

FIELD SERVICE KNOWLEDGE MANAGEMENT: THE LINK BETWEEN SERVICE EXCELLENCE AND EFFICIENCY

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Report Highlights

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The need for knowledge management tools is a top challenge facing even the Best-in-Class due to an aging workforce and a lack of visibility into the value of service.

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Organizations that leverage knowledge management tools for service have been able to outperform their peers in key metrics such as customer retention, SLA compliance, and first-time fix.

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Knowledge management users are able to provide a real-time data flow from the field to the back office.

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Through the use of knowledge management capabilities, sales and marketing teams are able to stay up to date with current and future service offerings, as well as the value being delivered.

Service excellence demands that the entire team work together to deliver value to the end customer. This combined effort depends on the entire team having a real-time view into the realities in the field. This report will highlight the impact of knowledge management tools on helping organizations achieve their customer service goals in field service.

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The ability to quickly diagnose a problem, find the answer, and resolve the issue on a first visit has never been more integral to the success of service organizations.

For the purposes of this research, Aberdeen makes the following definition:

Knowledge management: a centralized repository (online portal or content management system) enabling organizations to identify, capture, access, and share numerous types of content (e.g. documents, images, videos and service visit history).

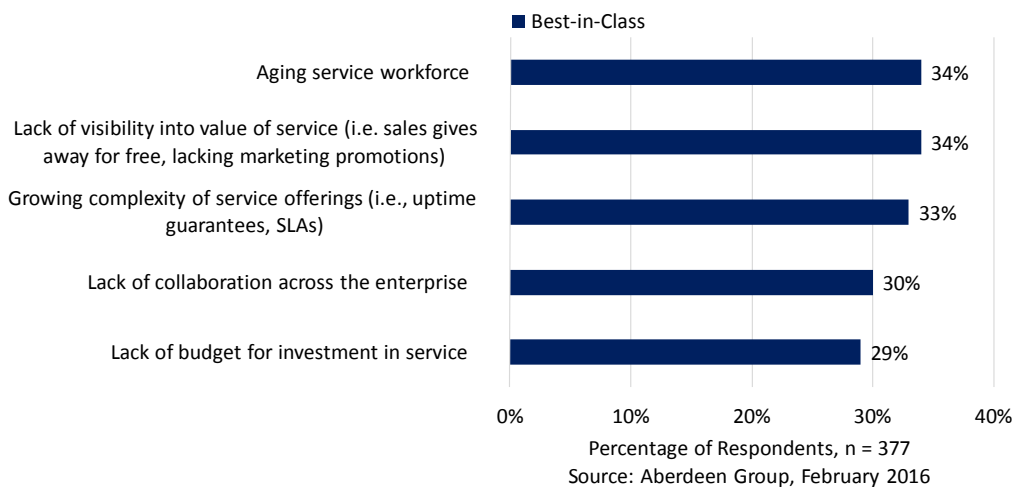
No longer is it good enough to meet a service window or a scheduled service appointment. In this era of the empowered customer and competition, service must exceed expectations and deliver value in every interaction. And in order to meet those heightened expectations, service organizations must ensure the entire team, not just the field, has access to the right insights in real time to make strategic decisions to deliver value to the customer. Aberdeen Group's recent report, [*Knowledge Management for an Integrated Service Experience*](#) (December 2015), highlighted that savvy service organizations are 65% more likely to regularly assess the effectiveness of knowledgebase articles and 22% more likely to connect field technicians to remote experts to share knowledge. The ability to quickly diagnose a problem, find the right answer, and resolve the issue on a first visit has never been more integral to the success of service organizations.

Knowledge Management is Power to the Field

There is a convergence of forces coming together that make knowledge management more than just a nice thing to have (Figure 1).

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Figure 1: Challenges That Drive a Need for Improved Knowledge Management



Knowledge management is not solely about storing data off in a data warehouse. Insights need to be accessible, accurate, AND relevant to the team — not just a chosen few. The success and growth of the service organization depends on its ability to retain the knowledge of an experienced workforce while being able to invest in the tools and capabilities that bring the entire organization together. Delivering excellent levels of service demands that the entire organization work together to solve customer issues. The field team is just one part of the equation. But too often, they are expected to act as a team of one with minimal collaboration between other functions of the business.

Get the Right Answers to the Right People in Time

Service knowledge management tools such as a centralized knowledgebase provide a real-time view into the interactions between a technician and a customer or piece of equipment.

