



# SIX ESSENTIAL CONSIDERATIONS FOR FIELD SERVICE SOFTWARE SOLUTION

## KEY QUESTIONS:

**P4**

Does the software provide fully integrated capabilities for all field service related functions?

**P5**

Can the software be easily configured and customized by the users to match their unique business requirements?

**P5**

Can mobile devices and/or portals be used by field service staff and customers to access and update the software remotely?

# SIX ESSENTIAL CONSIDERATIONS WHEN CHOOSING A FIELD SERVICE SOFTWARE SOLUTION

THIS PAPER WAS AUTHORED BY MICHAEL ISRAEL OF JOLT CONSULTING GROUP WHO SPECIALIZES IN CUSTOMER SUPPORT AND FIELD SERVICE RESEARCH AND ANALYSIS. SALES, MARKETING, BRANDING AND IDENTITY. HE HAS A LONG HISTORY IN CUSTOMER SUPPORT AND FIELD SERVICE OPERATIONS AS A CONSULTANT AND A SUBJECT MATTER EXPERT.

Field Service is a remarkably complex business. The variety and volume of data a field service organization must work with, gather, and manage is extraordinary. Think about it.

**There's customer related data.** What equipment do customers have, is it owned, leased, or on loan, new or refurbished, how and when is it used, where exactly is located, what's the configuration, what are its component sub-assemblies, is it covered under a service contract or a warranty, what are the service agreement or warranty terms, what's the service history for each piece of equipment, and more.

**There's service and repair data.** What are service response and repair times, what symptoms and problems were reported, what were the resolutions, are service level agreement commitments being met, what are service labor and travel times, what parts or equipment were replaced, are reverse logistics actions involved, was the service billable or performed under a warranty or service contract, and much more.

**There's service technician data.** What are their skills and certifications, on what equipment have they been trained, what is their work schedule, where are they located, to what group or territory do they belong, are they assigned to one specific customer or do they support many, do they use a company car or van, do they carry spare parts, what is their job level and pay grade, what is their career path, are they full time, part time, or 3rd party contractors, etc.

**There's spare parts logistics and supplies data.** What parts are in stock, where exactly are they located, are they company owned, customer owned, or consigned, is there excess inventory, is there obsolete stock, what parts are needed, where and when will they be needed, what parts are on order or in transit, in what equipment can the parts be used, are there substitutes or equivalents, are they part of a kit, are they critical, must they be controlled in some way, are they serialized, are they repairable or disposable, which parts are good and which are in need of repair, are reverse logistics processes needed, and so on.



**There's the all-important financial data.** What are service and repair costs, how much revenue is service generating, what is service's P&L contribution to the corporation, what's the value of service parts inventory, what are the financial terms and conditions of service contracts, are service contracts being billed correctly and on time, is service revenue being accrued and recognized properly, how many new service contracts are being sold, how many contracts renew to a new term, are time & material services being invoice promptly, what are warranty service costs, and more.

And last but certainly not least, there's the critically important analysis of all this data to pinpoint potential problems, and even spot positive trends. Only this in-depth analysis can provide the insight needed to develop or adjust business plans appropriately.

It seems fair to say that no other organization in your company is responsible for collecting, accessing, tracking, updating, maintaining, and analyzing such a diverse and critical amount of data. So how do you do that in the most efficient, cost-effective and productive way possible? The answer of course is software designed for these purposes. But which software solution to choose? There are CRM, call center and ERP solutions, dispatch, routing and scheduling solutions, contract and warranty management solutions, depot repair solutions, mobile and RFID solutions, supply chain, inventory control and parts planning solutions, GIS and GPS solutions. Each of these software offerings can help manage varying degrees of field service related data. But only a complete and fully integrated software solution designed specifically for field service operations will provide the robust data management, operational, and analytical capabilities a field service organization needs to operate at peak performance.

Companies considering implementing new field service software, or contemplating replacing a legacy system with a newer solution are advised to evaluate these six essential criteria in their selection process:

- Is the software designed and developed specifically for field service operations?
- Does the software provide fully integrated capabilities for all field service related functions?
- Can the software be easily configured and customized by the users to match their unique business requirements?
- Can mobile devices and/or portals be used by field service staff and customers to access and update the software remotely?
- Does the software include custom reporting and business analytics capabilities?
- What is the field service expertise and experience of the company offering the software solution?



