



The Roadmap to Field Service Engagement

Transitioning from a Cost Center to Engagement Driver

ClickSoftware



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INTRODUCTION

SHEP HYKEN ON THE FIELD SERVICE LANDSCAPE

Field service customer expectations are higher than they have ever been. Companies are promising a great customer service experience, but only some are delivering it. Companies are touting their accolades and awards, which creates high expectations. When a customer receives good service from a company, and not necessarily a company in our industry, it sets the bar higher for everyone. The customer will expect – or at least hope – they receive the same level of service from you.

The last field service technician (from another company) called an hour before he got there. He was on time. He was clean. He was friendly and helpful. Now the customer calls you. Can you deliver at the level of the customer's last experience? It's expected, and when you do, it is also appreciated in the form of more business and word-of-mouth referrals.

To win in today's field service landscape we must recognize that every interaction, however small, is an opportunity to create an impression. It's the way you dress, greet the customer, clean up after the work, say good bye, follow up with a call to make sure the customer is happy and more. You don't have to WOW your customers every time, but you must be consistently and predictably at least a little above average. Anyone can be good (better than average) some of the time – even most of the time.

The best companies, and their people, are better than average all of the time. That's what makes them amazing.

Are you ready to deliver greater value to customers all day, every day? That's what field service engagement is all about.



Shep Hyken,
New York Times Bestselling Author &
Customer Service and Experience Expert



WHAT IS FIELD SERVICE ENGAGEMENT?


Field service engagement is both a mantra and a model.

We developed this model to help field service organizations gain a competitive edge in an evolving service landscape. We have confidence that our partners, and all service organizations can achieve this, and so much more with the advice contained in the following pages.

Why field service engagement?

It's time to focus on the ways technology can make field service management better, not just more profitable and efficient.

Today's technology stands to transform field service more rapidly than ever before. Organizations that embrace new technologies stand to improve customer engagement exponentially. Many early adopters of advanced route mapping, augmented reality, the Internet of Things, and self-service are discovering the immediate gains these technologies unlock.



Unfortunately too many focus on the technology, and not the customer. If we want to prosper amidst advancements, we must prove fancy technology adds value to the end user. Today's customers have unprecedented service options, and access to unfathomable amounts of data. As a result, the pace of change in platforms, solutions, and customer loyalty have never been faster.

The bottom line is too few field service management organizations are stopping to ask, "Exactly how will this newfound customer behavior impact my service?"

It's in direct reaction to these trends that we have developed a framework for field service organizations to achieve new and lasting connections with their customers.

Shall we begin?

FIELD SERVICE ENGAGEMENT DEFINED

Field service engagement is the connective tissue between technology and customers. It is the human aspect of technology that stands to reinvigorate trust, care and quality in our industry.

It is a quantifiable set of actions that—if followed—will result in customer retention as a result of our field operations, and streamlined service that can be represented in cold, hard data.

Field service engagement is a fundamental shift in thinking—a belief that technology will support improved field service, and lasting customer relationships.



ROAD MAP TO FIELD SERVICE ENGAGEMENT

In the following pages, we will discuss the four pillars of field service engagement.

At each stage of your field service journey, we will explore tips, statistics, and best practices. We'll even hear from some of the leading minds in field service. We hope it helps service organizations see the human impact of field service technology, realize the potential for growth and grasp the immense responsibility we carry as ushers in a new field service era.

The pillars of field service engagement include:



SECTION 1

DISRUPT WHAT ISN'T WORKING

Why Disruption Matters

Few would describe field service as a business of emotions. But in today's digital world, field service customers' needs are getting left behind. Field service management must start here, if we wish to survive.

As an industry, we face new challenges, and suffer from outdated practices. Some outdated practices negatively impacting both customers and field service operations include:

- 8-hour appointment windows
- Route mapping technology from the 80s
- Skills gap due to changing workforce demographics
- Knowledge loss as aging workers exit the workforce
- Higher operations costs due to increased customer experience demands

Our **Uberization of Service** study demonstrated a big gap between current customer expectations versus service realities.

"Your most unhappy customers are your greatest source of learning."

Bill Gates, Co-Founder, Microsoft

Fewer than 5% of consumer respondents indicated that they have received communications from a field service supplier via “Uberized” channels such as social media, real-time mobile tracking, Interactive Voice Recognition (IVR) or a suppliers’ website, despite this being the newfound customer expectation.¹

Many other troubling disconnects exist. For example, “quick time to appointment” was listed as a top consumer priority, while just 3% of suppliers ranked “response times” as a top service priority.¹

Field service providers need to shift how they view field service. We must disrupt what isn’t working with honest conversations. We must disrupt what’s stuck, broken, busted, and frustrating field service customers.

The break must be clean, and include new customer scripts, human-centric goals for field service techs, and an ongoing organizational dialogue about the long-term value of improved customer interactions. Customers will receive faster resolutions, new self-service frameworks, and greater personalization.

