

The Field Services Technology Stack

Automation Is Critical to Boosting Productivity and Increasing Revenue

A White Paper from LogMeIn and TSIA

EXECUTIVE OVERVIEW

Technology is incredibly important to field services operations. Various platforms and applications are required to understand customer history, account entitlement and consumption, appointment scheduling, and to perform on-site repairs. TSIA has identified 17 separate application categories recommended for highly productive, scalable field service, including core infrastructure technology, productivity tools, and tools to understand and track customer behavior and sentiment. Field services executives should understand which enabling technology components are already well adopted, as well as emerging tools that may provide a boost to operational and financial metrics.

EXTREME AUTOMATION FOR FIELD SERVICES

Field organisations have long been pressured to “do more with less.” With product revenues falling as technology shifts to a cloud economy, that pressure is stronger than ever. On-site repair organisations have always been heavy adopters of technology, and a new focus on mobility and wearable technology is creating opportunities to further drive productivity improvements as well as increase service revenue.

We are seeing increasing pressure on field services metrics.

- 65% of field services members still consider reducing cost and driving efficiencies as a very important or important objective of their organisation.
- 77% of field services organisations provide mobility tools to their workforce, and nearly 70% have observed improvements in workforce productivity.
- Nearly 30% of field services organisations are enabling engineers to recommend new features and enhancements that will increase adoption and consumption with technology.
- The increasing importance of spare parts has led to 68% of field services members providing access to inventory and availability.

To buck the industry trends in these critical metrics, TSIA members need to identify Pacesetter practices across all phases of people, processes, and technology. Our benchmarking program and other survey projects provide the data necessary to identify employee performance goals and establish best-in-class practices. This report focuses on the technology component.

In order to take the next step in boosting productivity, technology can be a great enabler. Not only can basic processes like appointment scheduling and route planning be automated, but also analytics can give you new insight into your business, including real-time performance dashboards and resource forecasting tools. This report will define the various technology components that TSIA recommends companies evaluate. Some are standard infrastructure products practically everyone has, others are newer, more innovative solutions that may help provide you with a competitive edge.

TECHNOLOGY CATEGORIES RELEVANT TO FIELD SERVICES

TSIA tracks adoption, satisfaction, and planned spending for technology specific to service operations. In the 2014 Global Technology Survey, the following technology categories were identified as relevant to field services.

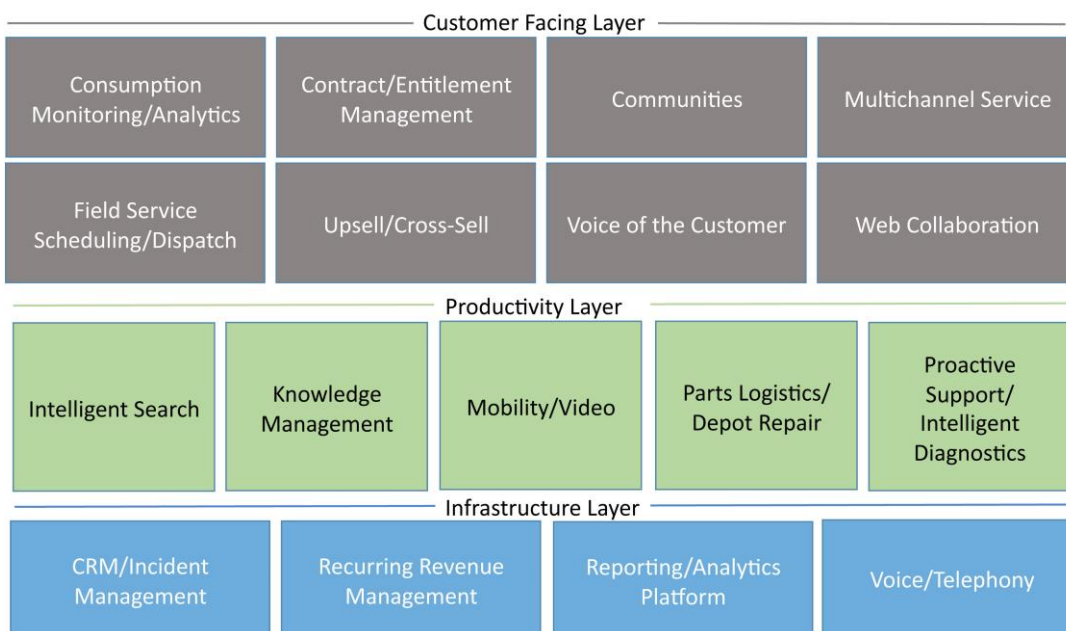
- **Consumption Monitoring/Analytics.** Consumption monitoring/analytics are tools used to measure and monitor customer consumption of technology, gauging how quickly customers are adopting new tools, common process flows, top-used features, number of users, length of session time, etc. Consumption monitoring is a key piece of shifting toward outcome-based services.
- **Contract/Entitlement Management.** Contract/entitlement management is a suite of tools that tracks which customers have current warranties, service contracts, or maintenance agreements with your company. This includes the ability to easily check if a customer has a current contract in place, i.e., that they are entitled to service, as well as features, to automate contract renewals.
- **Customer and Employee Communities.** Online customer and employee communities designed to enable peer-to-peer support and share information internally and externally; includes discussion forums, expertise tracking, reputation models, moderation, etc.
- **Enterprise CRM/Incident Management.** Enterprise CRM is an enterprise deployment of CRM (customer relationship management) across sales, marketing, and service. This platform tracks leads, opportunities, campaigns, accounts, and contact history. Incident management is used to track an occurrence of a customer question or problem through to resolution; also known as case management, service requests (SRs), or trouble tickets.
- **Field Service Scheduling/Dispatch.** Field service scheduling and dispatch technology is used to automate the scheduling of field service technicians and provide automated routing information.
- **Intelligent/Enterprise Search.** Linguistic-based search platform, including analytics for sophisticated reporting; allows content in any format or location to be indexed and searched.
- **Knowledge/Content Management.** Knowledge management or content management technology is used to capture, maintain, and reuse knowledge.
- **Mobility/Video.** Mobility and video in service are tools for improving productivity and accuracy by leveraging mobile and video technology; includes tools to mobilise field service technicians, professional services consultants, and other service employees, giving them access to corporate content, collaboration, and workflow from anywhere, including video knowledge or training content.
- **Multichannel Service/Self-Service.** Multichannel service and self-service includes non-phone customer interaction channels (email, web chat) as well as self-service technology.
- **Parts Logistics/Depot Repair.** Parts logistics and depot repair technology is used by field service operations to manage spare parts inventory and to automate the in-house repair process, from the creation of the return material authorisation (RMA) to billing and shipment of the repaired product back to the customer.



