



expandit

# Why do you need Field Service Management Software?

- the basics you need to know

Demystifies everything from  
seamless scheduling to service optimization

# SAVE TIME, SAVE MONEY, AND GROW YOUR BUSINESS WITH MORE EFFECTIVE FIELD SERVICE MANAGEMENT SOFTWARE

If you are looking for better ways to manage your company's field workers but aren't sure where to start - this guide is for you.

It provides insights into the challenges around field service management and the ways digital software can help to tackle them - creating smarter, safer and more efficient businesses.

The aim is to tackle the issues that field service management software solve and the expected benefits from utilizing them, providing examples of Field Service Management challenges to consider, and many others.

Implementing the right field service management software is more important than ever - we share our knowledge on these pages with the hope of putting you on the path to field service success.







# WHAT IS FIELD SERVICE MANAGEMENT ?

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Field service management is the process of coordinating all of the operations conducted by a field service organization, such as planning service, dispatching operatives, tracking job status, invoicing, and billing.

Field Service Management software refers to any kind of software that is used to handle the management of resources. It is a tool used by companies, who want to organize their business and employees and at the same time provide the best customer service.

Typically, the objective is to ensure that the company stays on top of service jobs and that the right employees are dispatched to the right jobs. To do so, it streamlines and automates key processes or tasks involved in managing field workers and services.

It covers all of the tasks, responsibilities and activities that are involved in managing these operations - from job scheduling and dispatching to compliance and back-office administration.

In addition, you need to meet customer expectations, keep track of employee productivity, manage work orders, store service history and make sure your planning system is always up to date. Outdated processes and different systems can lead to a lack of information, lost time and frustrated customers.

Field service software solves this challenge by connecting the right data in the right places and providing features that help you go from reactive service to proactive.



# WHO IS USING IT?

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Field Service Management software is often implemented by companies that handle installations, repairs, maintenance and services of equipment or systems.

These include businesses within a wide variety of different industry sectors. A few examples could include:

- HVAC
- Construction, renewable energy and professional services
- Property and facility maintenance
- Engineering - on-site inspections, maintenance and repair
- Highways - road maintenance and repairs
- Telecommunications - installation and repair of cabling
- Utilities - maintenance and repair of infrastructure

## **...OR IN OTHER WORDS**

...if you go into the field / leave the office, you should be using a field service management software.

# TYPES OF FIELD SERVICE

Field service management software can be split into the services that they are intended to work with. Whether it is corrective, preventative, or proactive, equipment maintenance needs to be handled.



## Installation

Once a customer purchases equipment, they will need it installed within their operating environment by experts. A field worker will ensure that it is correctly installed and fully operational from the start, setting a baseline and the standard for the future operation.

## Maintenance

Maintaining equipment is labor intensive. Since repair time is expensive and the time to respond to an incident can result in excessive downtime, it's best to conduct pre-planned activities in order to maintain the equipment before it breaks. Examples of this include inspection and replacing worn parts before they completely fail.

## 3 typical categories of field services maintenance activities

**Corrective:** If a product breaks, a field service worker is dispatched to the customer location to repair it. Additionally, if a machine is not working as intended, it may require calibration. Both repair and calibration are different types of "corrective" maintenance.

**Preventive:** Preventive maintenance is the scheduled maintenance of equipment and assets in order to keep them running, improve performance and prevent any costly unplanned downtime from unexpected equipment failure.

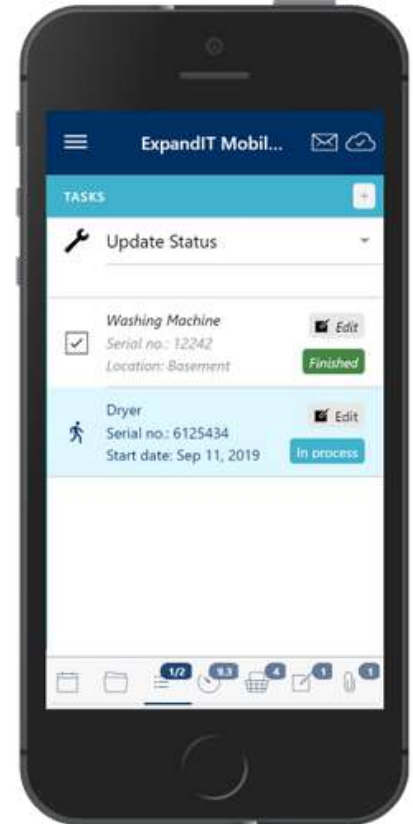
**Proactive:** Proactive maintenance is all kinds of maintenance that is done before any significant breakdowns or failures occur. The aim is to reduce unplanned downtime, equipment failure, and risks associated with operating faulty equipment.

