.



## YOUR REPORTS WILL MOST LIKELY SHOW...

- 40% decrease in miles driven
- 15% reduction of people needed in the field
- Savings of \$5,000 to \$20,000 per field service employee per year

# JOB COSTING



Salespeople can spend hours of their work week determining the proper estimate for a job. That is valuable time that could be spent communicating with potential new business. Finding a field service solution with a job costing feature will allow the salesperson to give an estimate of the job cost quickly and accurately. This avoids wasted hours trying to calculate what the proper estimate is, and avoids giving an estimate that is either too high to gain the customer's business, or too low to make it profitable for the company.

# INVENTORY AND ASSETS

The larger your company becomes, the more important it is to be able to track inventory and assets. In an optimal solution, this feature will give your business insight into what the ideal quantities of items to have available are. It will also notify you of when items or tools need to be restocked or replaced.

As the company grows, it is important to keep in mind how assets will be stored. If they will be housed in more than one location, the best inventory feature will allow you to track where each item is located and if that is the most beneficial place to have it in to ensure low travel time for field workers looking for parts.



# SUMMARY

Your field service organization will most greatly benefit from a solution that features scheduling, job tracking, customer management, invoicing, reporting, job costing and inventory management. Researching each vendor before

purchasing will determine if their product fits the needs of your business or if heavy customization and additional fees will be required. The right field service solution should solve your pains in all of the categories listed with little to no extra cost for you.

