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TEN CRUCIAL CONSIDERATIONS FOR EVALUATING AND SELECTING FIELD SERVICE MANAGEMENT SOFTWARE

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Field Service Management software solutions abound. In fact, a search on a popular business software directory returns well over 225 companies that claim to offer Field Service Management software. Many of these companies are very small, of course, and their software has limited capabilities, or has been developed for a specific niche industry, such as air conditioning repair or landscaping. Even so, the same directory reveals more than 30 commercially available Field Service Management software solutions systems that offer robust capabilities, and could be considered enterprise-worthy.

Faced with that many options, how do companies looking to purchase and deploy a modern, enterprise-class Field Service solution make the best possible choice?

This paper briefly describes ten important criteria that should be crucial elements in the evaluation and selection of Field Service Management software for service, maintenance, and repair operations.

SERVICE REQUEST CREATION EFFICIENCY AND ACCURACY

The terms Service Request, Service Order, Problem Ticket, Trouble Ticket, Work Order, and Incident Report all mean essentially the same thing—someone, or something, needs some type of maintenance, service, or repair to be performed. It could be that a device is broken and needs to be fixed, a new piece of equipment needs to be installed, old equipment needs to be de-installed, scheduled maintenance is due, a hardware or software upgrade needs to be applied, machinery needs to be relocated to a new site, a customer needs to talk with technical support, or just that a customer wants to meet with a service manager, and a wide array of other possibilities.

Regardless of the reason, the process of creating and storing that request for service in a database must be easy, fast, and accurate. A comprehensive Field Service Management system will facilitate just that. Customers requesting service should be able to log those requests for service through a variety of methods: via an Internet portal, by email, through telephone IVR, via a chat window, and, of course, by speaking with a contact center agent. Moreover, today's Field Service Management software should enable automatic service request creation using Machine-to-Machine (M2M) communications, which can allow smart devices in the field to transmit performance and potential trouble information the Field Service software.

COMPREHENSIVE CUSTOMER INFORMATION

Field Service Management software must be able to store complete information about the customer requesting service, or automatically and immediately retrieve that information from a connected customer information system. Such data will include: customer name and address, service site address, site access information, phone number, email, contact(s) details, business hours, customer history, customer priority and/or status characteristics, national or parent account details, pertinent accounts receivable data, and all other service relevant data.

This information should automatically populate the incoming service request record, and relevant data must be provided to the service technician(s), crew or technical support representative who will be responding to the customer's request for service.

DETAILED EQUIPMENT INSTALLED BASE DATA

Similarly, a Field Service Management solution must store—or have automatic and immediate access to—all the information about the equipment installed at the customer site, and specifically for the device or equipment requiring service. Data should include: equipment type, model, revision, location at site, all service and maintenance history, configuration particulars (including as built, as shipped, and as maintained configuration history), previous installation and ownership history, and all other information which could influence service and repair actions.

Like the customer data, these details must be embedded in the service request record and transmitted to the staff that will be assigned to the customer's service request.

ACCURATE ENTITLEMENT DETAILS

Nearly all devices and equipment installed at customer sites are covered by some type of service entitlement at some point in time. When the equipment is first installed at a customer site, it is generally covered by a warranty for some period of time, often 30 or 90 days, or a year or more for complex expensive equipment. Once the warranty expires, service for that equipment is often provided under an extended warranty, a service agreement, or a maintenance contract—common terms with essentially the same meaning. These warranties and service agreements are generally referred to as service entitlements. Customers pay a fee, generally in advance, for the service agreement, which "entitles" them to receive service on the equipment covered by the service agreement.

Entitlements specify the terms and conditions of the service coverage. For example: the entitlement might provide service labor at no charge, but parts replacements could be billed to the customer at 50% of list price; a baseline service contract might

authorize service for a customer eight hours per day, five days per week; a premium agreement could provide service around the clock, seven days per week. A wide variety of service and payment terms is often available to the customer.

Entitlements frequently also include Service Level Agreement (SLA) commitments. For example, SLAs on a basic service contract might guarantee the customer a twenty-four hour on site response; whereas SLAs on a premium service contract might promise the customer a two hour on site response, and complete problem resolution within four hours.