- **Proactive Support/Intelligent Diagnostics.** Proactive support and intelligent diagnostics is an emerging category of tools used to remotely monitor customer equipment for error conditions; may include auto-resolution or notification features.
- **Recurring Revenue Management.** Recurring revenue management tools are used by service professionals to manage the sales and renewals processes for maintenance and support contracts. Functionality includes automating renewals, renewal dashboards, and analytics that predict likelihood of renewal and manage profitable contract/maintenance programs.
- **Reporting/Analytic Platforms.** Reporting/analytic platforms are analytic-based reporting platforms used to do sophisticated trend reports and create reporting portals such as a services dashboard.
- **Voice of the Customer.** Voice of the customer technology includes survey and reporting tools used to track transactional, periodic, and project customer satisfaction. In addition to customer survey tools, voice of the customer technology includes quality monitoring for agent performance, as well as voice and text analysis of assisted, unassisted, and social interactions.
- **Voice/Telephony Platform.** Voice/telephony platform is the infrastructure used to route inbound customer voice interactions via phone; typically includes skills-based routing, right channeling, voice menus (IVR), real-time volume management, etc.
- **Upsell/Cross-Sell.** Upsell and cross-sell technology is a set of tools that prompt support techs and call centre agents with personalised offers to present to customers during an assisted support session; tracks offer extensions and accepts. Upsell/cross-sell enables seamless selling during support interactions.
- **Web Collaboration/Desktop Sharing.** Web collaboration/desktop sharing is a collection of web-based tools used to enable collaboration between employees and customers; includes web chat, proactive chat, screen sharing, online meetings and training, and webcasts. Remote control/desktop sharing is also included in this category.

Figure 1 shows each of these technology categories as part of the field services technology stack, categorised by customer-facing tools, productivity tools, and infrastructure.