➔ [Read the full report, “Knowledge Management for an Integrated Service Experience”](#)

The State of Service Management Best-in-Class Defined

In the January and February 2016 State of Service Management study, Aberdeen used three KPIs to distinguish the Best-in-Class (top 20% of aggregate performers) from the Industry Average (middle 50%) and Laggards (bottom 30%) organizations, with the mean performance amongst the Best-in-Class as follows:

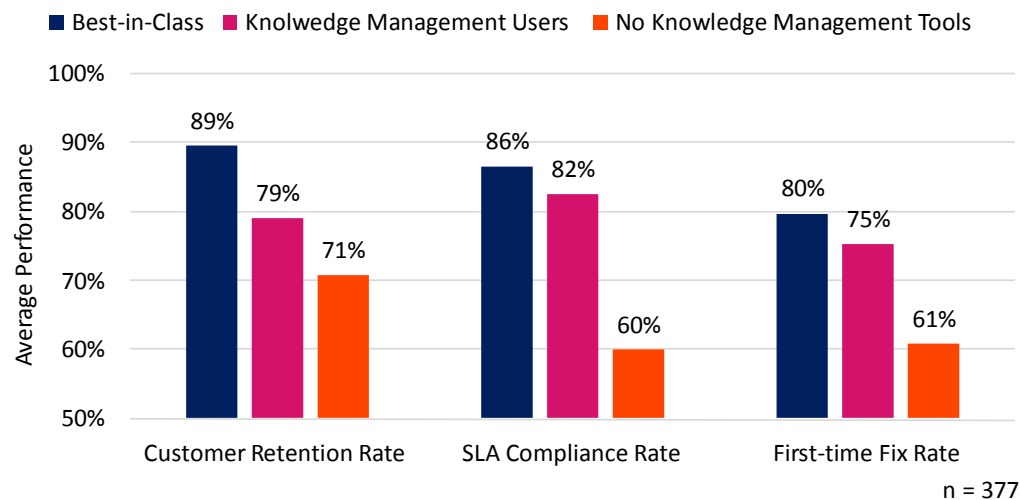
- 86% performance in SLA compliance
- 89% performance in customer retention
- 7% annual improvement in worker productivity

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There is no magic bullet to success, but the top performing service organizations help the entire team find the right answers to customer issues and ensure action can be triggered in real time to solve problems.

Without these tools, once a machine leaves the factory floor most interactions with it will be reactive in nature. For example, engineering will only see that machine again if there is a major defect. Marketing will only find out about it if a customer satisfaction survey comes back negatively. Sales won't know there was a problem until their calls for a new machine purchase go unanswered. This is why it is integral that the field team is able to connect their daily interactions with the customer to a knowledgebase which can give the entire team a real-time view into the whole story.

Figure 2: Metrics Achieved as a Result of Better Knowledge Management



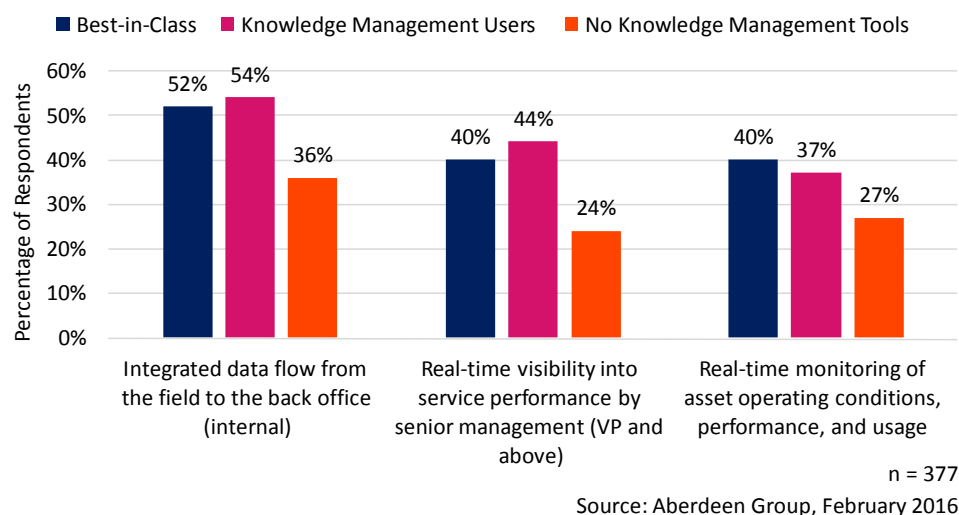
Source: Aberdeen Group, February 2016

Figure 2 above highlights how organizations that leverage knowledge management tools are able to not only meet customer SLAs but also fix more issues the first time AND retain their customers. There is no magic bullet to success, but top performing service organizations help the entire team find the right answers to customer issues and ensure action can be triggered in real-time to solve problems.

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Best-in-Class Roadmap

As technology continues to advance in both processing speeds and storage capabilities, there is no excuse for maintaining the status quo when so much is on the line. As seen in Aberdeen Group's *Field Service Workforce Management 2015: Empower Tech 3.0* research (May 2015), top performing organizations prioritized investment in mobile tools to increase the access and availability of service knowledge both for the field team and for the rest of the organization. This connection to data and insight provides a level of visibility to not only know what is going on, but also to be able to proactively act on the information in real time. The Best-in-Class don't stop at just monitoring the field, they create an environment through knowledge management tools to be able to have a conversation between the field, the back office, and service leadership (Figure 3).

Figure 3: Real-time is the Right Time

➔ [Read the full report, “Field Service Workforce Management 2015: Empower Tech 3.0”](#)

Additional metrics:

Though not used to determine the Best-in-Class, these metrics further highlight the outperformance of the Best-in-Class and those leveraging Knowledge Management tools as compared to organizations not leveraging Knowledge Management tools.

