

What's Next in Field Service

The shift from reactive cost center to proactive profit center



Say hello to digitally powered service

There's no denying it; field service has long had a reputation for being slow and disruptive for customers—while being a budget drain for service organizations. But there have been some big changes in recent years. Field service has evolved beyond just installing, maintaining, and fixing products and services. It now offers the opportunity for predictable revenue growth and greater customer lifetime value when digital technologies power it.

Field service technician roles have also changed. When armed with customer data insights, technicians can act as brand ambassadors, delivering highly personalized service that helps customers adopt the right capabilities for their needs. They can also recommend additional products and services during service appointments.

Getting started

Building the groundwork for digital field service involves careful planning. To determine the best approach for taking your field service operation to the next level, it's important to focus on three key areas.

1. **A connected enterprise for effortless customer experiences**

Too often, field service workflows are built and managed outside of core service applications. That means that data from customer support inquiries, service requests, and work orders—along with contract SLAs or entitlements—are stored separately. This disconnected approach has a significant impact on service delivery. It leads to process friction, slower response times, and ultimately an inferior experience that may require far more customer effort.

To combat these issues, many service organizations are investing in solutions that unify customer information and sync IoT connected assets, inventory, order, and process data. This ensures that mobile and call-centers teams have insights across every service touchpoint.

2. **Technology that automates service activities and manual processes**

As older technicians retire from the workforce in mass numbers, finding new talent has become increasingly difficult. One solution is adopting technologies that automate or replace legacy manual processes. For example, utility companies now deploy drones to inspect miles of cabling in hours instead of multiple teams spending days or weeks performing the same task.

Artificial intelligence (AI) and machine learning support remote diagnosis, issue identification, and in some cases, even automated self-healing routines—mitigating the need for in-person service. And advanced self-service capabilities allow customers to quickly triage minor service issues themselves.

These innovative technologies not only improve the customer experience, they also free up field technicians to engage in more complex, higher-value service activities and provide added insight when it's needed most.

3. **A digitally enabled mobile workforce**

How we equip service teams has become a key differentiator in the war for talent. Since 47% of field service companies are still having trouble getting enough quality technicians and drivers to meet business goals,¹ the appeal of new technology has become an effective way to attract talent. When you infuse innovation into modern work processes to empower field service technicians, you create a lasting competitive advantage and foster a culture of happy employees.

Over the past decade or so, the mobile device has become a field service technician's most essential tool. First, it transformed how jobs were scheduled, routed, and tracked. Then it replaced paper-based forms, heavy product manuals, and repair guides with knowledgebase access. As devices became



75%

of field technicians report that products have become more complex and more knowledge, specifically more technical knowledge, is needed to perform their jobs now versus when they started in field service.²

more powerful, service organizations continued to find new and innovative ways to deploy them. Today, with the help of augmented reality, they can enable a technician in Los Angeles to collaborate over video chat with an expert in Boston to pinpoint an issue and mark up the screen where repairs are needed. And that's just one example of how providing modern capabilities to your mobile workforce creates winning experiences for both the customer and field service technicians.

Rising customer expectations

We live in an era where consumers expect in-the-moment personalized service, and your ability to deliver ultimately determines the relationship your customers have with your brand. According to HubSpot research, 93% of customers were more likely to be repeat customers at companies with excellent customer service.³

In search of faster, better experiences, customers readily test new channels and technologies to make their lives easier and their decisions more informed. They also willingly share their data in exchange for personalized service and switch brands when they see something better. For field service, this translates to four areas where digital can help meet customer expectations.

1. Provide the appropriate level of onsite engagement

In the past, customers expected onsite service visits, but recent global events demonstrated the need for remote service, and field service organizations quickly rose to the occasion to minimize disruptions. Today, newly equipped virtual organizations are ready to provide remote support at scale. Customers not only accept this approach, but many also prefer it for some break/fix and maintenance services.

2. Reduce product complexity when things go wrong

As products have become more connected and technically sophisticated, they've also become more difficult for mobile technicians to service. Customers no longer want to try to determine what the problem is. They expect the service provider to either come and fix the issue after being called or prevent downtime proactively. In both cases, digitally equipped mobile workers can leverage device data and insights to resolve issues and quickly communicate status updates to customers.

3. Understand customer needs onsite and provide appropriate offers

Digital technologies offer the opportunity to serve customers with new business models like product-as-a-service. When you give service agents and field technicians the tools, offers, and incentives to sell at every customer touchpoint; it doesn't just benefit the company, it also helps the customer because the offers are personalized to meet their needs.

4. Enhanced transparency, communication, and self-service

Connect your people, processes, and customers with digital field service that helps you maximize workforce productivity and deliver an exceptional service experience. A connected platform also lets you deflect lower-value inquiries to automated channels for self-service and route more complex situations to service agents or field technicians. For customers who need

75%

of consumers don't like the idea of having field technicians in their homes unless absolutely necessary.⁴

quick answers, insights from the data across your front and back-office applications can also fuel the deployment of guided help via intuitive knowledge assets for both employees and customers.