It won’t be easy. But it will be exciting, and imperative to the long-term survival of any field service organization.





The Customer of Tomorrow

A brief look at the American Customer Satisfaction Index would have us believe more than 70% of Americans are generally pleased with the service they receive.² But a deeper dive into studies about industries like cable TV, uncover that as few as 3 out of 54 companies receive better than middling scores.³

As customers gain access to pricing information, reviews and expanded service options, their affinity toward any one brand wears thin.

An Accenture study reported 64% of consumers switched providers due to poor customer service. In addition, 60% said they are more likely to switch providers today, compared to ten years ago.⁴

Frankly, they have ample reason. Customer service has been in a nosedive for the past forty years, due to automation and cost-cutting. Seeing the ripe and cheap opportunities of increased automation, many service-based organizations have implemented practices that frustrate customers to the point of leaving.

You've heard the horror stories. And most field service providers know they can do better. But this shakeup is not just about customer frustration. It's about the massive business growth opportunity service organizations must embrace.

As many companies struggle to modernize, the service organizations that leverage customer-centric technology most quickly will win in both customer satisfaction, and profit.

Now is the time for modernizing technology to meet specific customer demands. In the following pages, we discuss how to make it reality.

"We see our customers as invited guests to a party... It's our job every day to make every important aspect of the customer experience a little better."

Jeff Bezos, CEO, Amazon

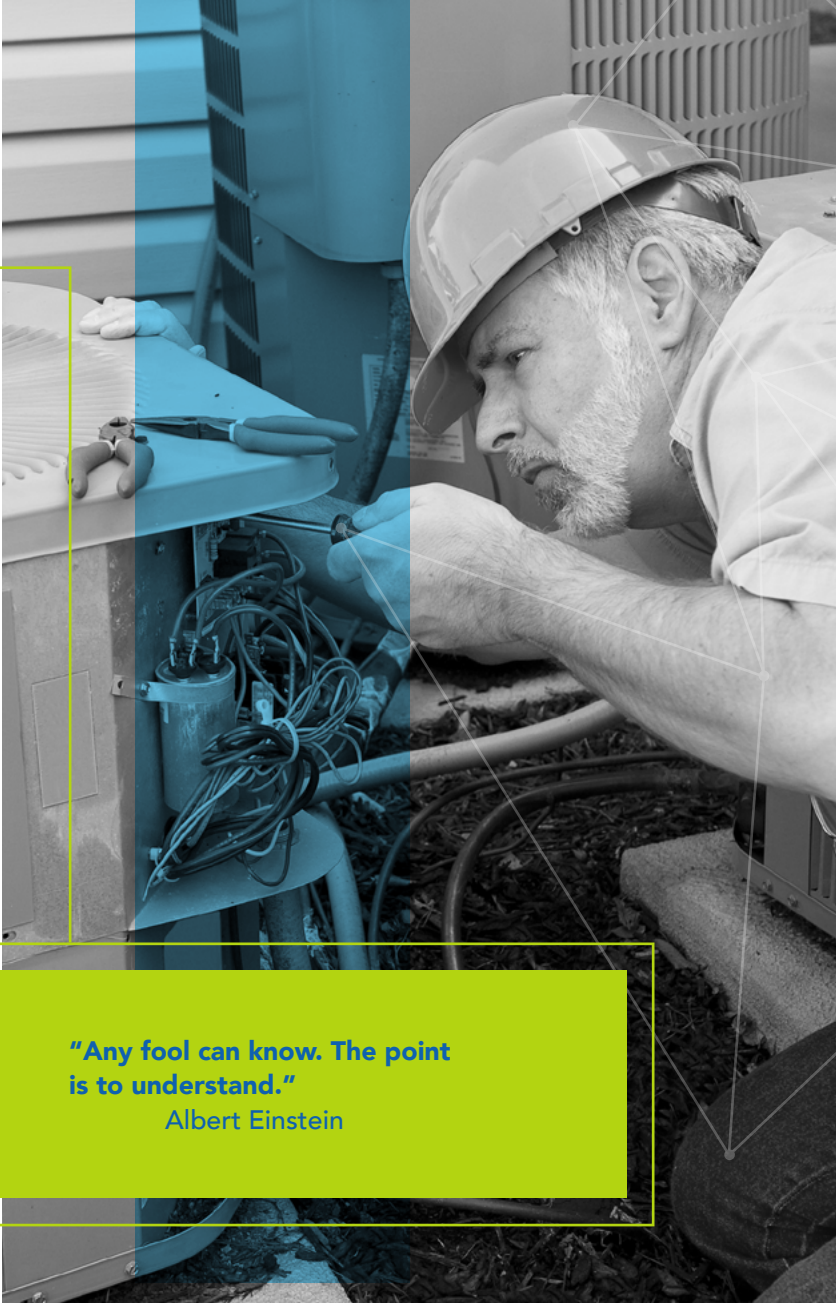
Performing a Disruptive Audit

Field service technology is a competitive market. But as we previously explored, field service on the whole is struggling to keep up with technology. Consider the fact that 52% of companies are still using manual methods to handle field service⁵; meaning, these organizations are using manual methods to schedule, track time, manage work orders, and invoice their field service jobs. No wonder customer complaints, needs, and communication are getting lost in the shuffle.