A fully featured Field Service Management solution will recognize all the terms and conditions of these warranties and service contract entitlements, including coverage start and end dates, service coverage conditions, and relevant SLA commitments. The complete warranty and/or service agreement information must be made available to the person or team handling the customer's request for service.

RAPID TRIAGE AND ASSIGNMENT

Equipment problems can often be diagnosed and corrected without dispatching a service technician. Even when an on-site visit to correct a problem is necessary, preliminary problem diagnostics can often pinpoint the possible or actual cause of the problem. These preliminary diagnostics can alert the responding technician to take the appropriate parts, tools, and documentation to the site, thus assuring a faster resolution to the problem and a happier customer.

Complete Field Service Management software will empower contact center agents to triage incoming service requests to determine which could potentially benefit from remote diagnostics and possible problem resolution, and which must be immediately dispatched to a field technician. Ideally, the software will enable the creation and maintenance of a knowledge base that can guide both in-house support staff and field service technicians in pinpointing the source of the problem and identifying the steps to problem resolution. The software should assist in determining which person or support group could make the best use of the knowledge base and effectively execute the remote diagnostics steps.

OPTIMAL DISPATCH AND SCHEDULING

Dispatching and scheduling technicians to field work can be a complex task, especially in large organizations with dozens, hundreds, or even thousands of field workers. An all-inclusive Field Service Management solution must be able to automatically dispatch the most appropriate field service resource and schedule that resource to arrive at the problem site at the most appropriate time. That's no easy task. Numerous factors must be evaluated: technician skills, technician location, work in progress, jobs already scheduled, problem priority, customer priority, customer location,

customer entitlements, appointment time commitments, SLA commitments, customer hours, and many more. Furthermore, conditions change; new emergency service requests arrive, appointments get cancelled or rescheduled, technicians are unexpectedly unavailable, severe weather disrupts the schedule, etc. Field Service Management software must include an intelligent scheduling engine, powered by robust scheduling algorithms and user-definable business rules, which can create and adjust the schedule as necessary.

Moreover, a complete solution will determine the best possible route field technicians should follow as they travel from site to site throughout the day. It will also provide the field technicians with "turn-by-turn" directions to their destinations on their mobile devices.

EXTENSIVE MOBILE TECHNOLOGY DEPLOYMENT

To be most effective and most productive, a service organization must have instant and accurate information about field service activities. It's no longer enough to get updates from field workers by phone, or by occasional batch downloads from the worker's mobile device. Dispatchers and managers need to know what's happening in the field right now, not minutes or hours from now. And they need to be instantly aware of changes and new events that may impact or require alterations to the current schedule. This can only be achieved with the deployment of robust mobile devices and technology to the field staff.

Today, Field Service Management software must enable remote communications using the latest available mobile devices, such as smart phones and tablets. Ideally, it will offer support for the most popular mobile platforms, including Android and iOS, thus empowering companies to allow their field workers to use their own smart devices to manage their work. (Commonly known as BYOD–bring your own device).

The solution must provide instant two-way communications between the host server and the remote devices when the technicians are connected via the Internet. It must also allow field users to view, manage, and record work details in an off-line mode when not connected, and automatically sync both incoming and outgoing data once an Internet connection is reestablished.

THOROUGH SERVICE AND REPAIR DATA CAPTURE

The very nature of Field Service is maintaining and repairing equipment. In the process of executing those services, field service technicians engage in a variety of activities. They travel to the customers' sites; they diagnose the problem; they take corrective action and repair the problem; they order parts; they replace parts, assemblies, or entire units; they send components or assemblies back for repair or scrap;

they replenish supplies; they apply engineering or safety changes; they update equipment configuration; they install, relocate, or remove equipment; they advise and educate users; they sometimes collect payment for the service provided; they may even sell products, supplies, or additional services; and finally, they complete the service and travel to the next service event.

All of that activity, and more, must be documented and stored in the appropriate database(s). A Field Service Management system must not only enable the recording of this vital data, it must ease the data entry process and ensure the recorded information is as accurate as possible. The system should allow users to define labor and travel codes, service type and status codes, priority and urgency codes; and a wide assortment of other relevant attributes and terms that will become part of the service event record. It should then validate data entered against those user-defined terms to assure data accuracy. Ideally, the software will provide for the creation of drop-down lists, which will both ensure data accuracy and ease data entry.