The digital mobile technician

Today's newest skilled workers are digital natives who've had very little—or even no experience—with manual or paper-based processes. These employees expect work applications to be as intuitive and easy to use as the ones they use in their personal lives. From a tactical perspective, five strategies can help you meet their expectations as you shift field service operations from a cost center to a profit center.

1. Optimize service scheduling using AI

Your customers expect a well-orchestrated field service experience, and that starts with how you schedule onsite service appointments. Using AI, field service leaders can optimize the process using machine learning and predictive AI to automatically assign and route field service workers based on various parameters, including SLA, technician skill set, location, availability, individual performance patterns, product knowledge, and more.

2. Connect your mobile workforce

For mobile workers, digitally powered service offers a better way to communicate and innovate. Collaboration tools help disseminate information and insights by connecting your employees with each other on a one-to-one and one-to-many basis. Examples include text and video chat, internal messaging software, self-service portals and workflows, community forums, and augmented reality (AR) remote collaboration.

3. Connect the field and back office

Think about how much time is lost when a mobile worker doesn't have parts or inventory information when they're onsite with a customer. Transform

89%

of customers want to see modern, on-demand technology applied to their technician scheduling, and nearly as many customers would be willing to pay a premium for it.⁵

and modernize your business by connecting field technicians to your back-office applications. When they have immediate access to parts, inventory, supply chain, invoicing, and other pertinent information, it not only saves time and money, it allows your teams to make instant decisions driven by data.

4. **Scale complex scheduling and training requirements**

Efficient scheduling is the key to maintaining healthy service margins, but it can be challenging. Service team members have varying skills and experience, so they don't all complete tasks in the same amount of time, and unplanned events can require scheduling flexibility. With AI-assisted scheduling and routing, you can match customer requirements with technician experience, maximize route efficiencies, and manage emergency exceptions to avoid impacting other technicians or customer schedules.

5. **Enable your mobile workers to advise and sell**

Renewals and expanded sales (cross-selling/upselling) have become a significant part of company revenue. But driving customer adoption of new products and services requires a deep understanding of customers. That's where your field technicians come in. Not only do they have the technical knowledge needed for product recommendations, but they're also seen as "trusted advisors" based on their track record of customer service. Equip them with the right data and digital tools to advise and sell.



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Connected field service

The benefits of connected devices are far-reaching for both businesses and consumers. Customers appreciate being able to access information and control devices remotely, while companies can also use the data to prevent breakdowns and monitor equipment. Most field service organizations cite anticipating vulnerabilities (54%) and driving customer satisfaction (53%) as real accomplishments for their company thanks to the use of connected devices.⁶ With connected field service, you'll be able to retain and grow customer lifetime value by including these key business strategies and objectives:

- **Ability to deliver proactive, predictive, and preventative field service**

Today, millions of connected devices provide valuable data that helps predict when field service assistance will be needed and diagnose problems before customers even realize there is one. This trend is fueling a new type of service interaction that resets the bar for customer experience in field service.

- **Using machine learning and artificial intelligence**

Machine learning uses statistics to optimize processes. It's a vital component of the new generation of routing and scheduling capabilities that use AI to improve service. It also aids other aspects of field service, such as providing relevant data to chatbots for more personalized service and prescriptive guidance to field technicians for repairs.

- **Mobility via digital technology**

Field service has always been mobile to some degree. But what has changed is the proliferation of customer mobile devices and the data that field service technicians can leverage. When coupled correctly, field service organizations can deliver a dramatically improved customer experience.

- **Contactless and remote service**

Although the concept of remote service is not new, the global pandemic created an urgent need to deliver field service without in-person contact. Since then, both B2B and B2C customers have grown accustomed to this type of service, and many actually prefer it.

Conclusion

As digital capabilities continue to improve customer interactions, it's up to organizations to keep up or risk falling behind competitors. Continued success starts by putting the customer at the center of your service by meeting and exceeding their needs at every moment. Achieving that level of engagement requires more efficient and automated processes while still maintaining a human touch. It requires a deeper relationship with customers that digital can facilitate while evolving with their changing expectations.

52%

of mid-market leaders cited digital as either important or extremely important, while only

46%

say their company has a digital roadmap built into their strategy.⁷

Takeaways

1. Digital is transforming all aspects of field service from routing and scheduling to training and to how you deliver field service. It provides a framework of efficiencies you can leverage to remain competitive while keeping your customers happy.
2. The old break-fix model of waiting for customers to call you when things break is gradually being replaced by a new business model. With the proliferation of connected devices and their data, customer expectations will continue to shift from reactive to proactive and predictive service.
3. When it comes to creating an exceptional field service experience, digital is a pathway to success. You'll increase both customer satisfaction and loyalty by making it easier to get help and keep products and services running smoothly.
4. The new generation of employees and mobile workers expect modern technology that helps them do their job better—not slow them down. Aim to adopt field service knowledge and collaboration tools that are easy to use in the office and out in the field.
5. The right technology can automate processes to help customers get information and resolve issues faster. It also frees up your team to work on more complex and high-value service engagements.



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