Whether your company is big or small, performing an audit is an essential step toward improved customer engagement. If you are just getting started, here's how to perform a disruptive but highly actionable audit.

Step 1: Track the Right Metrics

We've heard from countless service organizations that the massive amount of data available today can be crippling. Interpreting, and acting upon specific customer data can prove time-consuming, but actionable intelligence is exactly what's allowing the most successful service providers to get ahead. The first step towards success is identifying metrics relevant to your bottom line. Whether or not you have data to begin with, the following metrics are solid benchmarks.

A black and white photograph of a technician wearing a hard hat and safety glasses, focused on working on an electrical panel. The technician is using a screwdriver to adjust a component inside the panel. The panel is open, revealing a complex arrangement of wires and electrical components. The background shows a building exterior with a window and some foliage. The image is overlaid with a blue vertical bar and a white geometric pattern of lines.

"Any fool can know. The point is to understand."

Albert Einstein

Open Cases

Line of sight into open cases enables transparency, forecasting and faster resolution.

Ask yourself:

- How many cases remain opened after the first visit?
- How many cases is the average tech handling per day or week?
- How many cases are they currently assigned?
- What is an average number of open cases that your most successful field techs can handle at any given time?

Job Completions & Resolutions Data

Too few field service organizations look into what fuels job completions. Group resolution data and seek common traits to uncover what's working, and what's not.

Ask yourself:

- How does the organization define "complete"?
- What's a reasonable job completion timeframe?
- What made faster jobs move quickly?
- What skills do more efficient techs have?
- Is there correlation between completion rates, repeat customers, or customer satisfaction?

Route Info

Smarter route mapping can revolutionize a field force. Seek to improve the safety and efficiency of your routes, and you'll find greater profits also await.

Ask yourself:

- Is the time en route to job sites reasonable, compared to the number of cases a rep has?
- Was each customer visit warranted?
- Can routes be better optimized?
- How much drive time do techs log?

First Response Rate

Resolving cases quickly is key to customer satisfaction. Organizations that develop strategies for first-time resolution will also improve their bottom line.

Ask yourself:

- What's your average time to respond to cases?
- What percentage of cases are resolved in one response to a customer?
- Which customers aren't getting a fast response, and why?
- Which techs are resolving complaints in a single visit, and how are they achieving this?

Customer Satisfaction

Customer satisfaction is the golden ticket to field service success. Countless methods exist for isolating this data, both digital and in-person.

Ask yourself:

- Have you polled your customers recently?
- What's your churn rate, or how many customers are you losing each quarter?
- Do you have a system in place to determine customer satisfaction with field tech performance?
- Do you have digital means of gaining customer feedback?
- Are you using new mediums to access customer feedback, such as social media?

Net Promoter Score

A net promoter score represents how likely your customers are to recommend your business to a friend or colleague.

Ask yourself:

- How's my word-of-mouth advertising? Are customers recommending my service on social media, internet forums, or in-person with friends and family?
- Have you asked customers whether they are likely to recommend your business?



Step 2: Find Areas for Reducing Incident Costs

High incident management costs are one of the biggest drivers of lost revenue for field service organizations. It's no big surprise that they rank among the biggest field service customer frustrations too.

One of your key disruption strategies should be to track and reduce your overall number of field incidents. When internet, power, AC, or other services get interrupted, customers often show little patience. Here's what a strong incident analysis can help you uncover:

- Whether you are sending the right technician to the right job site
- Whether you are responding to incidents in a timely and appropriate fashion
- Why the majority of incidents are happening
- Whether there are broader patterns within incidents
- Whether you can do anything to prevent or predict and prevent incidents



"Mistakes are the portals of discovery."
James Joyce, Author

Step 3: Uncover Average Customer Lifetime Value

Calculating your average customer lifetime value is the third step in performing an actionable audit. With this data on hand, daily field service interactions take on a whole new purpose and mission.

We recommend pulling your team together to communicate the monetary importance of each and every customer. You don't have to share exact figures with field service staff, but even giving a range can help them understand the true value of service interactions. Here's how to calculate your customer lifetime value (CLV):

- 1. Start with the average profit each customer represents annually (e.g., \$1500)**
- 2. Multiply by the average customer retention (e.g., 5 years = \$7500)**
- 3. Minus the cost of acquisition (e.g., \$500)**

Total = (e.g., \$7,000)

- 4. Now multiply this number by your total number of customers**



Step 4: Evaluate Old Technology & Systems

Customer experience is the service industry's linchpin. We must ensure that every experience and touchpoint is fluid, seamless and enjoyable for field service customers. In a world where smart homes, virtual reality gaming and speech-to-text are becoming the norm, service organizations must keep pace with digital changes if we wish to connect with customers.