# BENEFITS OF FIELD SERVICE MANAGEMENT SOFTWARE

Businesses that incorporate field service management software in their workflow can increase their productivity in terms of jobs completed each day significantly.

Field service management software can simplify your processes and improve the efficiency of your business in many ways. The main benefits of using a field service management software are described here:

- **Efficient scheduling**
- **Optimized routing**
- **Real-time resource location monitoring**
- **Access to information - online/offline**
- **User accessibility**
- **Faster invoicing**
- **First-time fix rate**
- **Paperless method**
- **Enhanced customer satisfaction**
- **Comprehensive analytics**





# ARE YOU TRYING TO JUGGLE WHERE YOUR TEAM SHOULD BE OR ARE EXPECTED TO BE?

## 1. EFFICIENT SCHEDULING

Field service personnel are often decentralized, with the workers out in the field. This makes manual scheduling inefficient and cumbersome, even erroneous at times. Field Service Management tools are equipped with smart scheduling features to fix this. These identify the position of each worker and the task may be assigned to the nearest worker with the right skill set. This saves companies time and effort and furthermore eliminate overlapping and duplicated tasks. Managers also acquire better visibility of the job progress of their field workers.

## 2. OPTIMIZED ROUTING

For field service workers, long travel times are common. Field service software can significantly lower the time field workers spend on the road. By assigning an optimal route for a field worker to follow, the result is immediate, shorter travel times meaning more jobs can be completed in a day while also cutting down on fuel expenditure as well.

## 3. REAL-TIME RESOURCE LOCATION MONITORING

Field Service Management helps you monitor and identify resources in the field in real time. Track tools, equipment and vehicles and log the use of different items. For field Service Management companies, it's imperative that their field workers are able to access their designated schedules while away from the office.

Field Service Management software allows operations managers to monitor all the field workers' real-time location. It's easier and faster to allocate work orders and manage tasks on a day-to-day basis.





#### **4. ACCESS TO INFORMATION - ONLINE & OFFLINE**

Insufficient information about a task on hand can lead to repeated calls to the office. This is a crucial aspect that Field Service Management software addresses. With the right software you can accurately record and relay job info such as parts required, historical details and time spent. This results in reduced time that field workers spend in sourcing the needed parts and information. It can also increase the first time fix rates for customers since the right materials for the job are brought properly.

#### **5. USER ACCESSIBILITY**

The software should provide accessible formats with alternative means of presenting information for people, who are unable to access it in its original written format. Examples of accessible formats include audio, print, and digital text conforming with accessibility standards. Lighthouse is one of several automated tools for testing accessibility.

#### **6. FASTER, MORE ACCURATE INVOICING**

If your company is still using paper-based quotes and invoicing, payment cycles will likely run longer than you would like. It might take multiple weeks to assess the work performed once all the data has been captured and analyzed manually. As a result, the payment cycle takes considerably longer than anticipated.

With Field Service Management software, however, field workers can quickly send every job detail from the field. This includes used materials and parts, signatures of customers, forms, time spent on the task, and pictures of the job result.

Many companies see their invoicing cycle reduced by 30 days or more with a Field Service Management solution. This translates into better, more consistent cash flow for the company.



## **7. First-time fix rate**

First-time fixes can directly affect how customers feel about the service of the companies. If a problem is not solved during the first visit customers can become frustrated. This is often due to the lack of spare parts and expertise. Aside from that, the business itself stands to suffer financial losses due to additional scheduling, more fuel usage, late penalties, and more.

With smart scheduling capability in Field Service Software, the right specialist with the right competences is put to the job. Inventory management ensures that spare parts will be available. Problems can also be communicated a lot more clearly and it guarantees that the field workers are bringing the right equipment for the job.