COMPLETE DEPOT REPAIR PROCESSES

Service and repairs aren't always done in the field. Many types of products are best repaired and serviced at a repair facility, commonly referred to as a "Repair Depot". Smart phones, tablets, laptops, personal printers are just a few examples of the types of equipment that are routinely sent to repair depots for service; it's neither practical nor economical to dispatch technicians to repair these devices.

Even when service is performed in the field, parts or sub-assemblies removed during field repair are often returned to a Depot to be repaired, rebuilt, refurbished, retrofitted, or upgraded. These restored items can then be restocked and available for use in future service events, or potentially sold as equivalent to new. Items that cannot be economically salvaged are generally scrapped.

Comprehensive Field Service software will manage entire Depot Repair processes as well. It will:

- issue appropriate Return Material Authorizations (RMA) and track the progress of goods returned under those RMAs;

- recognize when parts that are replaced in the field should be returned to a repair depot for repair and restock;

- enable advance exchange processes, allowing a good item to be shipped to the field or a customer in advance of receiving a defective item needing repair;

- allow the transfer of items needing repair to third party repair shops, and track the return of those items back to the repair depot that transferred the item, or directly back to the customer;

- track the movement of the item in repair through the entire repair process, and record all relevant repair data;

- guide the repair bench technicians through the repair process, with step-by-step repair, test, and quality assurance instructions;

- and more.

ROBUST BUSINESS ANALYTICS

Logging incoming service requests; identifying customer and entitlement details; triaging and diagnosing equipment problems; assigning and dispatching technicians; effectively repairing and restoring equipment to operation; accurately and thoroughly capturing service repair details – these are all important ingredients of Field Service operations. But there's one more essential element required if a Field Service Management solution is to be considered genuinely complete and robust—its reporting and analytics capabilities.

A truly comprehensive and thorough Field Service Management solution will provide powerful reporting and business analytics tools. To a large extent, such tools should be user configurable, allowing authorized users to define both the appearance and content of reports and dashboards. The users must be able to gather and summarize data that will: reveal service operations and financial performance and highlight areas demanding attention; graphically display trends; divulge shifts from historical performance; pinpoint impending trouble spots; and much more.

SUMMARY

Service organizations that are, or will be, in the process of evaluating field service software should be sure that both the solution and the vendor they select can meet or exceed each of the ten critical considerations described above. Anything less will be short of ideal.

The IFS Service Management solution meets all these requirements. The software was designed exclusively from the ground up for field service, provides complete and robust service functionality, offers easy user customization, includes multiple remote access capabilities, contains sophisticated analytics and reporting, and is backed by an organization and staff that has implemented and supported the software at hundreds of service organizations in a variety of industries for 30 years.

ABOUT IFS

IFS is a globally recognized leader in developing and delivering business software for enterprise resource planning (ERP), enterprise asset management (EAM) and enterprise service management (ESM). IFS brings customers in targeted sectors closer to their business, helps them be more agile and enables them to profit from change. IFS is a public company (XSTO: IFS) that was founded in 1983 and currently has over 2,700 employees. IFS supports more than 2,400 customers worldwide from local offices and through partners in more than 60 countries.

For more information about IFS, visit **www.IFSWORLD.com**

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IFS EQUIPS PINDAN WITH COMPLETE MAINTENANCE AND MOBILE SERVICE CAPABILITY

Pindan Asset Management has implemented IFS Applications™ in three months to support a mobile-enabled enterprise solution for the recently awarded Department of Housing maintenance works and services contract. Efficiencies have been achieved by giving both Pindan and the Department of Housing real-time visibility of work order status including automated invoicing. Additionally, IFS Applications has equipped Pindan's service technicians with the right equipment, at the right location to complete the job within the SLA timeframe.

ABOUT PINDAN

Established in 1977, Pindan has prospered as one of the leading property and construction companies in Western Australia.

NEW BUSINESS OPPORTUNITY

Pindan Asset Management is a new division created to support the expansion of Pindan and to provide complete whole of life asset management and facility maintenance services. Having won a tender to service and maintain the Department of Housing's 6000 houses across various regions in Western Australia, one of the terms for winning the contract was that Pindan required an integrated system to support the whole of life asset management and facility maintenance service requirements. Furthermore, the system needed to be tightly integrated with Department of Housing's ICT systems for complete visibility and real-time information.