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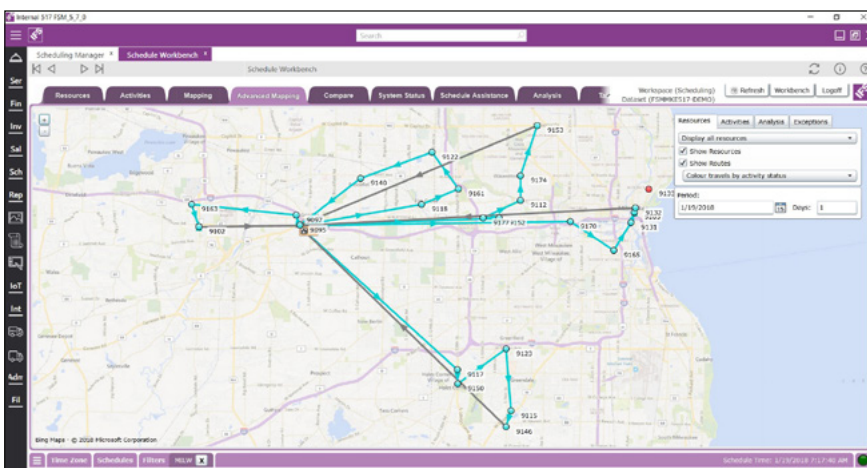
## DESIGNED AND DEVELOPED SPECIFICALLY FOR FIELD SERVICE

There are numerous CRM, Call Center, Help Desk and ERP solutions available that provide customer service and support capabilities. These solutions can help companies control and manage their call center and customer support activities more effectively. However, as we've seen, field service requirements are much more complex and diverse than most call center and customer support functions. Therefore, it is essential that companies considering software for field service evaluate, select and deploy software designed specifically for field service. Solutions providing narrower capabilities will deliver only partial—and less than ideal—results.



## FULLY INTEGRATED FIELD SERVICE FUNCTIONALITY

Field service organizations use and manage customer data, installed equipment data, technician and staff information, spare parts, tools and supplies details, maintenance contract and warranty specifics, service invoicing data, service and repair costs and service revenue information, and service business performance analytics. Action taken in one field service function often requires follow-on actions and database updates in other functions. For example: billable service calls require the timely creation of invoices, parts usage in repairs may dictate that purchase orders be issued to a vendor for replacement parts, an equipment exchange during a service call will dictate the automatic update of a model or serial number in the customer's record and the immediate creation of an RMA for the defective equipment, etc. A complete software solution designed for field service will provide seamless integration across all these data points and functions. Moreover, complete and fully integrated field service software allows users to create workflow rules specific to their business requirements, which automatically trigger appropriate data updates and follow-on activities.



## USER CONFIGURABLE AND CUSTOMIZABLE

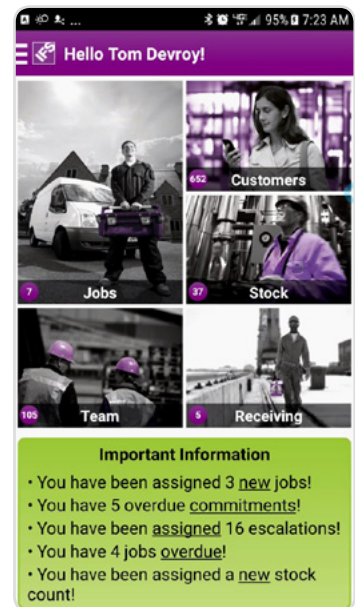
Field service businesses should not have to conform to the requirements of a software package; the software should conform to the business requirements of the service organizations. Therefore, the field service software that companies deploy must give users the ability to configure and customize the software to fit their unique and specific needs. At a minimum the solution should allow users or system administrators to: add/remove fields, change field names, add/remove screens, add/remove/ rename tabs, customize the content and layout of the screens, create new database elements, assign specific roles, capabilities and security to individual users or groups of users, design custom reports, and create custom workflows.

