EBOOK

How to Determine the Best Field Service Automation Solution for Your Business

Nine Important Questions to Ask Before You Buy

Hitachi Solutions

Introduction

The right field service solution can transform your business into a connected, cohesive environment that provides excellent customer service. This is made possible by: reducing response times, lowering costs, improving first-time fix ratios, and increasing customer satisfaction to create a competitive advantage.

A quality field service solution will serve as a connection between workers out in the field and those in the office and provide a comprehensive set of features that helps to both automate and to hold various aspects of the business accountable. By improving this free flow of information, a field service solution can decrease wait time and streamline processes, resulting in increased productivity.

Proper research and evaluation is necessary to reap the benefits of a powerful field service solution while delivering a world class service experience. A number of factors must be considered, including customization, management techniques, implementation and support, legacy data and upgrades, and integration touchpoints. This eBook will help you begin your search by highlighting the most important field service solution functionality.

It will help you understand:

✓ What to look for when choosing a partner

✓ How to incorporate industry considerations in your search

✓ How to eventually implement and deploy an FSA solution
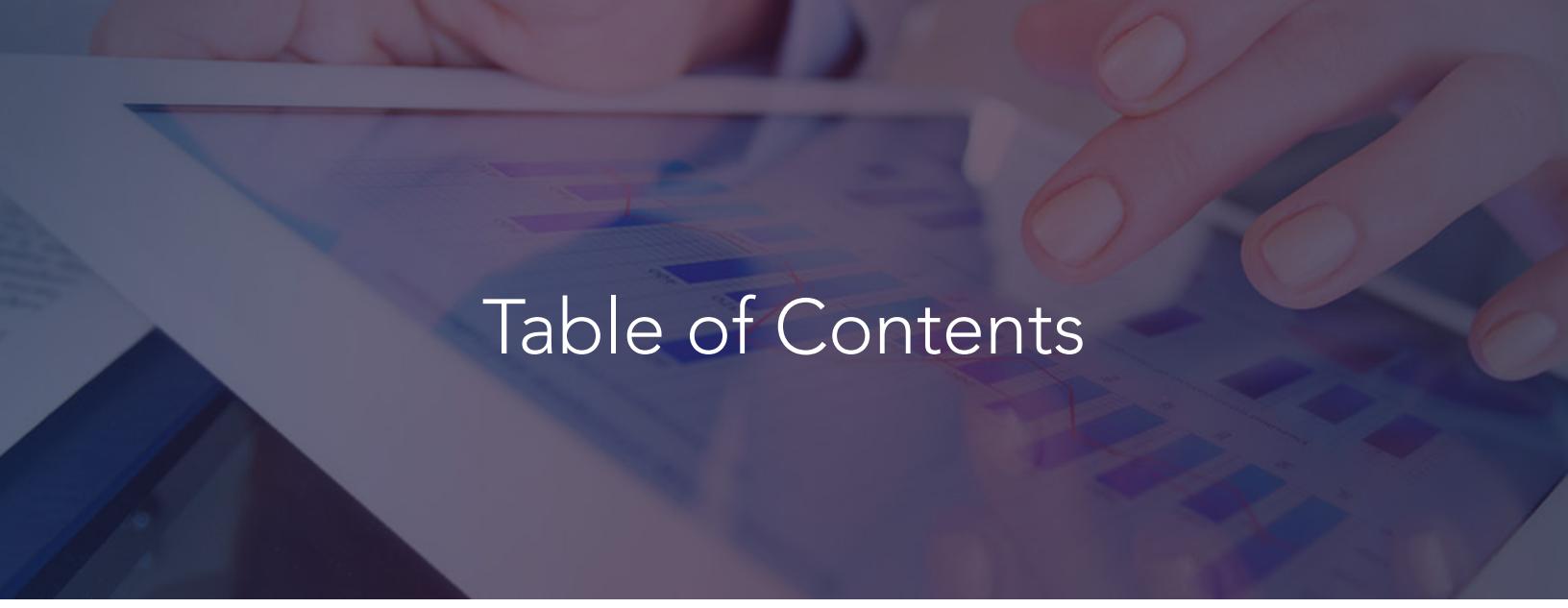
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01 / How can your software help me keep my people in the field accountable and drive automation?