## **8. Paperless method**

Manual transfer of information is prone to errors and duplicate entries. To prevent such troublesome situations, Field Service Management software features automated capabilities to eliminate errors from masses of paper-based works. The software effectively prevents duplicate entries and data loss. It also provides real-time analytics to help dispatch paperwork efficiently.

## **9. Enhanced customer satisfaction**

Customer satisfaction is the major defining success factor in field services. Field Service Management software can enhance customer satisfaction in many ways. With route optimization, mobile access to information, and sending the most suited resource for the job, field workers render and complete services faster. Furthermore the ability to send SMS, e-mails and mails at key stages of a service order ensures that the field operative and the customer are in sync. This also increases the engagement between field operatives and customers.

## **10. Comprehensive analytics**

One important aspect of growing a business is understanding how it is faring. Knowing the weaknesses and potential issues allows a company to know where to properly direct the efforts.

Businesses can get access to important data such as average repair times, completion of a service call, the number of daily scheduled and completed jobs, return visits, idle times, and more. This information also provides them with opportunities for increasing their efficiency.



# FACTORS TO CONSIDER WHEN BUYING FIELD SERVICE MANAGEMENT SOFTWARE

The most expensive Field Service Management software does not always translate to being the best for any business. In the same way, the cheapest does not always mean a good deal.

Before actually purchasing the software, here are some of the factors to consider:

**1. Cost-efficiency** - Many factors affect the cost-efficiency of a product. These include field workers, business needs, number of users, deployment type, and system customization. You also have to consider other expenses outside the subscription fee. These include implementation cost, training cost and technical support.

**2. Deployment - cloud, on-premise or as a hybrid of the two options?** Companies looking for mobility will look for cloud-hosted solutions. Those that need their system to be more secure and safe from outside access should choose on-premise software. A hybrid system is ideal for businesses that are not sure yet which deployment option is better for them. In order to ascertain which deployment option to choose, you also need to look at the long-term cost of ownership. Add in customizations, data access, and how it integrates with existing software like the ERP system.

**3. Scalability** - Consider adaptability to changing needs when selecting software. Even if you are under a budget constraint, it is still a good idea to look into plans that are pricier than what you can afford for now. This way, you can opt for those plans in the future when your needs expand.



**4. User-friendliness** - Service professionals need to easily access information about the job at hand and their schedules. Since field workers and admins use the system, you must go for an intuitive and easy-to-use interface.

**5. Integration** - By choosing to integrate your Field Service Management software with other systems, you can make it easier for the dispatchers to streamline the workers' workflows. ExpandIT integrates with Microsoft Dynamics ERP systems. This means that data can be retrieved as required, enabling dispatchers and field operatives to prepare more effectively for a service visit.

**6. Mobility** - Flexibility and mobility in field service management tools easily increases the productivity and efficiency of field workers. These allow them to instantaneously complete paperwork and provide real-time updates and queries. ExpandIT connects field workers with the information they need to work anywhere, even offline!





# COMPLIANCE AND TRANSPARENCY



## It's all about having the right tools

As a business leader, it is your responsibility to ensure that work is documented, operations are compliant, procedures are followed and your workers are safe.

Field workers have a lot on their mind, the least of which is often paperwork. With multiple jobs a day and field workers working in different locations, it can be a challenge to get paperwork handled and managed. Field workers are focused on delivering exceptional customer service and should not be burdened by cumbersome paperwork.

Field Service Software keeps track of the paperwork so that all important documentation and signatures is all in one place. With ExpandIT, the field workers do not need to worry about gathering paperwork before leaving the job site but can instead collect information digitally on their mobile device.

It can be tricky to maintain compliance if you don't have the right tools or complete visibility over your operations. Field Service Software gives your field workers the tools needed to practice transparency. Signatures and photos can be captured before/after so all the work is fully documented, emailed to customers and included on invoices. Full history is maintained so documents can be referred to.

Everyone — including the field worker, the customer, and the back-office — can have an up-to-date service history. Not only does this improve transparency and build trust with the customer but it can also help you respond quickly and cost-effectively to audits when needed.