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## REMOTE ACCESS VIA MOBILE DEVICES AND/OR PORTALS

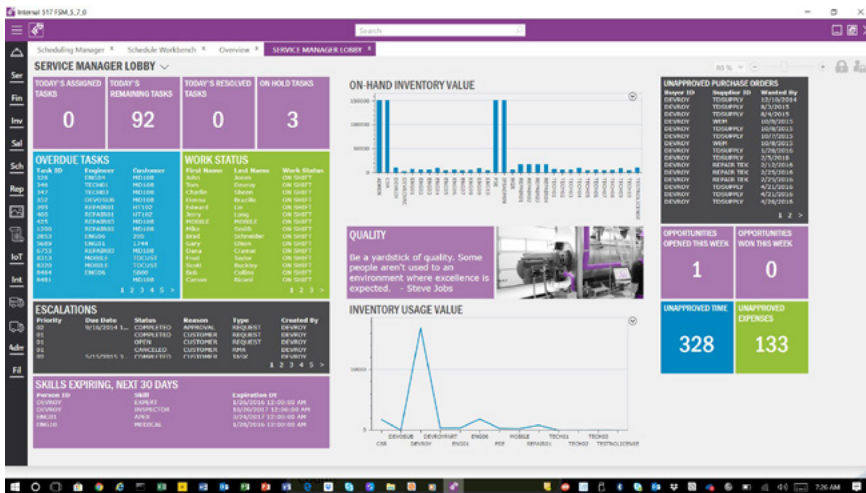
Field service technicians and staff, and customers alike must have remote access to relevant service data. Field engineers should be able to access the system via portals and/or through remote devices, such as smart phones, tablets, and laptops. Such remote access must give field service staff the ability to: see scheduled jobs, view and update service request records, record service parts usage and parts orders, access complete customer, service contract, and warranty information, see full customer and equipment service history, view symptom/resolution knowledge base articles, directly communicate with peers, and more. Customers should have remote access via portals to: create new service requests, request return material authorizations (RMA), inquire about the status of existing service requests and RMAs, order parts or supplies, view service contract and warranty information, see their installed equipment information, update equipment location information, view and update contact information, and more as appropriate. Portals must be easily customizable to fit each end user's specific needs and security authorizations.



## REPORTING AND ANALYTICS

Service related data in and of itself is of little value. But in-depth analysis and scrutiny of that data will reveal crucial information that can boost productivity, grow customer satisfaction, improve employee morale, trim costs, raise revenue, lift profitability, pinpoint problems, and highlight both negative and positive trends. To yield these benefits the solution must allow for custom and ad-hoc reporting at a minimum. An ideal solution will also provide users with the ability to define key performance indicator goals (KPIs) and to easily measure actual performance against those goals. Users should be able measure performance against targets such as: average response, resolution and travel times, first visit fix rates, service costs, maintenance contract revenue, warranty to contract conversion rates, contract renewal rates, profitability, SLA compliance, and virtually any other KPI the using organization deems necessary and useful for its operations. A complete solution will also empower users to create a variety of custom charts and graphs, which display performance measurements in visual and readily understood dashboards.





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## SOFTWARE VENDOR EXPERTISE AND EXPERIENCE

Field service processes are intricate, varied, and they impact multiple organizations within a company. It's imperative therefore that the vendor designing, selling, implementing and supporting the software has a thorough and first-hand understanding of field service operations and requirements. Companies considering which field service software solution to select should ask and be satisfied with the answers to these questions: how much and what experience and expertise do the software designers have regarding field service operations; for how many years has the vendor been designing, installing, and upgrading field service software solutions; how many field service software implementations has the vendor's professional services team completed; how many customers are currently using the solution; can conversations and visits be arranged with those customers.

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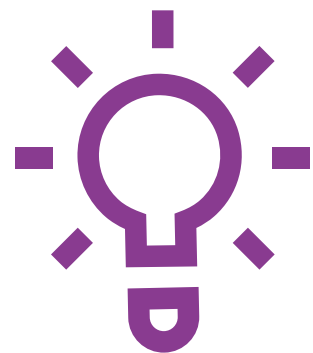


## SUMMARY

Service organizations that are, or will be, in the process of evaluating field service software should be sure that both the solution and the vendor they select conform with each of the six criteria described above. Anything less will be short of ideal.

The IFS Field Service Management solution meets all these requirements. The software was designed exclusively from the ground up for field service, provides complete and robust service functionality, offers easy user customization, includes multiple remote access capabilities, contains sophisticated analytics and reporting, and is backed by an organization and staff that has implemented and supported the software at hundreds of service organizations in a variety of industries for more than 30 years.

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