The existing systems supported throughout other divisions in Pindan could not readily adopt the maintenance environment required to support the Department of Housing's contract. Pindan Asset Management went to market for an integrated asset management and facility maintenance solution. Pindan needed to be capable of meeting both its functional requirements and complete implementation and go-live in a tight timeframe of three months. "It was clear from the onset that IFS was the only vendor capable of meeting all our requirements. Furthermore, with a local team on the ground and excellent local reference sites, we had the confidence knowing that they could deliver," says Stephen Arndt, General Manager, Pindan Asset Management.

INTEGRATED ASSET MANAGEMENT AND FACILITIES MAINTENANCE SYSTEM

IFS Applications was selected due to its leading and globally recognized functionality in supporting the complete asset lifecycle with a strong mobile platform. "The functionality and configurability in IFS Applications means we can support the Department's houses complete asset lifecycle," says Arndt.

IFS Applications best of breed functionality also meets ISO 55001, "a requirement for our business," says Arndt. Servicing an area over 1 million square kilometers with high-volume and low-cost transactions across the harsh desert is no easy feat. Pindan required a strong mobile platform to ensure its service technicians

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can work anywhere, anytime. Equipped with mobile devices, Pindan's technicians work in a completely paperless environment, accessing information shared between Pindan and the Department of Housing to support each work order. Supported with the right equipment to service and repair the assets, staff can take photos, upload valuable information such as time spent, spare parts, purchase requisitions, expenses and costs, service history etc. to complete the work order. "Our very first work order in IFS Applications took only 45 minutes to complete, which was highly impressive," says Arndt. "We required our service technicians to be equipped with an office and all the right tools in their van to meet the 150+ work orders a day without returning to base," says Arndt. IFS Applications has enabled Pindan to employ an efficient lock-step process for each work order, thus standardizing processes for capturing and sharing information across the business from the onset. It has forced technicians to be consistent, and by capturing the same information across all jobs means Pindan has improved accuracy and visibility in order to make executive decisions impacting the business. "It has standardized and created huge efficiencies in the way we respond to a job and, most importantly, we can bill Department of Housing immediately, which has a positive impact on cash flow." By having the knowledge of what assets the technicians are repairing, staff can accurately plan and carry the right spare parts, thus optimizing service efficiencies across the business.

At first, staff were reluctant to try a new system, and more so on mobile devices. "It took one month to convince our technicians of the benefits and now they just love it," says Arndt. Pindan has enjoyed increased usability and higher productivity through IFS Applications. "We are currently processing on average 4-5 work orders per person a day, and in 12 months' time, I foresee this being around 6-7 work orders being processed a day through further efficiencies," says Arndt.

"A POWERFUL SYSTEM TO SUPPORT US NOW AND IN THE FUTURE"

IFS Applications has enabled Pindan to achieve lean operations while optimizing resource utilization across such a huge land mass. "Both our parent company Pindan and the Department of Housing is very happy with IFS Applications and how it supports the complete asset lifecycle and facility maintenance services," says Arndt. "IFS Applications is a proven and robust system that interfaces and is easily configurable to meet both Pindan and the Department of Housing's needs." IFS Applications is completely scalable, so it can grow with Pindan. "By having IFS Applications, we have secured another client and added another 400 houses to our portfolio to maintain—all without having to add additional resources. That is a testament to the power of IFS Applications and the positive impact it has had on the business," says Arndt. Pindan has already seen massive improvements in the way it does business. "We are forecasting an additional 20% improvement in service efficiencies within the next 12 months through further process improvements," says Arndt. "IFS Applications is a powerful system to support us now and in the future."

BENEFITS

- Increased service delivery
- Improved process workflow
- Improved cash flow
- Complete visibility into operations

SOFTWARE

- IFS Projects™
- IFS Maintenance™
- IFS Supply Chain™
- IFS Financials™
- IFS Human Resources™

"The IFS team is very knowledgeable and the ability to deliver the system in a short timeframe of three months is a testament of the capability and power of IFS Applications and the team."

Stephen Arndt, General Manager,
Pindan Asset Management

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If you need further information, e-mail to info@ifsworld.com, contact your local IFS office or visit our web site, www.IFSWORLD.com