# Compliance tools

1

## 1. Detailed Checklists

There should be no confusion about what to do. Field Operatives need detailed checklists that systematically walk through each step in the compliance procedures. Instead of having to figure out the right way, they simply follow along.

2

## 2. Digital Forms

Paperwork can get lost or destroyed. Digital forms are easier to access, faster to fill out, and the data goes automatically into a comprehensive database that can be audited later to prove compliance.

3

## 3. Mobile Accessibility

Important instructions should be front and center. Making compliance checklists and digital forms accessible through mobile devices gives access to this vital information anywhere on a job site.

4

## 4. Full Automation

Compliance and safety leaves nothing to chance. Instead of counting on field workers to follow the proper procedures, automate those procedures wherever possible so that the correct steps happen automatically.

5

## 5. Mandatory workflows for field workers

Certain forms are required to be completed by field workers before they enter sites for example risk assessments and method statements. These forms can be set as mandatory in ExpandIT, meaning field workers can only complete the job once these have been filled out. Mandatory forms can walk field workers through the steps required for a procedure, noting when to obtain necessary signatures and readings that could otherwise be forgotten during a complicated deployment.

6

## 6. Manage customer information

Imagine if all your documentation is paper-based, you have to find somewhere to store it and potentially hire staff to manage the filing system. When completing a job, field workers can be prompted to ask customers for a signature on their mobile device. Getting sign off from your customers is important information and helps your business remain compliant by proving that the work has been accepted by the customer.

7

## 7. All your data in one, secure location

With ExpandIT, any documents, paperwork, forms, or certificates are stored. This means for instance that, if your business is being audited, you can access all the relevant information immediately.

# FIELD SERVICE IN NUMBERS



**48%**

of service and installation companies use a field service management system.

**52%**

of service and installation companies still use manual processes.

**Did you know**

**54%**

OF FIELD WORKERS SAY THAT THEIR TOP CHALLENGE IS PRE-VISIT REVIEW OF JOB HISTORY.

**Other challenges:**



Visibility of spare inventory



Access to historical data



Tracking travel time & work time

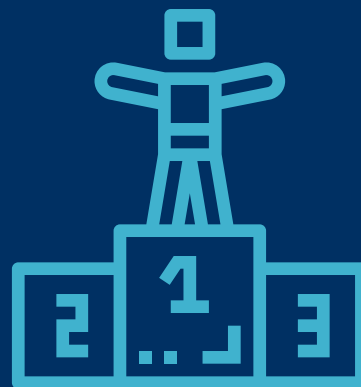
## FIELD SERVICE MANAGEMENT SOFTWARE SOLVES THESE CHALLENGES

**Did you know**

**80%**

of service and installation companies say mobile field service is required to improve efficiency and speed of personnel.

Implementing a field service management solution will not only help you stay competitive but improve customer satisfaction.







## THE KEY TAKE AWAY

The technological landscape is developing rapidly and only paves the way for new challenges. Field Service Management software is no longer an optional add-on but a must-have tool for you to thrive in a highly competitive market.

**Perhaps it's time to automate your field service business?** Are Field Service Management challenges holding your business back? Do you know how to optimize according to the company's real needs?

ExpandIT is a SaaS solution that is available to your entire workforce from any location, at any time, on any device. Whether you are on a tablet in an airport, in the back office, or in the field, ExpandIT gives you access to your entire business. ExpandIT provide a solution for real-time data access and mobile technology that makes it possible to improve field services and customer satisfaction.

You know the pain points that you want to fix by adding a field service solution better than anyone. Make sure you get the solution that not only solves those problems but has the ability to grow with your operation. Avoid getting a system that works for now but will become obsolete in the future.

**If any of the field service management challenges in this guide look familiar, it is time to contact: [sales@expandit.com](mailto:sales@expandit.com)**



**A FIELD SERVICE MANAGEMENT  
SOFTWARE WILL HELP YOUR BUSINESS:**

- ✓ **EMPOWER YOUR MOBILE WORKFORCE**
- ✓ **STREAMLINE PROCESSES**
- ✓ **IMPROVE COMMUNICATION**
- ✓ **AUTOMATE TASKS**

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