'State of the art,' 'cloud-based,' 'fully-integrated' and 'seamlessly upgraded' are four auspicious adjectives nearly every consumer in the software marketplace has seen. With an attractive variety of vendors to choose from, all of which promise to deliver 'streamlined,' 'synergized' and 'optimized' returns, where does said consumer even start? Let's take it one step further.

When evaluating field service solutions, what is the main goal? The answer:

Automation

Accountability
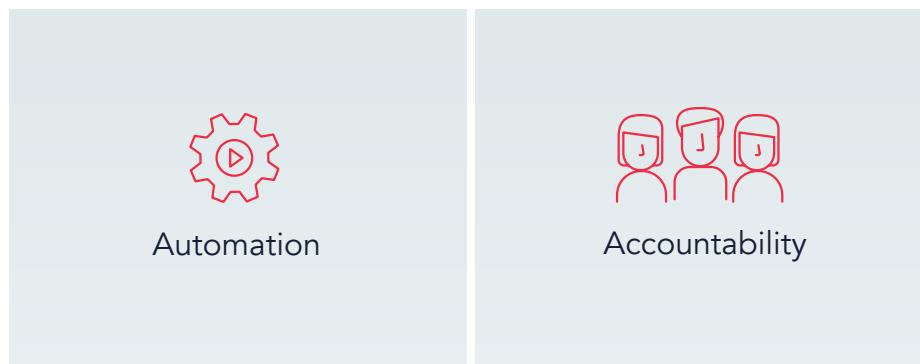
A good field service application should provide a comprehensive set of features that helps to both automate and hold all aspects of the business accountable. The field service applications which are deeply intertwined with not only the field force on-site, but also the people and processes in the backofficeare the ones with the most value to add.

Your field service solution should be built based on accumulated experience that spans regions and industries. This experience helps ensure that your company will receive a mature product that's been thoroughly tested to meet the daily needs of both field and back-office personnel.

A quality field service solution will support both the service based and job based business model, and will handle all fundamentals of a business, including:

- resource management and scheduling
- best-fit dispatch, work order generation
- materials planning and consumption
- SLA's
- performance scorecards

The best field service solutions will also be able to handle advanced facets of a business, such as route optimization, work order life cycle, labor/material planning and consumption, and fleet and warranty asset management.

Transparency is the key to holding both field and back-office accountable and driving automation Role-based dashboards can be instrumental in achieving transparency through the organization. Dashboards within a field service solution should provide office users a consolidated view of the business by constantly syncing, sending updates and detailed views into who's doing what, where, with whom, when, for how much, and why. By providing field personnel mobile devices that have online and offline capabilities, information can flow freely from the field to the office.

With the right mobile devices

information can flow freely from the field to the office
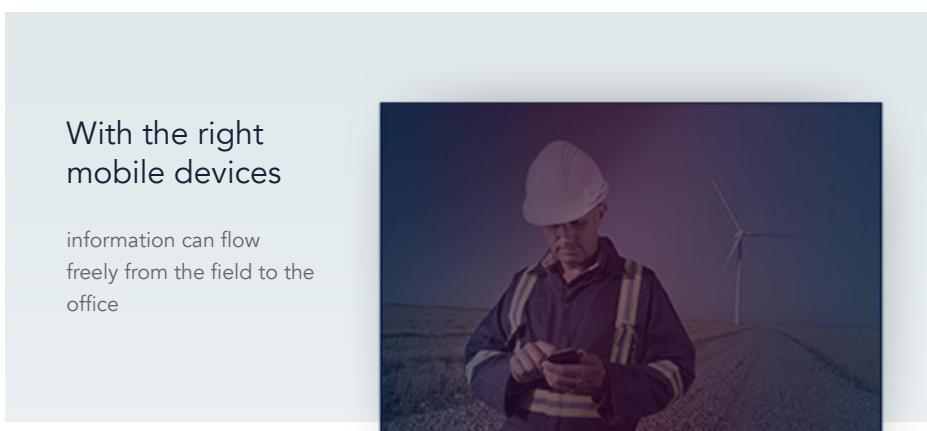
# 02 / Can the solutions be customized to meet my specific needs?