Unfortunately, many struggle to keep up.



A recent Salesforce study found that nearly half of all service agents feel their current tools in the field, "are not fast enough."⁶



Despite this fact, more than 70% of mobile workers will use a tablet, or hybrid device with tablet-like characteristics in the field by 2018, according to Gartner.⁷



"Science and technology revolutionize our lives, but memory, tradition and myth frame our response."

Arthur Schlesinger, Historian



HERE ARE THE CORE TECHNOLOGY AREAS TO FOCUS ON DISRUPTING FIRST:

Customer Feedback

Do you know anyone who loves filling out customer surveys? Neither do we. The great thing about cloud-based mobile and tablet technology is it allows for speeding the customer feedback loop. Digital devices allow organizations to get email addresses, follow up while service is top of mind, and gain insights from customers upon visit completion.

Field Interactions

Far too many field techs will visit a residence or business multiple times. This wastes valuable driving time and company resources. It's also a huge frustration and waste of time for the customer. New technology allows field service professionals to receive all pertinent digital information on mobile devices necessary to complete a job on the first visit. Info not available? Visit doesn't happen.

Route Mapping & Transportation

Driving is an inevitable part of field service. But, with real-time mapping data, field techs can adjust course on the fly to accommodate emergency jobs, traffic conditions, or customer cancellations. In addition, real-time features allow better means of tracking driver safety and behavior.

Work Order Management

Gone are the days of phone calls, missed connections, and piles of paper. New software allows field service management to achieve a seamless flow between work order communication, and job execution. By streamlining systems and reducing complexity, service organizations can truly achieve greater business efficiency.

SECTION 2

UNLOCK SERVICE-BASED INTERACTIONS

Every customer touchpoint offers potential. Every positive interaction can spark ten more.

After disruption has taken place, and all parties are aware that a new direction has been agreed upon, we must unlock value at every phase of both our external and internal field service interactions. In the following pages, we will discuss how to unlock greater value in every service-based interaction.

Getting Internal Buy-In

Customer experience is the fiercest battle field service management professionals must fight. In fact, Gartner research recently reported that nearly 90% of marketers expect to compete primarily on the basis of customer experience this year.⁸

But, delivering the right experience takes time. Gaining momentum toward new business models and technology requires achieving buy-in from C-Suite, on down to field service professionals.



Here are a few tips for getting started:

Make a Business Case

Customer experience is an investment. And like any other business expense, it will require a budget, objectives, target outcomes, and plenty of research into the how and why along each step of the journey.

Surface Customer Research

There are organizations that publish studies annually (e.g., Consumer Reports, Accenture, Technology Services Industry Association) that can serve as a nice starting point for benchmarks and ongoing dialogue about the importance of customer experience.

Keep it Positive

Change takes time. Being an advocate for the customer is an ongoing state of mind, not just a temporary project. Winning over everyone in your organization will take persistence, more than anything else.



Training Introduction: Keys to the castle

A full 76% of field service providers reported they have struggled to achieve profitable revenue growth, according to a recent Technology Services Industry Association study.⁸ The 24% of organizations that are consistently achieving high-growth and high-margin also exhibit, “a laser focus on the customer as evidenced by Pacesetter customer satisfaction results.” This is surprising, considering the latest MarketsandMarkets predictions indicate the field service management industry is growing at a rate of more than 20% per year.⁹

So why are so many service providers struggling to achieve revenue growth? And how can we train our field service staff to achieve higher satisfaction? According to McKinsey, it’s less about individual interactions, and more about the full customer journey:

“Measuring satisfaction on customer journeys is 30 percent more predictive of overall customer satisfaction than measuring happiness for each individual interaction. In addition, maximizing satisfaction with customer journeys has the potential not only to increase customer satisfaction by 20 percent but also to lift revenue by up to 15 percent while lowering the cost of serving customers by as much as 20 percent.”¹⁰

Your key to the customer satisfaction castle is training your staff to consistently deliver an incredible customer experience across all communication and touchpoints.

Training Part 1: Consistency

When field service professionals talk about consistency, they typically are referring to field-based activity. But there’s much more to gaining a consistent and positive customer experience than showing up with a smile to fix a problem. The scheduling, dispatch process, response time, and level of service on calls all contribute to the overall satisfaction of customers.

