



Service Fusion

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How Field Service Management Helps Grow Your Business

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i n t r o d u c t i o n

How Field Service Management Helps Grow Your Business



Field service management (FSM) and related technologies have revolutionized the way service companies do business, and the way customers experience doing business with them.

So what exactly is FSM, and how can the right solution take your organization to the next level?

What Is Field Service Management and Why Do You Need It?

Leading research and advisory firm, [Gartner](#), defines field service management as follows:



Field service management includes the detection of a field service need (through remote monitoring or other means, inspection or a customer detecting a fault), field technician scheduling and optimization, dispatching, parts information delivery to the field, and process support of field technician interactions.

Service companies can often feel frustrated and overwhelmed by the following challenges and pain points:

- Lack of workflow control and inefficient systems
- Inadequacy of paper or spreadsheet-based systems to track essential analytics effectively and accurately
- Scheduling overlaps
- Mismatched technician skills to job requirements
- Inability to address urgent requests
- Wasteful fuel consumption and increased vehicle wear and tear and incorrect or false mileage reporting
- Invoicing delays that can affect cash flow
- Lack of qualified technicians to meet work order volume

These issues have many business owners focused on prioritizing technology to address inefficiencies and waste in their service delivery process and systems. According to a 2019 global research study on field service practices, Service Strategies Corp. found that 68% of those surveyed plan to [increase investments in field service technology](#). The leaders who

participated in the study also prioritized optimization of existing processes, an increase in staff's technical expertise, and the implementation of new field service management software. An FSM software can directly impact each of these initiatives.

To compete in today's marketplace, you need to carefully consider your company's field service management strategy.

Throughout this eBook, we'll address the three big wins for your business when using field service management software:

1. Time savings and productivity gains
2. Cost savings and return on investment
3. Satisfaction and loyalty from both customers and employees

Let's dig in.

Service Fusion - Dispatch View (seen above)

Time Savings & Productivity Gains with Field Service Management Software

FSM software can improve how both back-office staff and field service technicians spend their time, which in turn affects overall productivity and efficiency. How does FSM help you achieve these wins?

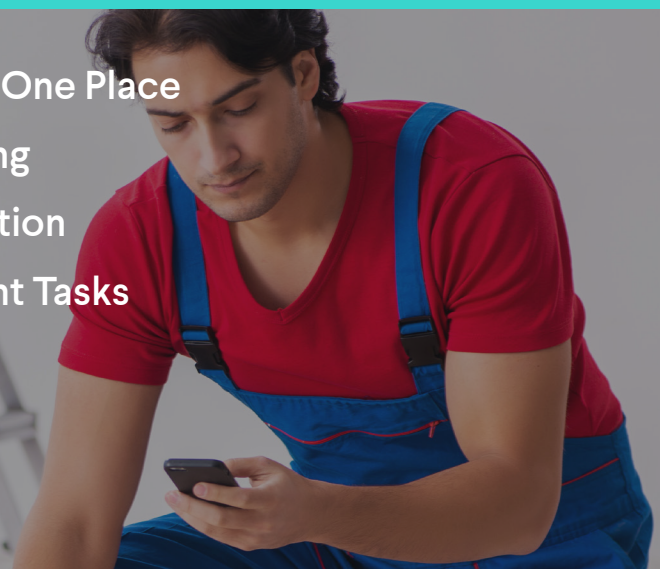
When you manage a field services business, one of the most critical issues is communication flow between the back office and the field. Traditional CRM and ERP solutions do not typically address the specific needs involved with managing field service reps.

With the transparency an FSM software provides, the team at the home office can monitor what's happening in the field in real-time. Managers and customer service reps (CSRs) are much better equipped to provide the kind of support that keeps an operation running smoothly.

Additionally, field service workers can quickly and effectively communicate with the office staff through connected mobile apps. Relaying up-to-the-minute job status and information requests let techs request what they need to get the job done.

Powerful benefits that save time through increased efficiency and improved productivity include:

- All Your Information in One Place
- Field Service Scheduling
- Manual Process Reduction
- Automation of Different Tasks



All Your Information in One Place

Field Technologies Online reported that 52% of companies use manual methods to handle their field service needs. When information isn't centralized, you add a lot of manual work to your team's to-do list. With a mobile-enabled field service management software, details get centralized to reduce wasted time, limit human error, and increase productivity.

