

# WHY SERVICE MANAGEMENT COMPANIES ARE LOSING MONEY

AND HOW YOU CAN FIX IT



**MANUAL  
PROCESSES**

**RESOURCE  
OPTIMIZATION**

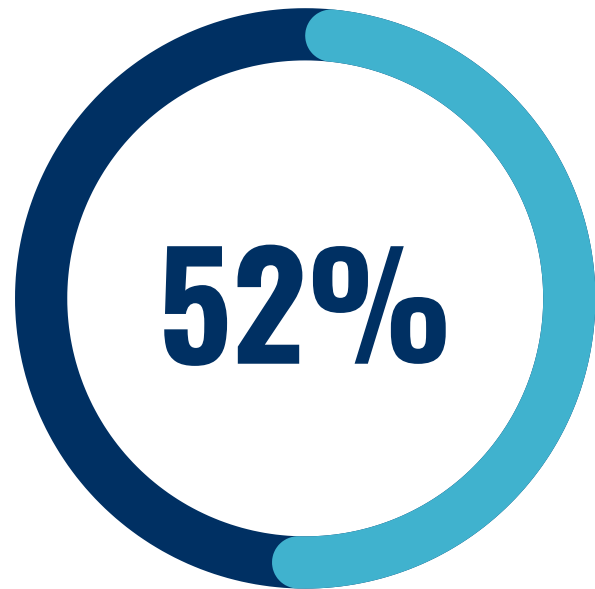
**FIX RATES**

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# MANUAL PROCESSES

Your service orders are on sheets of paper, your customer information is in a Rolodex or maybe a CRM system in the office, your field technicians pop by the office once a week to drop off paperwork. Sound familiar? Running a service business, or really any business, means juggling a lot of tasks and ensuring you stay on top of them.

**Time is money and manual processes eat up tons of time and have a significant impact on your profit margins.**



**of service organizations still use manual methods for field service**

Field service management software can help you eliminate many of the manual processes in your business. It connects your field technicians with your office staff and also with your customers. Information is easily shared and updated in real-time.

Paper is eliminated by using electronic reports that cannot be misplaced, ripped, or rained on. Signatures and paperwork are not forgotten by making them a mandatory part of the service process.

Report: NA Test Report

Checkbox Test

did you check the pump?  Yes  No

Did you check the pump?  Yes  No

Is it safe to use?  Yes  No  Not Relevant

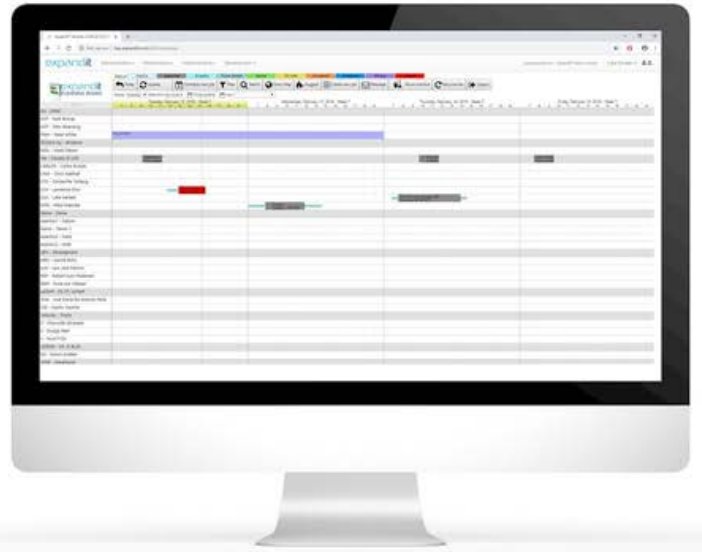
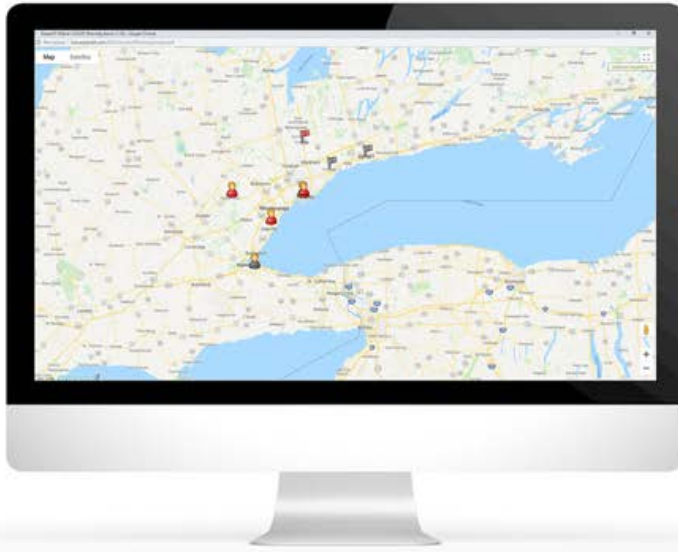
Did you change the oil?  Yes  No