Here are three areas that can help improve field service engagement with consistency:

Appearance

Your website, marketing materials, and field service professionals should all be singing the same song. Aim to impress your customers by delivering a consistent look and feel across all visual aspects you can control. Logos, hats, shirts, trucks, paperwork, follow up emails: all of it should look clean, professional, and consistent. There’s a reason employees at Apple’s Genius bar consistently get the highest consumer satisfaction ratings in tech support.¹¹

8: TSIA; “The State of Field Services 2016”

9: MarketsandMarkets: Field Service Management Market worth \$5.11 Billion by 2020

10. McKinsey: “Customer Satisfaction Journey: Who’s up and who’s down”

11: Consumer Reports: “Where to go for computer tech support”

Script

Believe it or not, the words you choose have a great impact on customers. Develop a consistent script for phone-based interactions, as well as field-based visits. The promises your employees make, the words they use to describe your services, and even the tone of their voice can impact overall satisfaction of customers.

Field techs will undoubtedly face challenging service scenarios. Leadership has a responsibility to ensure techs are prepared to meet these scenarios with consistent, and high-quality service.

Timeliness

Field service providers are notorious for keeping customers waiting. On average, field service organizations offer customers service windows that span hours. Surprise customers by consistently beating industry averages with installation and service timing. This will require your organization to tighten up scheduling, but the long-term customer payoff is worth it.



Training Part 2: Self-service

More customers than ever are turning to reviews, videos, online content, and even web-based chat to answer their questions. With more data at their fingertips, customers are making increasingly smart decisions, based on significant online research.

Forrester research recently cited self-service as a top field service trend:

“We found that web and mobile self-service interactions exceeded interactions over live-assist channels.”¹²

Whether they are frustrated with the customer service experience, or simply desire the convenience of finding an answer whenever they please, field service organizations must address this shift in behavior.

Organizational training must include self-service tools and resources. Empowering your organization, whether through online content or staff interactions, to deliver resolution to customers at the exact moment they desire, will unlock greater value, and improve customer retention. Giving customers a range of service options requires service organizations to re-think their training models.

Here are a few ways you can bake self-service into your training:

Field-based Content

More than ever, field service pros are delivering knowledge, in addition to service. Consider equipping your field techs with digital and physical resources that further inform customers about process, equipment and resolution. Techs can point customers to deeper content repositories, chat engines, or other online tools that deepen long-term connections with customers.

Whitepapers, Brochures, Videos

Instead of just promoting your organization, develop materials that discuss the broader problems your organization solves. If you're an HVAC repair company, discuss what buyers should think about before, during, and after having a unit installed. List out rough costs, annual savings, or other key topics your customers are searching for online.

Chat

Offering customers the option to text message, web chat, or email prior to, and after service, can speed communication. Customer communication preferences vary greatly by region and industry, so be sure to leverage all the customer data you have available to deliver a customer-centric, chat-based experience.

ClickSoftware offers resources, and an online community called LeadersClub, where you can get answers to all your training questions. **Click here for more.**

Training Part 3: The Technology Layer

Building a just-right technology stack improves service efficiency and keeps organizations competitive. But getting there takes time. Many field service organizations face the same tough questions:

- Will the investment result in ROI?
- Will the extra training overwhelm my staff?
- How long will it take to implement?
- Will it really improve customer experiences?

This last question is the most important to optimal field service engagement. Let's now turn to the ways technology improves customer experience:

On-site Information

According to Salesforce, the top complaint among service agents is that current field technology is not fast enough, and they can't access all the information they need.⁶ To improve field-based interactions, and ensure true engagement, focus first on delivering better technology to field techs. Once in the field, your service professionals can only be as responsive as the technology supporting them.

Route Mapping

Using real-time, location-based route mapping software to improve your fleet's efficiency saves money, reduces wait times for customers, reduces fuel costs, and increases average jobs completed per day. With an added layer of machine learning, modern software combines real-time traffic and road conditions with historical data to recommend the absolute best route options. Note that not all software options are created equal in this regard.

Customer Booking

Modern technology options allow customers and service providers to take advantage of mobile and web-based appointment booking. This alleviates call centers, and streamlines the contact-to-booking process. Consider implementing live chat features, website forums, and leverage select digital in-person customer touch points to streamline future booking (e.g., booking a customer's next appointment while on-site using a digital device).

SECTION 3

OPERATIONALIZE HUMAN POTENTIAL

Performing service functions at scale is core to the DNA of field service organizations. A much less common trait is seeing potential in individual customer interactions.

In this new age of field service, this is exactly what we should focus on. Each internal and external touchpoint holds immense potential for unlocking a true culture of field service engagement. And training must reflect this belief, if we wish to see our organizations change.

In this chapter, we will discuss methods for implementing field service engagement by operationalizing human potential. We will uncover how to turn principles into practice, in both our corporate cubes and while in the field.

This activation requires training, challenging one another to grow, and as always, some elbow grease. But activating a new way of operating means working smarter, not harder. As Peter Drucker pointed out, effectiveness is about doing the right things, not just doing things right.