With FSM software, your home office team has:

- Real-time scheduling information at their fingertips for job dispatching
- The ability to monitor and replenish inventory as needed
- Access to field techs' notes and job photos

These are just a few examples of the features a robust FSM software brings to your office workers. What about the benefits for the field services reps?

Mobile apps that work with the cloud-based FSM software help techs:

- Receive job and estimate assignments
- Add activity notes, photos, and custom tasks on the fly
- Report job progress
- Quickly find products and parts through image-based catalogs
- Access customer notes and history
- View a map to get driving directions to the customer's location

If your office and field techs have to manage these different items and tasks via paper or Microsoft Office apps, you're wasting valuable time. You're also leaving parts of the workflow process open to human error and potential data loss due to a decentralized method.



52% of companies are using manual methods to handle field service. ~ Field Technologies Online

Field Service Scheduling

We alluded to the benefits of schedule transparency above. However, FSM is about more than merely knowing where your field techs are at any given time. With field service management software, your back office staff can quickly dispatch a technician based on schedule availability and job proximity thanks to mobile GPS or fleet tracking. . Your team can react more quickly than the competition to get jobs done, giving your customers more flexibility, and a better experience.

However, FSM technology can do even more to increase time-savings for your team. Drag-and-drop scheduling reduces the number of keystrokes and mouse clicks your dispatchers and CSRs have to make when assigning jobs. A click here, a keystroke there -- it all adds up to greater efficiency when you look at the savings over time.



Manual Process Reduction

Imagine if your entire process for managing your field service operations lived in a cloud-based software linked to mobile devices and GPS tracking on your fleet. When your operations process goes digital, you reduce paper clutter and the amount of human intervention required.

Technicians and service reps have access to the most up-to-date information. There's no need to manually search for information

in piles of paper or different electronic files and drives online.

Field techs can capture details on their mobile apps and sync with the FSM software. No more recording information twice -- once in the field and again in the system.

Accounting doesn't have to take time to prepare invoices and process payments manually.

Automation of Different Tasks

When you use a field service management software, you'll get the benefit of automation for certain processes that took human intervention to complete before.

- Updates from the field to your accounting system through your FSM
- Communication templates for emails to customers
- Automated workflows for sending messages and reminders to customers

By implementing an FSM and providing adequate training to your team on its use, you could decrease waste and improve service levels.

Cost Savings and Return on Investment for Field Service Management Technology

A motivated, well-trained and efficient staff that delivers excellent service at competitive prices is terrific. What's the cherry on top of that field service sundae? Saving money and realizing a return on investment for FSM software.

So, where can FSM save money and drive revenues?

- Improved Cash Flow
- Fuel Consumption Savings
- Fleet Tracking



Improved Cash Flow

Most FSM systems offer a solution that allows customers to pay the field rep immediately upon completion of a job with the use of a [mobile app](#). This feature tightens the gap between receivables and money in the bank.

When field service management software packages offer mobile payment processing and integrate with accounting software, contractors get paid faster and no receivables fall between the cracks.

Plus, your back office doesn't have to spend time creating and sending invoices days (or

even weeks) after a job completion just to wait 30, 60 or sometimes even 90 days for a customer to pay.

Additionally, they're not spending time creating and sending statements and past-due notices or making awkward and unpleasant collections calls. Instead, they can focus on producing reports to analyze customer trends and identify areas for improvement so you can cut unnecessary costs and grow your business.

Fuel Consumption Savings

Fuel costs are a variable, recurring expense. So it makes sense to use a system for accurately tracking such a high cost of doing business.

When it comes to tracking fuel consumption and costs, some companies choose to rely solely on the word of their employees. Even if you have the most trustworthy employees,

they may accidentally report incorrect numbers.

You could rely on your accounting department to track fuel expenses by driver and keep a lookout for any suspicious numbers. However, that takes them away from far more critical tasks.