Comments Filled out form

Image

Sign Here

OK



# 25% OF FIELD SERVICE ORGANIZATIONS ARE STILL USING SPREADSHEETS FOR JOB SCHEDULING

(Verizon Connect Research)

## SCHEDULING

Getting the right person to the right job with the right tools at the right time is critical to your business. Verizon Connect research found 25% of field service organizations are still using spreadsheets for job scheduling, while the rest still use whiteboards and other manual methods. This manual approach to scheduling makes it difficult to react to changes or quickly make adjustments.

Field service management software empowers dispatchers to make smart decisions, by providing them with all of the information they need in one place.

It enables dispatchers to easily adjust plans as information changes or updates are made. Updates and changes can be communicated quickly and easily with field technicians and customers using the software.

Data can be retrieved as required, enabling service technicians to prepare more effectively for a service visit and increase first time fix rates. They can view all jobs scheduled for any given day, week, or month. For individual jobs the service technician can see the scheduled time, location, planned material and messages from the dispatcher. The service technician can record time against the job and add materials and attachments.



**"BEST-IN-CLASS" FIELD  
SERVICE ORGANIZATIONS  
RESOLVE THE ISSUE ON THE  
FIRST VISIT 88 PERCENT OF  
THE TIME, "AVERAGE"  
COMPANIES ACHIEVE AN 80  
PERCENT RATE AND THE  
"LAGGARDS" STRUGGLE AT 63  
PERCENT.**

**ABERDEEN GROUP**

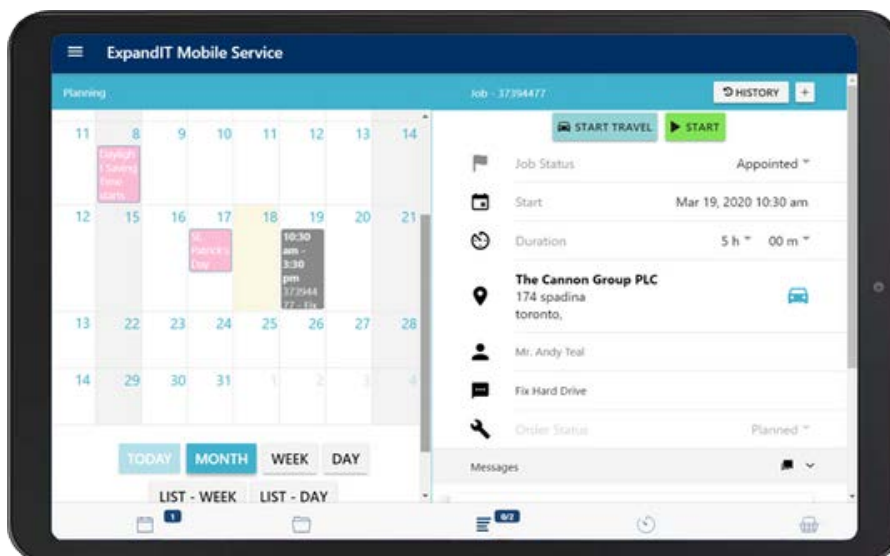
# FIRST TIME FIX RATES



Are your services technicians properly prepared for jobs? Do they have the tools and parts they need, access to previous job history, and other critical information to get the job completed correctly the first time? Research from Aberdeen Group has found the "average" field service organization resolves the issue on the first visit 80 percent rate and the "laggards" struggle at 63 percent.

**That means in many cases over 20% of customers are unhappy with the service being provided to them and the long term impact of that is huge.**

**Field service management software** that integrates with ERP systems ensures data can be retrieved as required, enabling service technicians to prepare more effectively for a service visit and increase first time fix rates. They can view all jobs scheduled for any given day, week, or month. For individual jobs the service technician can see the scheduled time, location, planned material and messages from the dispatcher.