**“Efficiency is doing things right;
effectiveness is doing the right things.”**
Peter Drucker, widely acclaimed
Management Consultant, Author
of Concept of the Corporation

Scaling Ideas to Action

Training is a journey, not a destination. And field service organizations that wish to scale new field service management ideals to action should plan for big changes in their training programs. According to a study by Aberdeen, 76% of best-in-class field service organizations have formal mentoring or coaching programs. A measly 38% of lower-performing field service organizations have similar training in place.¹³

But what does training really mean? And how can you ensure it sticks? In order to operationalize the human potential of your field service organization, you'll need to scale policies across departments.



"Success in general is a well-balanced blend of luck, DNA, confidence, and hustle."

Gary Vaynerchuk
Founder, VaynerMedia

Consider some of the following training options:

eLearning

Develop interactive coursework unique to your industry that all employees have access to. Better yet, make completing the coursework a prerequisite for advancement within your organization. Despite what you've been told, this content doesn't need to be fancy. Rather, make it authoritative and engaging. It's better to have top managers shoot amateur footage and put out a training series privately on YouTube than offer nothing at all.

Classroom

The benefits of classroom learning are twofold: it allows for deeper questions to get answered and provides structure for developing crucial skills. Consider developing deeper coursework based on your eLearning materials, or tapping industry speakers to come in and provide training.

Field-based Mentoring

Job-shadowing and mentoring has long been relied upon in field service as a means for improving performance. Focus on coaching interpersonal skills and efficiency. Solid interpersonal skills can yield big gains in customer loyalty and even some positive online reviews.

Certifications

We're all motivated by recognition. And investing in a certification program costs next to nothing. Consider offering certifications based on levels of coursework achieved by employees. This will bring structure, offer healthy goals for employees, and systematize advancement.

Gamification

Gamification allows service providers to add simple badges, or creative incentives to each step of training regimens, and receive that extra bit of motivation they need. Consider creating game boards with each of your organizational certifications printed out. Then, allow employees to check achievements off the list in return for rewards of your choosing (a gift certificate goes a long way).

Not everyone likes having their job turned into a game, so be sure you deeply understand your employees' habits before taking heed of this recommendation. Or, consider allowing employees to opt-out of programs.

Unmasking the Many Layers of Change

Every organization contains complex cultural layers, unique management structures and rules for advancement. In large field service operations, some employees can feel far from the decision-making process. Field service engagement is about empowering employees at every level. True progress will happen when everyone from field techs to the Chief Financial Officer are on the same page. And organizational trust is built when these changes are made public.

Here are some field service engagement goals for professionals at every level of an organization:

C-Suite

- Realize customer lifetime value
- Re-connect with real customer data (customers, not the industry)
- Get back in the trenches (read customer complaints or listen to customer service calls)

Middle Management (Scheduling & Dispatch)

- Empathize with techs (by verbally recognizing frustrations or big wins)
- Get in the driver's seat (ride along once a month)
- Set incremental and achievable goals

Field-based Talent (Techs)

- Master new technology (and make it an asset)
- Treat each customer with care (like it could be the last)
- Proactively communicate with dispatch (help each other out)

Customer Satisfaction (Call Centers)

- Ask for a better script (push management to get more human)
- Smile
- Believe in a brighter future

"The strength of the team is each individual member. The strength of each member is the team."

Phil Jackson, NBA Coach

On Technology

Big data, wearables, mobile technology and the Internet of Things continue to offer new value to field service. While keeping up might feel overwhelming, there's no need to adopt every new device that comes along.

A good rule of thumb when it comes to operationalizing new technology is incorporating only those systems and devices that directly improve the customer experience.

In the following pages we discuss how to operationalize technology, without sacrificing the human side of service.



"Technology is nothing. What's important is that you have faith in people, that they're basically good and smart, and if you give them tools, they'll do wonderful things with them."

Steve Jobs, Apple Founder

Unboxing Expectations

Expectations for technology are sky high in every industry. Recent articles claim everything from field service payment processing to field-based customer interactions will look entirely different in a few years. Predictions include in-home 3D parts printing for self-service, augmented reality glasses for training techs, and smart homes and offices that send immediate service signals based on real-time performance. As fun as it may be to postulate on the future of tech, it's more useful to unbox our expectations in a realistic fashion.

No doubt, software and technology improve the customer experience drastically. Here are a few specific examples:

Logging Service History

9 out of 10 best-in-class field service organizations have a central database for taking advantage of field service history data.¹⁴ Making use of customer data is key to meeting future demand.

Improving Access to Information in the Field

Best-in-class field service organizations are 52% more likely to have invested in mobile tools that can provide techs better access to information in the field.¹⁴

Developing Technician Profiles

Best-in-class organizations are more likely to work with HR to create profiles for top techs to ensure their positions are filled with the right talent when and if they retire or leave.¹⁴



Right Solutions in the Right Hands

Implementing a new software or technology initiative requires getting the right tools in the right hands. An astronaut on a deep sea mission won't be much help, just like a dispatch manager who hasn't been trained on new technology won't handle new software efficiently.

