

MID-SIZE MARKET IN FIELD SERVICE:

Is centralizing scheduling the right next step?



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Introduction

Mid-size service companies have become more mobilized and field service-oriented in the past few years, driven by a combination of evolving customer demands and the availability of revolutionary technological solutions. Although the change is a bit more recognizable in industries that were not always relying upon remote workers to accomplish tasks, those that have long operated in the field have experienced similar changes.

New technologies have helped propel industries such as telecommunications, utilities, insurance and manufacturing forward as their needs to handle complex field service continue to grow. Organizations can more accurately and proactively manage scheduling, field service protocols and remote workers through centralized systems today than would have been possible in the past.

Now, before diving into the specifics of how field service solutions can be used to strengthen financial and operational performances among a wealth of organizations, it's important

to remember that new technology, in general, is leveling the playing field between larger and smaller firms. This can be seen in virtually every component of operational management and strategy, such as online marketing for more affordable brand building and cloud computing for enhanced power on budget.

Small and mid-market firms once struggled to compete with their larger counterparts simply because the latest and greatest technologies were unattainable from a budget and resource perspective. Now, new movements have flipped this fact on its head, helping companies to quickly improve upon their existing processes without putting themselves in a bad financial position.

Moving back to field service solutions, entities operating in a diversity of industries and regions will be able to leverage new tools and strategies to bolster the efficiency and fluidity of operations.

A Call for Centralization

Service industries depend on their field service workers to deliver expert, consistent support to clientele in remote locations, and not keeping track of every employee can hinder a mid-market firm's ability to optimize operations. Some of the more common challenges with respect to field service management include the following:

- Efficient scheduling
- Measurements of remote worker performances
- Oversight of customer feedback
- Lack of visibility of field services in action
- Travel and route management
- Data communication and analysis

Mid-market firms need to ensure that field service operations are not creating any form of wasteful spending, as this can quickly reduce the chances of these companies competing with larger enterprises. This type of waste is often a symptom of more management and oversight capabilities, as well as a lack of a centralized system with which supervisors can track the full breadth of activities.

A field management service solution quickly reduces the risk of waste by centralizing the entirety of oversight into one, more functional system. Let's put it this way – companies that don't accurately handle scheduling,

performance measurement, customer feedback and data analysis might not be getting the most out of their assets.

So, the financial component of mid-market firms competing with others in their markets and larger enterprises can be swiftly reconciled through effective software.

The operational aspects of field service management will be imperative with respect to attaining an edge on the competition as well. With all of this on the table, it is time to explain how mid-market firms can establish more effective strategies and policies and support them with next-generation solutions for optimal performances and control.

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Getting Started

The first step toward field service optimization is the development of a strong strategy that governs activities, guides oversight procedures and optimizes the ebb and flow of management at large. Once this has been completed, the selection and implementation of field service management software will generally come back with higher returns on investment.

Here are a few matters mid-market firms should keep in mind when developing their field service management strategies:

- Alignment of goals, actions: Decision-makers in these organizations should diligently research their current field service management performances to evaluate which components could be improved, as well as the ones that are functioning optimally. Any procedures or managerial frameworks that are in place and not directly leading to stronger performances should be replaced with ones that align with specific objectives.
- Identification of waste: This can be a tricky matter, but leaders should look to ground-level employees and supervisors for information regarding the proliferation of waste in field service. Once the actual waste has been uncovered, it should not

be difficult to understand why the problem is occurring.

- Tracking customer engagement: Client relationship management should always be the priority, and software will be necessary to identify and eradicate holes in customer service. This capability helps to attain and sustain exceptional customer engagement.

Without a comprehensive view of the ways in which field service is functioning currently, as well as how it should be operating in an ideal situation, mid-market firms will likely have trouble improving each year. A 360-degree view of these matters will yield continuous opportunities to refine field service management for a stronger competitive advantage.



The Merits of Field Service Management Software

Mid-market firms will often need to keep their managerial staff as tight and lean as possible, especially when compared to larger enterprises. This is one of the fundamental reasons why these companies might struggle to compete with larger companies – and operate optimally in their own rights – when the right technologies have not been deployed.

The right solution can seamlessly support the policies, strategies and oversight frameworks in place to ensure that leaders and managers have maximum control and visibility of offsite activities. Other capabilities include:

- Scheduling and mobility applications for comprehensive planning and optimal work order management
- Route optimization solutions to get field workers where they need to be in the most efficient fashion possible
- Appointment management to keep customers and employees on the same page and supervisors in the know regarding performance and general activity
- Real-time data communication to establish timely reports and accounting procedures, enabling quicker, more accurate identification of waste

The name of the game in field service management is the stimulation of optimal productivity among staff members through empowering solutions and support. With a field service management solution that can provide the aforementioned functions and others, mid-market firms will be better positioned to excel in their respective industries.



Closing Considerations

Field service management software has become more intuitive and accessible in recent years, which is one of the main reasons why mid-market firms have been able to use them in greater numbers. Firms still need to take their entire business into consideration prior to deciding the best solutions, as not all will be a right fit to their operations and needs.

One of the greatest mistakes a business leader can make is to exceed their limitations, or at least try to do so, all in hopes of saving a miniscule piece of budget or speeding up the deployment of a new strategy. Mid-market firms that do not have a wealth of knowledge regarding field service management optimization should look to service providers and implementation partners for support in strategic development and software use.

Implementation and management services can help mid-market firms more fluidly deploy advanced field service solutions, as well as others, without straining IT departments or stifling operations as a result of a sharp learning curve.

Mid-market firms that diligently plan and thoroughly research their needs, and create accurate policies and strategies will be better positioned to get the most out of advanced software.

At the end of the day, are you completely comfortable with your

scheduling strategy, and can you say that it is functioning optimally and driving customer engagement? If not, it is likely time to re-evaluate your current strategy.

“Implementation and management services can help mid-market firms more fluidly deploy advanced field service solutions”

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