



5 ways to know you  
are ready for connected  
field service

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Field service organizations (FSOs) have traditionally followed one of three workflows: installation, maintenance, and break-fix or repair appointments. Of these appointments, break-fix can be very costly to the company. In addition to the cost of rolling trucks for repair appointments, technicians often have to perform initial diagnostics only to find that additional follow-ups are needed to complete the repairs. Customers, in turn, experience downtime and become frustrated when the repairs are not completed during these first calls.

Because customer satisfaction and technician productivity are at the center of any successful FSO, firms can start to impact both areas by taking advantage of smart, internet-ready devices that can detect and diagnose issues, integrating with field service management (FSM) software to automatically initiate troubleshooting and, when needed, create work orders to schedule technician follow-ups.

Leveraging this connected field service model allows companies to monitor equipment remotely, troubleshoot and self-heal distressed devices, and ensure repairs are made before downtime occurs. This eBook presents you with the opportunity to assess whether your organization is ready to get started with connected field service.

To help illustrate connected field service, let us look at three levels of implementing a practical example. An FSO installs a sensor on a heating unit at a client site. Then, the sensor sends information about the equipment to the Cloud where anomalies are detected and flagged automatically.

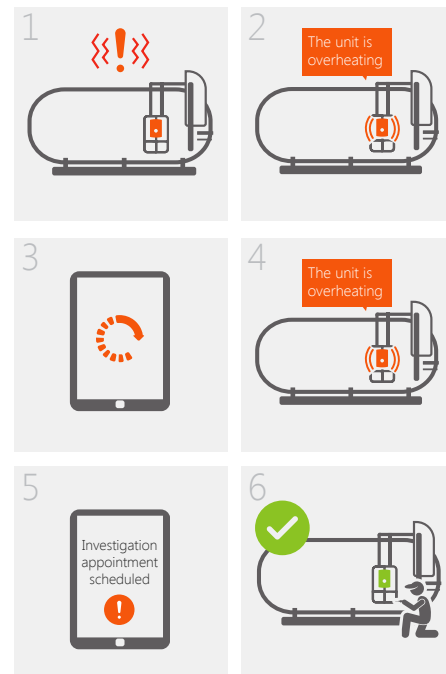
### Basic connected field service:

If the heating unit starts running too hot, for example, an alert is sent to the field service management system, and a technician is automatically scheduled and dispatched to investigate without any human initiation. This technician is dispatched before the client even knows there is a problem.



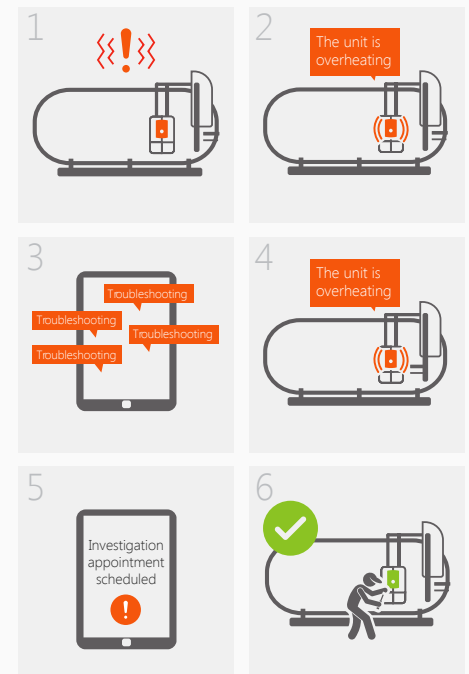
### Advanced connected field service:

This time, when the heating unit gets too hot and the alert is sent, instead of immediately dispatching a technician, the field service management system sends a command back to the device, instructing it to perform a restart to see if that fixes the problem. The field service management system then waits to see if another "high temperature" alert is received. If the restart did not work, then a work order is automatically created and a technician is scheduled and dispatched.



### Expert connected field service:

At the expert level, the field service management system tries multiple ways to attempt more detailed troubleshooting. This technique exhausts all automated options for fixing the distressed equipment before a technician is scheduled.





**Connected field service, at any level, provides many advantages. For example, it can:**

- Improve customer satisfaction with reduced downtime.
- Predict and proactively prevent breakdowns.
- Address issues faster by monitoring devices remotely.
- Automatically determine and schedule resources when field technicians are needed.
- Provide a central view for product usage, issues, and repair history.
- Reduce costs by dispatching the right technician only when needed.
- Identify under-performing or faulty equipment.
- Allow preventative maintenance on consumption versus fixed schedule.
- Improve first-time fix rates.

Connected field service combines the Cloud, Internet of Things (IoT) technology, and sensors with the power of a robust field service management solution. This model redefines how companies think about service.

Connected field service is relatively simple to set up, can end up saving you money, and can be implemented in stages as your organization becomes more comfortable using it.

You should be excited! Connected field service can help your FSO achieve higher customer satisfaction and higher first-time fix rates as well as increase technician productivity. It can even help your business create new revenue streams focused on service.

So, how do you know if you are ready to get connected?

## No. 1: You are already using a field service management tool successfully



It is best if your FSO already has first-hand experience using a traditional field service management tool because your organization is comfortable with using software to improve key metrics and be more successful.

Connected field service expounds upon the functions of traditional field service management tools. Consequently, a familiarity with the features particular to a traditional field service management tool facilitates the progression toward incorporating connected field service into the mix.

If your team is already accustomed to including a field service management tool into standard operating procedures, the transition to connected field service could be even easier. Because your stakeholders have already acknowledged the value of traditional field service management, assessing the merits of leveling up to connected field service can be a natural progression. With everyone on the same page and routinely utilizing traditional field service management software, you are well on your way to introducing connected field service.