Each industry has its own scenarios and day-to-day processes that must be taken into consideration when evaluating a field service solution. The size and scale of the business determines which features and customizations are necessary to provide a suitable field service solution. A field service solution with a sound technological framework will allow for customizations as necessary to fully satisfy the users' needs.

By leveraging the lastest web technologies clients have a wide variety of options to have the software cater to their specific needs

With each implementation of a particular field service solution, the core product is adapted to include industry-specific features. What was once a customization may eventually be included out-of-the-box if it is deemed valuable. For example, a mobile field worker may need individual- and crew-based roles for field generated work orders. This would extend ERP to the field with FSA to support time and expense capture, skill-based HCM, payment capture, inventory management, and quoting in the field. This is why it is so important to choose a field service solution that has deep industry-specific roots.

Native configuration tools and system settings, which allow companies across different industry verticals to customize the platform, are an essential component of any field service solution. For example, by leveraging HTML5 and JavaScript technologies, clients can choose from easy to find and highly skilled developers plus a massive collection of reusable code and design patterns on the web to have the software cater to their specific needs.
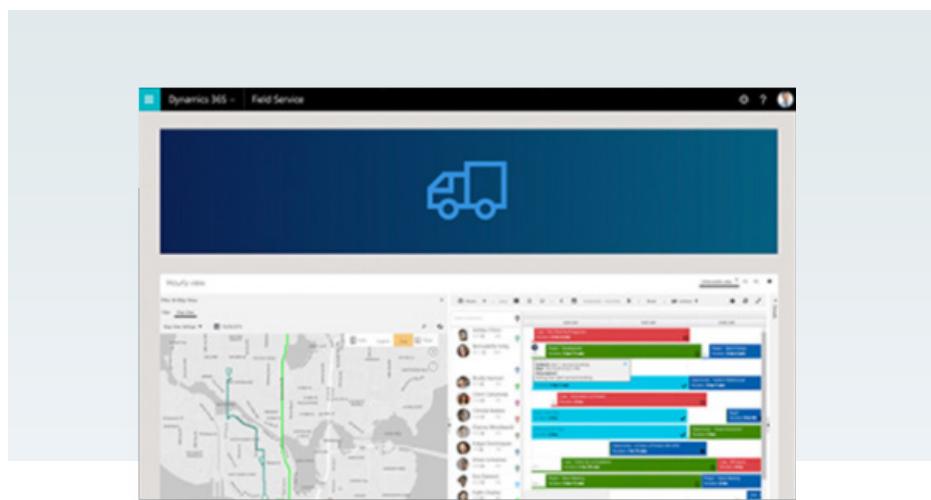
In addition to true customizations, field service automation software should have a variety of flexible features to allow a business to configure the core software to their particular processes without having to write custom code. This is made possible by defining customized data capture within the UI. For example, site safety inspections, PM checklists, quote data collection, diagnostic question trees, before/after photos, inspection questionnaires, and more will personalize the field service software to fit individual business processes.

03 / Do you have an out of the box solution?

When evaluating a field service application, one should always take into account the cost, scope and time implications of the implementation. How much will the system cost from a financial and resource perspective? What is the scope of what this project/system is trying to accomplish? How much time will it take to implement the system from start to finish; from analysis and discovery to post go-live support?

While there is not a direct correlation between these three metrics, there is a relationship or a common characteristic that drastically reduces cost, scope, and time. A software which is out-of-the-box and off-the-shelf often provides a more solid foundation to build upon. No end user wants to download an application that requires hundreds of steps and complicated configurations just to use its most basic functions.

At Hitachi Solutions, our FSA application includes a wide variety of base features and doesn't depend on any configuration for the software to work the moment it's installed. Although customization is possible, and often done to fine-tune, it isn't a necessity. Strategically developed as a packaged software product, factory settings allow FSA to run standalone and out-of-the-box – not as a "tool kit." Industry coverage supports a full range of field service processes: installations, break-fixes, scheduled maintenance, task-based work, depot repair, fleet maintenance, EAM, rentals and project work with minimal set-up.