A much better way is to use FSM software with GPS capabilities to track and log crucial data. Some software packages offer GPS fleet tracking so that the system automatically identifies and delegates the most efficient routes instead of drivers

having to do it manually (if they even remember to do so). Route optimization automation can save big on travel time and spare you from eye-popping fuel bills each month.

Fleet Tracking

What if your FSM software fully integrated with your hardware GPS tracking devices with no need for service managers or CSRs to toggle between different screens? Moreover, what if that solution had a plug-n-play GPS tracker option? You'd have the opportunity to fully control all of your fleet vehicles without having to rely solely on your field workers' mobile phones.

Plus, a service like this could have a significant impact on insurance premium costs and would likely prevent unauthorized use of company vehicles, limiting wear and tear.

Luckily, there are a few products on the market that do all of that. Some even offer month-to-month service on a reasonable, per vehicle cost basis.

By all measures, a good field service management software solution has the potential to save your company money in a number of ways. If your bottom line doesn't reflect your team's hard work, quality service, and competitive pricing, then it's time to invest in field service management software.



Satisfaction and Loyalty from both Employees and Customers

Using field service management software makes life easier for your back office team as well as for your field service team thanks to features that make scheduling a breeze and bi-directional synchronization with accounting software.

FSM software can help companies:

- Improve employee satisfaction, which in turn, leads to higher productivity and better customer service
- Streamline customer management systems and improve the customer experience

Aside from increasing productivity and efficiency, these features matter because when office and field workers are happy and engaged, they tend to stick around and perform at higher levels. You're not trying to manage a revolving door of employees (and all the hidden costs associated with it), and workflow remains uninterrupted.

What else happens when workers are happy and engaged? [Gallup](#) reports that organizations with engaged employees have earnings-per-share growth that is four times that of their competitors. Companies with more satisfied, more engaged employees also report increased

productivity, higher retention rates, and fewer accidents.

Another benefit of an engaged workforce? Happier, more engaged customers. [A study by ISS](#) revealed that service employee engagement has a high correlation with customer experience. Aberdeen also

found that best-in-class service providers understand the [impact of field service experience on customer satisfaction and retention](#). In other words, happy employees have a significant impact on customer satisfaction.



Organizations and teams with higher employee engagement and lower active disengagement perform at higher levels. For example, organizations that are the best in engaging their employees achieve earnings-per-share growth that is more than four times that of their competitors. “ ~ Gallup

Streamlined Customer Management Systems

A lot of FSM software solutions offer customer management capabilities. Contact information, accounting history, personal communication preferences, billing terms, and referral sources are all stored in one location and accessible with the click of a button.

When you can see everything that’s happening in the field in real-time, you’re in control and in a much better position to understand the customer service levels

and take steps to increase overall customer satisfaction.

Within customer accounts, you can assign multiple service locations and store credit cards on file. Some systems allow you to upload before-and-after job pictures to a customer file and enable you to assign the right technician to the right job.

Current day customers expect frictionless, streamlined experiences. You no longer have time to rifle through paperwork and

manually scour network drives to find the information you need to service a customer properly. They expect -- demand -- prompt service. They don't want to repeat their contact and payment information every time they make a job request. Consider this a result of the [Amazon Effect](#) seeping beyond eCommerce and retail. People want what they want when they want it. They also expect the process to do business with you to be easy and effortless.

And what happens when they don't get the service they expect within the timeframe they expect it? Around a third of them will [consider switching to a competitor after just one bad experience.](#)

The correlation between effective field service management and customer and employee satisfaction is undeniable. And as can be expected, that has a significant impact on revenue and growth.

When It All Comes Together

FSM software can empower field service companies that automate their business-critical processes and workflows. From dispatching and scheduling to integrated communications and GPS fleet tracking and increased remote tech productivity, there are many benefits to investing in field service management software for your company.

If you want to see how you can 1) maximize customer satisfaction and loyalty, 2) reduce paperwork clutter, 3) optimize employee retention and productivity and 4) realize significant business growth with the best field service management software on the market today, then schedule some time for us to show you a [product tour of Service Fusion.](#)

Schedule Your Demo

See for yourself why 3,000+ field service businesses choose Service Fusion to run their business every month.

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