# ROUTE AND RESOURCE OPTIMIZATION

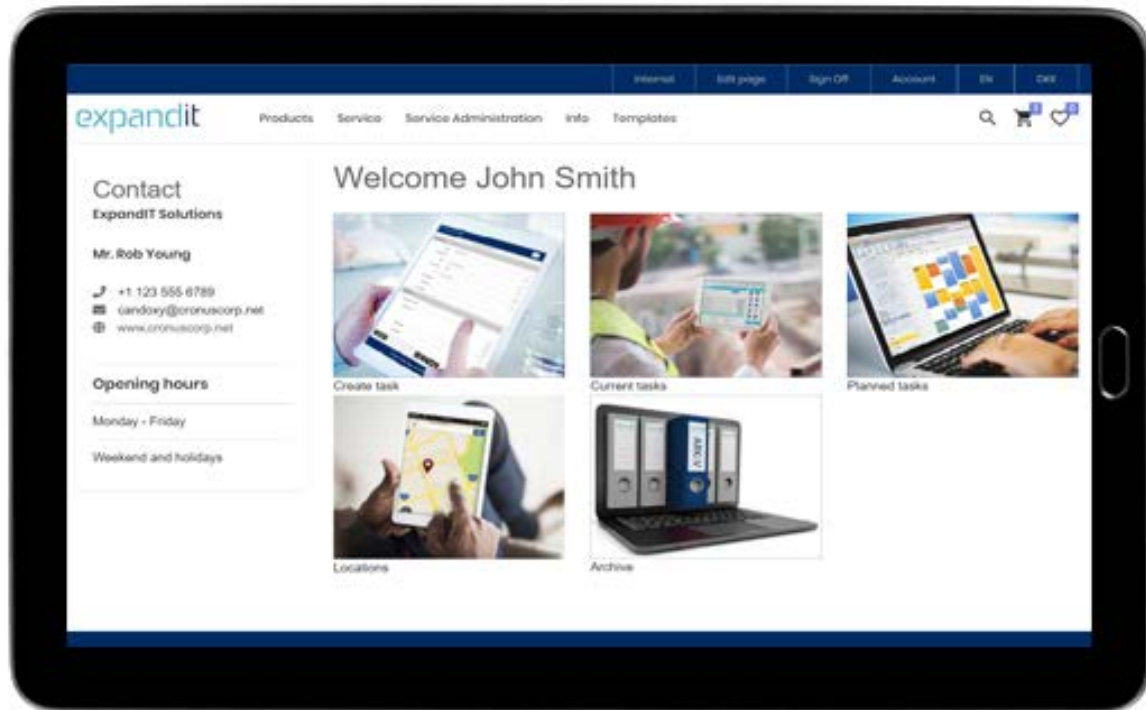
You have a 100 service technicians in the field covering a huge geographic territory. While everyone can perform most tasks, let's face it, some people are better at certain tasks and some technicians perform very specialized services.

**As a service organization you not only have to juggle the skills of your technicians but also their geographic locations when trying to respond to service requests.**

Field service management software that includes a built-in map showing the location of service technicians, as well as the location of jobs and estimated travel time, enables dispatchers to make informed decisions about the right person for the job when geography is a factor. They can easily adjust plans as information changes or updates are made.

Additionally, information can be communicated easily to service technicians by text, email, or internally in the software. Optimizing routes and resources leads to a reduction in travel time, improved response times, and increased customer satisfaction.





# AVERAGE SERVICE TO PAYMENT CYCLE IS 34 DAYS

(Aberdeen Group)

## INVOICING

Are manual processes, paper documents and disconnected systems making invoicing a slow and arduous process? Every day you wait for information to come in from the field about service work performed is lost profit. If sending invoices out takes weeks after a job is completed it is time to find a better way. Customers expect to use modern, on-demand technology that enables them to self-serve.

Field service management software that includes a self-service portal, enables customers to not only pay invoices online but encompasses all interactions with the customer.

Messages, pictures, documents and reports are instantly available to internal and external users. Customers can use the portal to quickly and easily communicate about scheduled visits, confirm their availability and schedule future visits.

Additionally, customers can access the same information in the portal as they do when they speak to a sales representative. The B2B logic such as ledger entries and credit card payments of all invoices are maintained in the ERP systems.

# A FIELD SERVICE MANAGEMENT SOLUTION WILL HELP YOUR BUSINESS IMPROVE:



**CUSTOMER SERVICE**



**COMPETITIVENESS**



**WORK PROCESSES**



**INNOVATION**

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