Some noteworthy out-of-the-box features include:

- ✓ Service order management
- ✓ Maintenance Plans
- ✓ Retainer agreements
- ✓ Asset management

- ✓ Timesheet and expense approval wizard
- ✓ Service agreement/warranty tracking
- ✓ Resource skill tracking
- ✓ Calendar

- ✓ Service quote creation with customer/contract/equipment pricing automatically applied

04 / I'm on an antiquiated system, can you upgrade my system? What about legacy data?

A clean data migration process is pivotal whenever considering system upgrades. To a certain extent, automating a traditional paper-based operation can prove to be easier than upgrading a legacy system. In fact, in most cases a business is operating on more than one system, with several databases and many interfaces. The management of numerous systems and the inherent complexity of integrating data across these systems is often the motivation to begin searching for an upgrade; a cutover to one consolidated platform.
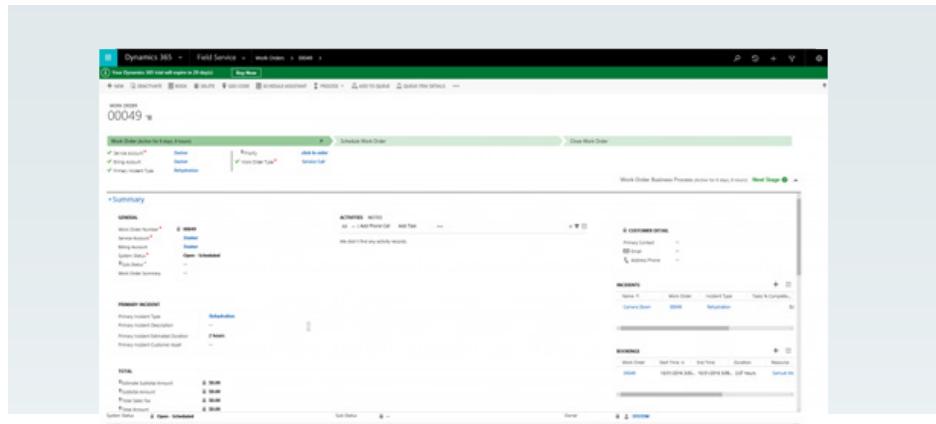
Regardless of the field service vendor being evaluated, there is no magic tool-kit that seamlessly extracts legacy data and does all the conversation/ manipulation needed to become compatible with the upgraded technology. ETL tools can simplify and automate the process to a certain extent, but the factors which most directly contribute to a streamlined upgrade focus on the methodologies and processes that go into upgrading a system.

Your approach to a system upgrade should be one that emphasizes building a strong relationship with your partner in order to convey the breadth of legacy data that exists. By developing a partnership with your vendor, you can ensure that they understand where data lives, the application and use for it, the requirements which rely on converting legacy data, and the clean-up needed to translate data from the legacy system to the new field service solution.

Your implementation methodology should provide a holistic solution that responds to your needs across people, processes, and technology with a constant focus on quality.

The methodology should flow in a cohesive manner, such as:

1. Designing
the plan and requirements

2. Defining
the specs and data migration plan

3. Developing
the test scripts and integration scenarios

4. Deploying
the UAT cutover plan to allow a smooth transition post go-live

05 / Do you have change management techniques for rolling out a new field service approach?

The expected change impact associated with deploying a field service solution depends on the starting point solution the company has in use. Customers conduct business in a variety of ways, from using clipboards, simple smart phone and calendaring features, or advanced field service office and mobile technology. Obviously the biggest change impact would be going from a clipboard and phone to an advanced field service office and mobile technology.

Consider that the largest impact would be associated with the highest number of users that are being impacted. That would typically be a company's field technician workforce. The ratio of call center or office users to technicians should clearly indicate the level of impact. To handle change management for the field workforce it is important to have field technicians participate as members of the project team. This is an ideal way to understand how project decisions can impact the company's field technicians.

By showing short videos of peers using the new system vs the old, trainees will realize they can make the transition as well - and they will also appreciate the candidness and thoughtfulness that went into the training curriculum.

This early involvement in the project also sends a message to the entire field services workforce that the company feels it's important to have a solution that will benefit the technician. The field tech workforce may find themselves entering more data, because more data is helpful to the customer and to running a field service business. This does not mean the technician needs to type paragraphs of information into a smartphone, tablet, or laptop. Good field service solutions take into account that the technician makes money by turning wrenches rather than data entry, and provide lots of prepopulated checklists and drop-downs that minimize typing.