As new technologies and implementations roll out, focus on ensuring each player knows exactly how to implement the technology involved in their daily work. Here are some ways field service organizations are empowering different team members with technology:

Access to Experts While in the Field

Nearly 75% of best-in-class field service organizations provide field techs with remote access to experts while at a customer site, thereby improving the likelihood of first visit, on-site resolution.¹⁵

Access to Knowledge While in the Field

50% of best-in-class organizations provide field techs with access to knowledge management systems that aid in troubleshooting and diagnosis.¹⁵ In the future, techs may wear augmented reality glasses that can help them troubleshoot issues faster.

Smarter Scheduling and Route Mapping

Dispatch managers with access to real-time route mapping technology can more efficiently manage their field force and scheduling.

Billing, Scheduling, and Route Automation

Using the Internet of Things and advanced software, field service organizations are effectively automating all of the processes that stand to free techs up to perform more crucial tasks, and spend valuable time with customers. Relationship skills will never be supplanted by technology, and automation solutions can get field service staff focused on customer satisfaction through deepening relationships.

SECTION 4

OPTIMIZE THE EXPERIENCE

The days of building custom field service software, or buying set-and-forget technology solutions, are quickly fading. As cloud technology advances, legacy systems continue to cause major outages and long-term IT problems. Constant technological change dominates both the field service landscape, and the end customer experiences.

How can we adopt new technologies to improve the customer experience, and face changes head-on? By adopting a culture of continual improvement.

We must leverage software that is flexible enough to evolve with changing demands. Field techs, corporate staff, dispatch managers and customer service must collaborate, and work together in new ways.

To help you achieve this end, the following pages contain tips for developing a feedback loop, improving the customer experience, and tactical methods for getting direct customer feedback.

↑5% = ↑95%

Increasing customer retention rates by a mere 5% can increase profits by 25% to 95%.¹⁶

"Continuous improvement is better than delayed perfection."

Mark Twain, Author

A Feedback-First Organizational Culture

Feedback can cause great frustration, or unleash newfound skills. It's our duty to cut through confusion caused by non-specific feedback if we wish to get the most from our software, processes and people.

Developing a feedback-first organizational culture will increase software implementation times, open up dialogue around best-practices, and strengthen the culture of your company. But, before you fire off an email containing paragraphs of input, let's examine some best practices for field service organizations:

A healthy culture of feedback includes:

Up, Down, Around

Feedback shouldn't just come from the top down. There must be avenues for employees at every level to weigh in on process, tools and performance.

A Belief in "Better"

In order for progress to take place, everyone must fundamentally believe that getting better is possible, that their co-workers can improve, and that everyone is capable of more. Root out negativity, and face it head-on.

Open, Honest and Courageous

A culture of continual improvement requires open, honest, and courageous feedback. Everyone must be willing to tell the truth gracefully and remain open to receiving thoughts from their co-workers. According to Josh Bersin, corporations with feedback-driven cultures enjoy higher employee engagement, and performance.¹⁷

Field Service Feedback Starters

Wondering how to kick-start a culture of openness, honesty, and positive progress? Try the following:

Roundtables

Hold monthly roundtables on specific industry topics like the Internet of Things, mobile field applications and route mapping. Invite professionals from different levels of the organization to discuss what works, what doesn't and how to improve. Feed your employees food (everyone loves pizza), and reward them for showing up! Feeding your employees free lunch has proven to produce an ROI of up to 150%.¹⁸

One-on-ones

Schedule regular one-on-ones between bosses and their counterparts, but also formalize relationships between peers. Offer templates, conversation starters and encourage employees to take actions during these sessions to bring structure and progress to these conversations.

Internal Task Forces

Bring specialists together from across the organization to solve pressing problems.

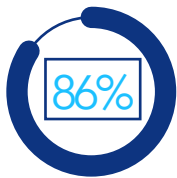


Blood, Sweat & Customer Feedback

Field service is a tough business. Hard-to-reach job sites, heightened customer expectations and hours among hours of driving are just the beginning. And for management, hearing from customers can be brutal. But, there's hope.

When your customer feedback loop is intact, you can start to close the gap on customer complaints. And that's when the sweat equity pays off.

The most important aspect to achieving true field service engagement is improving service over time. In order to improve service, we must have a direct line to customers. We need to know how they think, feel and react to our field service offering.



In a world where 86% of buyers will pay more for a better customer experience, field service organizations stand to win big, or fail hard when it comes to customer perceptions.¹⁹



Customer Feedback Model

Before getting in touch with customers, you should develop a model for how you'll benchmark and improve customer satisfaction. The following 3-step process will work as a formidable starting point for field service organizations who wish to succeed.



Build

Priority number one is creating an exceptional field service experience. Reading this eBook is a great first step! Put some of our principles into practice in the field as a starter, or simply begin re-evaluating how your organization approaches customer service. Often times, implementing new software is a part of the mix.