## No. 2: You want your technicians to move beyond break-fix



The role of field technicians is evolving, and their contributions to your FSO broaden the conventional definition of “service provider.” Today, field technicians are uniquely poised to be experts within their industries, create new sales opportunities, and detect product competitors while at the client site. By leveraging connected field service, you can enhance these aspects by improving field technicians’ efficiency while on-site.

### Let us think about it:

- A sensor with connected capabilities can be placed on client equipment to collect status reports.
- When the sensor transmits data back to your HQ, it is, then, integrated into your connected field service software where it is matched with customer information that exists within your current database.
- Then, the data is delivered via the Cloud to the technician en-route to the client site where he or she can view the complete customer history in real time.

The data mined from the connected sensor eliminates the need for the initial on-site diagnostics. Armed with critical data relevant to the status of the malfunctioning equipment in question, the technician arrives to the client site briefed and ready to tackle the issue at hand. In spending less time on costly repair appointments, technicians can become trusted advisors and can provide educated recommendations, effectively growing the account.

A positive customer experience should be central to your FSO’s operations. With connected field service in place, customer satisfaction can be elevated thanks to improved technician productivity.

## No. 3: There is an appetite for technology adoption across the business



Every company has a different standing within the digital literacy spectrum. While field service management systems are widely adopted, fewer FSOs are implementing advanced technology like automated, optimized scheduling, for example.

Connected field service presents an end-to-end solution for managing work orders and field technicians in a digital manner. Thus, it is a good idea for your key stakeholders to possess an awareness of how the various components of a field service software (such as CRM, the Cloud, and IoT) can advance current operations.

### **Here are a few questions you can ask yourself to assess your appetite for technological adoption:**

- In the past few years, have you shifted from on-premise servers to Cloud or a paper filing system to a CRM?
- In the past few years, what is the general attitude toward new technology in your business? Does your team embrace it and try to learn it -- or do they constantly complain that it is another thing they have to deal with?

If there is a core group of technology enthusiasts within your FSO who perceive new technology to be an opportunity rather than a threat, you are well on the road to introducing connected field service.



## No. 4: You want (and need) to improve KPIs



Every business measures key performance indicators or KPIs that help the executives and staff members understand just how the business is performing. Traditionally, these metrics center around areas such as:

- Revenue
- Profits
- Growth
- First-time fix rates
- Drive time
- Service time
- Client satisfaction
- Invoiced jobs

However, even the most successful companies in the world do not hit every KPI every time, and there is always some room for growth. Connected field service can help organizations who want to improve KPIs.

Let us take one KPI and see how we can improve it by implementing connected field service.

### **KPI: Decrease driving time**

Connected field service allows for preventative maintenance to be performed “just in time” based on consumption rather than on a regimented schedule. For example:

Take an organization that is supposed to replace its air filters every six months. However, filters in notably dusty environments may need to be replaced more often than the standard recommendation calls for in order to maintain optimal performance. With connected field service, a sensor placed on the equipment transmits an alert when the filter needs to be replaced, giving the field service organization the flexibility to simply add this work to the next scheduled appointment at that customer location, thus reducing driving time required to make a special trip only to perform this single task.

The FSO achieves its KPI, and the customer site is more likely to experience improved uptime as filters are being replaced as needed. By tapping into relevant data points amassed via sensors with connected capabilities, connected field service enables FSOs to shift from reactive to proactive maintenance.



## No. 5: You are thinking about how to create new revenue streams



### The rise of servitization

Servitization is the model of selling the use of a product rather than the product itself. This subscription-like arrangement parallels the “Uberization” phenomenon. Today, our world is pressed for time and is more intent on receiving rapid, customer-centric service than ever before. Servitization presents a compelling response to these demands.

Rolls-Royce represents one of the most notable exemplars of this business model. The luxury automobile and aerospace giant sells flying hours for each jet engine rather than selling the engine itself. Outcome-based business solutions that sell “power by the hour” keep clients satisfied with prices that better align with the company’s actual usage of the product.

### Connected devices in servitization

Meanwhile, the Rolls-Royce engines’ maintenance statuses are monitored remotely. How is this possible? You guessed it: connected field service is key. Sensors placed on the engines keep field technicians informed of any possible anomalies before the clients even have a chance to pick up their phones.

The data collected from connected devices is used to implement preventative measures, like consumption-based maintenance and self-healing of distressed devices, thereby improving the longevity of the product. If a motor runs slow, all the data points the connected sensor has amassed can be run against the analytics as clues piecing together the root cause of the issue. Connected field service can even empower your FSO to spot trends and identify underperforming equipment, a benefit that can prove to be immensely valuable when deciding whether or not to switch vendors.

The revolutionary servitization model speaks to the millennial generation and positions your FSO with a competitive edge to better market to the age group that will become key consumers in the next 10 years. Soon, 10,000 loads of laundry will be for sale instead of the washing machine itself, and your FSO will need to be able to capture quality data and respond accordingly. The data is out there, and connected field service makes it actionable.

# Conclusion



The reality is simple: The “future” of field service is already here. Connected devices can empower FSOs with the ability to monitor equipment remotely, transmitting data into the software’s database in real-time. But how do you know you are ready for this next step in the evolution of FSM? Let us recap:

1. Traditional field service management tools have already begun to trickle into the everyday routine of your FSO.
2. You want to establish your field technicians as industry experts, equipped with data that helps improve productivity while amplifying customer satisfaction.
3. “How do we keep up with the latest technology?” is a frequent topic of discussion amongst your team.
4. Hitting your ever-advancing KPI targets are important to you.
5. You are intrigued by alternative business models like servitization or selling “power by the hour.”

In harnessing the power of IoT combined with the Cloud, your FSO can shift from the traditional break-fix repair model to a never-fail service model.

See connected field  
service in action [➔](#)