Total annual service / maintenance issues resolved remotely

- Best-in-Class: 39%
- KM Users: 40%
- Non-KM Users: 30%

Serviceable asset uptime

- Best-in-Class: 84%
- KM Users: 84%
- Non-KM Users: 69%

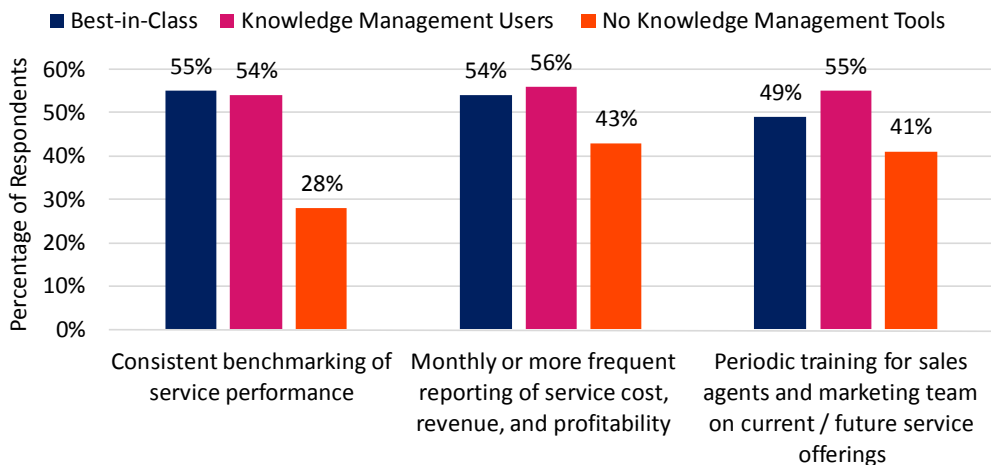
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Without knowledge management capabilities, each team is looking at a static photograph as opposed to a real-time video feed that can be interacted with. This gulf between these two states is not a trivial one. What happens if the sales organization doesn't know prior to a sales call for a renewal that the customer has had three failures in the past week which led to a dramatic loss in productivity? What happens if engineering doesn't uncover a major defect in a machine as they start building the prototype for the next revision? What is the impact to margins if service leadership can't assess the real-time performance of underperforming service workers?

→ [Related Research](#)
“Service Culture in 2015: Creating an Environment of the Customer”

Knowledge management tools help the entire team become service workers with the opportunity to positively impact the customer relationship. Aberdeen Group's [Service Culture in 2015: Creating an Environment of the Customer](#) report (June 2015) highlighted that too many organizations still collaborate infrequently at best. Knowledge management tools not only provide a real-time view into the field service operation, they also enable reporting for best practice sharing and continuous improvement (Figure 4).

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Figure 4: Report The Value Being Delivered in the Field

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Source: Aberdeen Group, February 2016

As noted earlier, customer expectations continue to rise, competition attempts to take a bigger share, and technology tools evolve. In an ever more complex service environment, knowledge management tools enable the service organization to capture insight into how assets, the service team, service offerings, and the customer are performing, providing the opportunity for continuous improvement.

Build on the Knowledge in the Field

The definition of service excellence continues to evolve. Not so long ago, meeting an SLA, showing up on time, or turning more wrenches than the competition was all a service organization needed to do to achieve excellence. This new era of service has placed different demands on the organization: how can the field have the right information, the right parts, and the right skills to deliver the appropriate service for a particular customer

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engagement? In order to excel at service while also operating efficiently, top performing organizations have followed these best practices:

- **Capture insights in the field in real time.** Knowledge management tools help service turn from reactive to proactive. Instead of waiting for paper forms to be logged, or spreadsheets to be updated, knowledge management tools enable real-time access to data and the accurate dissemination of insights.
- **Make real-time insights available to the field team and back office.** The convergence of mobile tools, centralized databases, and empowered field workers has transformed service to capture and make accessible the interactions that are occurring between the technician, the customer, and the assets.
- **Communicate value to the team through access to intelligence.** Sharing best practices helps turn tribal knowledge and silos into a community. The inevitable transformation of the workforce demands that service leaders contain valuable experience and ensure it can be leveraged in future customer interactions, regardless of the tenure of the worker or the department they reside in.
- **Maintain accuracy through a connected data flow.** Knowledge management technology capabilities help remove much of the uncertainty and chance of errors impacting the service organization. Knowledge tools can be enabled to format responses and thus take the guesswork out of the transfer of data and the customer interaction story. The cost of not getting this right isn't only a delay in service resolution, it could be a lost customer.

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For more information on this or other research topics, please visit www.aberdeen.com.

Related Research

[David vs. Goliath: Can an SMB Field Service Team Defeat Major Service Issues](#); January 2016

[Knowledge Management for an Integrated Service Experience](#); December 2015

[Service Culture in 2015: Creating an Environment of the Customer](#); June 2015

[Field Service Workforce Management: Empower Tech 3.0](#); May 2015

[State of Service Management 2015: Connect to Your Customers](#); March 2015

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