Measure

Once you have made some distinct changes in your operations, you'll need to track whether or not these are having a positive impact on your overall customer satisfaction. Common benchmarks include a net promoter score, churn rate, new acquisitions, or tracking comments on a self-service portal (or via social media). A full 59% of 25-35 year olds share poor experiences online. Getting a handle on where your customers share frustrations is the first step to resolution.²⁰



Learn

Finally, you need to learn from what you're seeing. Review your key metrics, and seek to incrementally improve experiences and offerings over months, or even years. Rinse and repeat!

Traditional Customer Feedback

Depending on the nature and complexity of your field service operations, gaining customer feedback through traditional means may be your best option. The following are straightforward, tried-and-true methods for gaining valuable input from customers:

Follow Up Calls

Use automated reminders after field service trips to trigger an immediate feedback mechanism. Have customer service staff call and ask basic questions about timeliness, attitude, and overall satisfaction.

Survey Research

Use a list of past customers as a starting point in developing an online, in-person or phone-based study. Ask broader questions about field tech performance, likelihood to work with your organization in the future, and specific service-based functions.

Focus Groups

The purpose of focus groups is to get a qualitative benchmark of how your potential customers will react to specific offerings, ideas, new field service tools or technology. Consider paying to have 8-12 prospect customers get together to discuss the pros and cons of self-service scheduling, or even the functionality of your latest mobile app. The Marketing Research Association reports that nearly 70% of all corporate research spending goes towards focus groups.²¹ This age-old technique can be highly useful, even in our digital age.

Digital and Social Media Customer Feedback

Outside traditional customer data collection methods, there are several digital and social media opportunities for gathering crucial customer data. Some of these methods will be faster and more affordable than traditional data collection. Consider using some of the following:

Self-service Portal

A self-service portal is a website or section of a website dedicated to answering common customer questions. Functionality can range from a simple text-based experience, to offering interactive and real-time chat features. According to a study from Microsoft, 90% of consumers now expect a brand or organization to offer a self-service customer support portal.²²

Social Media

Whether you realize it or not, the vast majority of your customers are using some form of social media. Include hashtags, keywords and reminders for your customers to use their preferred channel to connect with your organization. Often times, you'll be able to resolve, or at least respond to, a frustrated customer before they get angry and abandon your organization.

Email Surveys

If you're using email to send a job confirmation or receipt, consider including a link to a brief online survey about their visit. Getting just 2-3 basic questions answered from each customer would give you enough information over the course of a couple months to make big changes in your service.

Embedded Mobile Experiences

Both your field techs, and your customers are using tablets and smartphones. Consider embedding a feedback loop for both parties into their mobile technology experience. Customers can be prompted to answer questions post-service about the overall experience. Techs likewise can be prompted to "check in" or rate their overall performance, log parts needed, or take notes about a specific job.



CONCLUSION

PUTTING FIELD SERVICE ENGAGEMENT TO WORK

Field service engagement can serve as the connective tissue between technology and customers. It's the human side of field service that stands to reinvigorate trust, care and quality in our increasingly technology-driven industry. Winning service organizations that embrace new technology, develop new models for delivering improved customer experiences, and adapt to changing customer demands in real time, stand to grow exponentially.

Field service engagement is a fundamental shift in thinking – a belief that technology will support improved field service, and customer relationships. This includes:

- Disrupting old service practices
- Unlocking new service customer touchpoints
- Operationalizing the right technology and business practices
- Revising and refining the customer experience over time

Are you ready to change your field service management forever with field service engagement?





ClickSoftware is defining field service engagement, empowering the world's most demanding organizations to optimize the full potential of every service interaction. With ClickSoftware, field service becomes the new competitive lever to drive differentiation and business value. The Click Field Service Edge Platform arms field service leaders with the smartest technologies, a limitless technology-forward platform, and the knowledge gained from a global community of best practices. The result? Do more with less, run your field service business with certainty, and accelerate customer innovation.

Only the Click Optimization Engine offers advanced algorithms and AI technology that transforms field service from the reactive scheduling and managing of tasks to a predictive, highly automated approach that stays one step ahead of customers, field conditions and the competition. Performance metrics and benchmarks allow you to easily operationalize data, and quickly modify the priorities of your field service organization to embrace new business strategies. Together, these capabilities give companies what they need to not only gain important visibility and contain costs, but to engage and delight customers at every step of the service chain.

Exclusively focused on field service since creating the market, ClickSoftware has managed billions of service engagements and is relied upon by nearly a million field service professionals every day. The company is the recognized market and technology leader by analyst firms including Gartner, Forrester and IDC. And, Click is the field service solution of choice for Salesforce, SAP and top systems integrators. More than 350 global enterprises across 20+ industries tap into ClickSoftware for the world's smartest thinking in field service. ClickSoftware. The field service leader.

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