The technician will also be impacted by the amount of data that is now at their fingertips. This will result in reduced trips to the office to chat with the CSRs or Service Managers. Now data such as customer information, directions, service order and equipment history, and timesheet information are all readily available. There is no more filling out service orders at the end of a job or completing timesheets at night or on weekends.

The second largest impact would be your customers. Implementing a state of the art field service solution can be a selling point to your customer base. Take advantage of the investment and let your customers know that you are serious about the quality of the service you provide. Automate your systems and processes and let your customers know what to expect when your field tech does work for them.

Next would be the impact to the customer service reps and service managers. Simply put, your CSRs and service managers will have a tremendous amount of data to more efficiently run the service operations. Experienced CSRs are the fastest to adopt new technology and quickly figure out the most efficient manner to use the solution. The rich data associated with the field service solution will enable your organization to review key metrics to ensure your operation is running at top efficiency.

Prepopulated checklists and drop-downs minimize the time spent on data entry and maximizes the amount of information that is readily available.

A key change management technique is to create short videos of users performing tasks on the old solution. Record their comments and concerns during the videos. Once the new system is up and running and the users are comfortable with the solution, take those same users and create short videos of them doing the same tasks on the new solution along with their comments and concerns. If the implementation is a success the users will express the value they find in the new solution, along with any challenges they encounter. Play these videos at the beginning of each training session as you deploy the new solution. The trainees will see their peers going from old to new, and realize they can make the transition as well — and they will also appreciate the candidness and thoughtfulness that went into the training curriculum.

06 / What is your implementation philosophy?

Do not purchase software from a vendor without first reviewing their implementation philosophy and methodology. Do not implement software without a methodology either. The implementation methodology needs to incorporate the key elements of a Project Management Office (PMO) and should be based on solid project management practices. The goal of a methodology is to guide the implementation using best practices that have been established by the implementer over a number of years and dozens or even hundreds of projects.

Look for an implementation philosophy that clearly communicates the high level phases of a project. Within each phase there are a number of tasks that need to be performed. The methodology should be adaptable to the size and complexity of the project being implemented. A new customer expects to quickly understand the overall tasks to be performed on a project. The clearer the methodology, the better the understanding and adoption. This means roles and responsibilities are more clearly defined.

Your methodology should also include numerous tools and templates designed to:

✓ Conduct the project kickoff

✓ Identify gaps

✓ Design

✓ Import data

✓ Conduct training

✓ Capture business needs from the customer

✓ Build and test custom solutions

✓ Resource skill tracking

✓ Conduct testing

✓ Deploy the solution

The tools and templates can be much more important than the glossies that represent the high level description of the methodology.

Building a project team that is made up of resources from both the client side and consultant is imperative. A true partnership creates a powerful pairing of resources that fosters a true understanding of the customer and their business needs. Additionally, this partnership will enable the customer to learn about implementation best practices and the solution being implemented. The sweet spot in a project is when the level of knowledge between both sides of the project are close to equivalent. This means that the implementation team understands the customer needs and the customer understands how to address those needs with the software solution. At this point the customer can transition into a more hands-on role with the field service solution, having the confidence and knowledge to obtain the value expected of the solution.
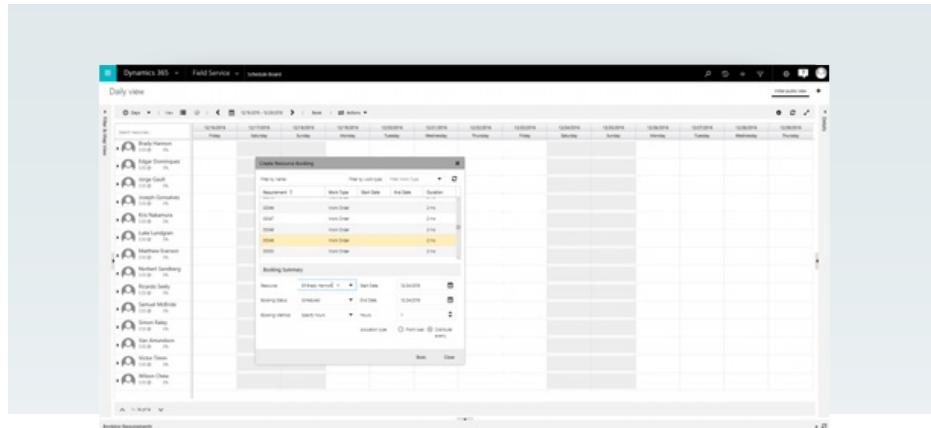
The final step in any implementation philosophy should be to transition to an ongoing support model. By taking the necessary steps to truly learn how your field service solution works, the transition can be as seamless as possible. Knowing how to obtain support and feeling confident in your team will minimize issues and fast track any troubleshooting that may occur.