Figure 1: Field Services Technology Stack



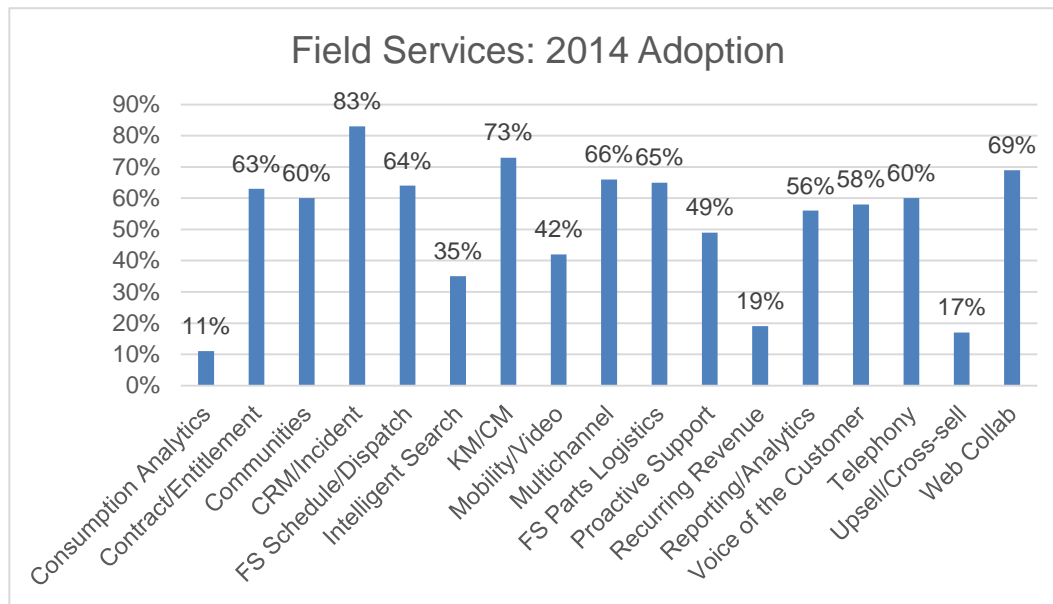
Source: TSIA 2014 Global Technology Survey.



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In *Figure 2*, the percent of customer support members using each component of the field services technology stack is shown.

Figure 2: Field Services Technology Adoption



Source: 2014 Member Technology Survey.

While some technology categories, such as CRM and knowledge management, show very high levels of adoption by TSIA members, other categories remain untried by many companies and represent a great opportunity for boosting customer adoption and increased service revenue.

TSIA RECOMMENDS

With the increased complexity of today's products and the ever-growing number of customer interactions, clearly, investments in field services technology are a primary avenue to meet and exceed customer expectations for service levels. But knowing where to start is difficult, with many different products offering a similar ROI story. When deciding where to make incremental investments, TSIA Research recommends:

- **Benchmark your technology footprint against other members.** How does your company compare to the adoption numbers shown in *Figure 2*? If you are missing technology that more than half of companies are currently using, maybe it is time to revisit how that technology can assist you in meeting your quality, optimisation, and revenue-generation goals. Also, be sure to evaluate what best-of-breed technology offers today compared to homegrown systems.
- **Include integrations in Phase 1 of the project.** Integrating technologies, such as knowledge management, incident management, and remote control tools, can boost adoption and improve performance. When implementing new technology, identify key integration points and push to include these integrations in the initial phase of the project. Too often, critical integrations are pushed to Phase 2, which never happens.

INTRODUCING RESCUE LENS

Rescue Lens is a new feature of LogMeIn Rescue via which end users can use their smartphone or tablet cameras to stream live video back to the support technician.

Running both Android 4.4+ and iOS 7+, Rescue Lens is included with the latest release of Rescue (v7.6). All your end users have to do is quickly download an app from Google Play or the iOS App Store, enter a pin code to ensure security, and start the camera rolling.

With this new information stream, your support technicians will be able to diagnose and resolve issues, without having to rely on inefficient (and often erroneous and incomplete) verbal and written descriptions of what's going on. Its real-time interactive video gives your technician a clear view of the problem at hand, and the ability to help a customer solve it by leveraging:

- **Smart Whiteboarding:** Support technicians can annotate on screen, on any device. This annotation stays in place, even if the device is moving.
- **Adaptive Video Quality:** Streaming remains fluid, regardless of the strength of the Internet connection.
- **Auto Focus:** Support technicians can easily focus on exactly what needs their help.

And best of all, Rescue Lens is fully integrated into LogMeIn Rescue. Your technicians get another view of a support situation, and the Rescue Lens session is captured along with all of the typical session details, including video recordings when needed. In addition, all of the information can be synced into any integrated ticketing systems.

ABOUT LOGMEIN RESCUE

LogMeIn Rescue delivers powerful on-demand remote support to users and devices anywhere, anytime, and from more devices than any other remote support solution. Intuitive, innovative, and customisable remote diagnostic tools provide a seamless user experience and enable technicians to tackle both simple and complex issues easily and effectively. Rescue is an enterprise-grade cloud platform, built with the power, security, scalability, and reliability a large professional help desk expects, with 99.99% uptime. To learn more or start a free trial, visit www.LogMeInRescue.com.

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