07 / What type of ongoing support / maintenance is provided post go-live? What is the cost-structure?

Your consultant should be able to connect you with dedicated, experienced technicians to support your needs. Scheduled maintenance should be a top priority, and can be billed at a monthly rate, with a base allocation of hours which can be used however is needed. Prices that are fixed and paid monthly help make system ownership a predictable operating expense.

It should feel like your support team is in house and you are always able to quickly connect with them via your phone, email, IM, Skype, Lync, or your preferred methos of communication.

Hitachi Solutions utilizes a team of experts for its Live FSA because long experience with field service has taught us that the right people can cover the challenging breadth required to keep a system live and thriving. We build our teams right, and support them with the breadth and depth of the Hitachi Solutions global team. Live FSA is a post implementation support plan that is designed to fit the needs of companies that are already live with Hitachi Solutions' FSA or have limited internal resources or the right skill set to manage the solution. The program can help with utilizing FSA features and functionality by improving performance and usability and developing richer reports. Live FSA support is provided for fix scenarios, emergencies, and upgrades at a low cost by a dedicated team with 24/7 coverage.

08 / Do you offer an end-to-end solution for my industry?

Choosing the right solution for your industry is critical – whether that involves a simple approach with no accounting/ERP integration or the deepest of financial requirements with intensive integration. It is important to research a variety of solutions and choose the one with the deepest industry focus, which will make implementation smooth and customizations minimal.

End-to-end industry offerings for service based companies should include:

ERP Integration	Industry Gap-Filling Functionality
Hosting (if required)	Managed Services

Hitachi Solutions has more than 100 field service customers across 20 countries, 10 languages, and in diverse industries that include: oil and gas field services, industrial equipment services, medical devices, security, high tech, and a 75 percent share of the North American Residential HVAC market.

09 / What systems do you integrate with?

Your field service software should have extensive integration experience, across multiple methods and integration tools. It is common for service-focused organizations to have a need for integrations to internal systems, as well as customer and supplier systems. Integration with your ERP system is an absolute must, as well as stand-alone EAM, Inventory Management, Warranty Management, OEM and GPS packages.

10 / In summary

Choosing the right solution for your situation is critical – whether that involves a simple approach with no accounting/ERP integration or the deepest of financial requirements with intensive integration. A powerful field service software can help reduce response times, lower costs, improve first-time fix ratios, and increase customer satisfaction to build a competitive advantage.

Connect your office and field staff with the information and processes they need to satisfy customers more effectively with Hitachi Solutions' Field Service Automation. Our team gets field service! We know that field service is not just another module, but an integral part of service companies that touches and interacts with every part of the business – or at least it should. We care about our customers, and have a proven process for listening and truly understanding their business and requirements. We partner with our customers to bring a wealth of industry knowledge, best practices, critical thinking, and implementation excellence.

Our services team has more than 400 cumulative years of experience that includes IP Development, QA, and delivery consulting services focused on field service business optimization. With an average of 12 years of project-related field service experience, our team is well-versed in field service. If you really want to understand the nuance of hitting the right balance of product fit for your situation our team can guide you through it, with intelligence and practical advice.

Don't let your response times and customer service suffer. Consider implementing a new field service solution today.

If you're ready to start the conversation on FSA, reach out to us at http://us.hitachi-solutions.com/contact-us with any questions. We help businesses like yours improve their business management models with technology every day.

CONTACT US