



# Manage field service efficiently and safely during challenging times

6 best practices of field service leaders

“

*8 out of 10  
customers are  
willing to pay  
for a better  
customer  
experience*

**Capgemini**

“The Disconnected Customer: What digital customer experience leaders teach us about reconnecting with customers,” 2017.

## **First-class field service is critical for a great customer experience**

For some customers, field service is the face of the organization. Many times, those one-on-one interactions are the only experience a customer will have with a company. Given that many companies say they are now competing mostly on the basis of customer experience, it is clear how important it is to get field service right.

Whether completing an installation, doing a routine inspection, or fixing an issue, it's important the job is done fast and well to meet the needs of the customer and respect their time. It can be difficult to do under the best of circumstances, which means it can be nearly impossible to accomplish when the worst happens, unless you are prepared.

Unfortunately, recent events caught most organizations off guard, hampering their ability to keep service running and respond to all their customers' needs. With technicians suddenly unable or limited in their ability to physically go into a home or complete work on site, many companies struggled to meet service level agreements (SLAs) and take care of all their customers' issues.

So, how can you prepare your field service operations to be more resilient to handle whatever is next?



## Make sure you can always manage location-based work efficiently and safely

Many field service organizations today have limited insight into their customers' on-site equipment, which makes it difficult to monitor performance or ensure regular maintenance is done to head off potential issues. Worse yet, many still manage much of their work manually, using spreadsheets, email, and even pen and paper.

This leads to inefficient operations and repeat visits, which cause customers to become frustrated, as well as technicians, because they feel their time is being wasted. It also puts the "tribal knowledge" of experienced technicians at risk because their quick fixes, best practices, and general know-how is never captured or reused to the benefit of anyone else.

These manual processes and information silos need to be modernized if field service is to deliver the experience customers are looking for. Anything that isn't fully online or digital needs to be to ensure field service can be managed efficiently and safely. This takes rolling out capabilities that ensure you can:

- ▶ **Send the right people and equipment to complete work the first time**
- ▶ **Fix problems before customers even know they have them**
- ▶ **Improve technician efficiency to meet SLAs**

Let's see what these capabilities look like in more detail...



*TRIMEDX uses ServiceNow Customer Service Management and Field Service Management to rapidly route and resolve more than 175,000 cases each month, related to 78,000 different types of devices. Cases now automatically flow in to work orders, as they move from call center agents to the right technicians based on their skills and location.*

**LEARN MORE**

► **Send the right people and equipment to complete work the first time**

Fix problems before customers even know they have them

Improve technician efficiency to meet SLAs

Best practices

## Complete work the first time

Customers would prefer nothing ever goes wrong, but if it does, they want to have it fixed as smoothly and quickly as possible. They want scheduling control and visibility into the field service visit. And they want the technician to be prepared to do the job the first time.

If you can schedule technicians with the right skills and parts for the task, you can help ensure the job will be completed correctly the first time. To pick the right people for the right job you need:

- Complete visibility into open tasks and technician information, so work orders can be efficiently managed and the ideal technician assigned based on proximity, availability, priority, parts on hand, and the specific skills required.
- Dashboards that give dispatchers real-time visibility into technician progress so they can easily view status and location at any time and monitor SLAs.
- Automated scheduling to assign tasks to the best available technician and free up dispatchers to handle urgent requests and exceptions. Reschedule work automatically if a technician is falling behind to keep SLAs on track.
- A 360° view of the customer by connecting field service and customer service. Not only does this equip your field service technicians with information on the customer's history, it ensures the customer experience is seamless—from initial contact with customer service to the field service visit to follow up.



Send the right people  
and equipment to  
complete work the  
first time

► **Fix problems  
before customers  
even know they  
have them**

Improve  
technician  
efficiency to  
meet SLAs

Best  
practices

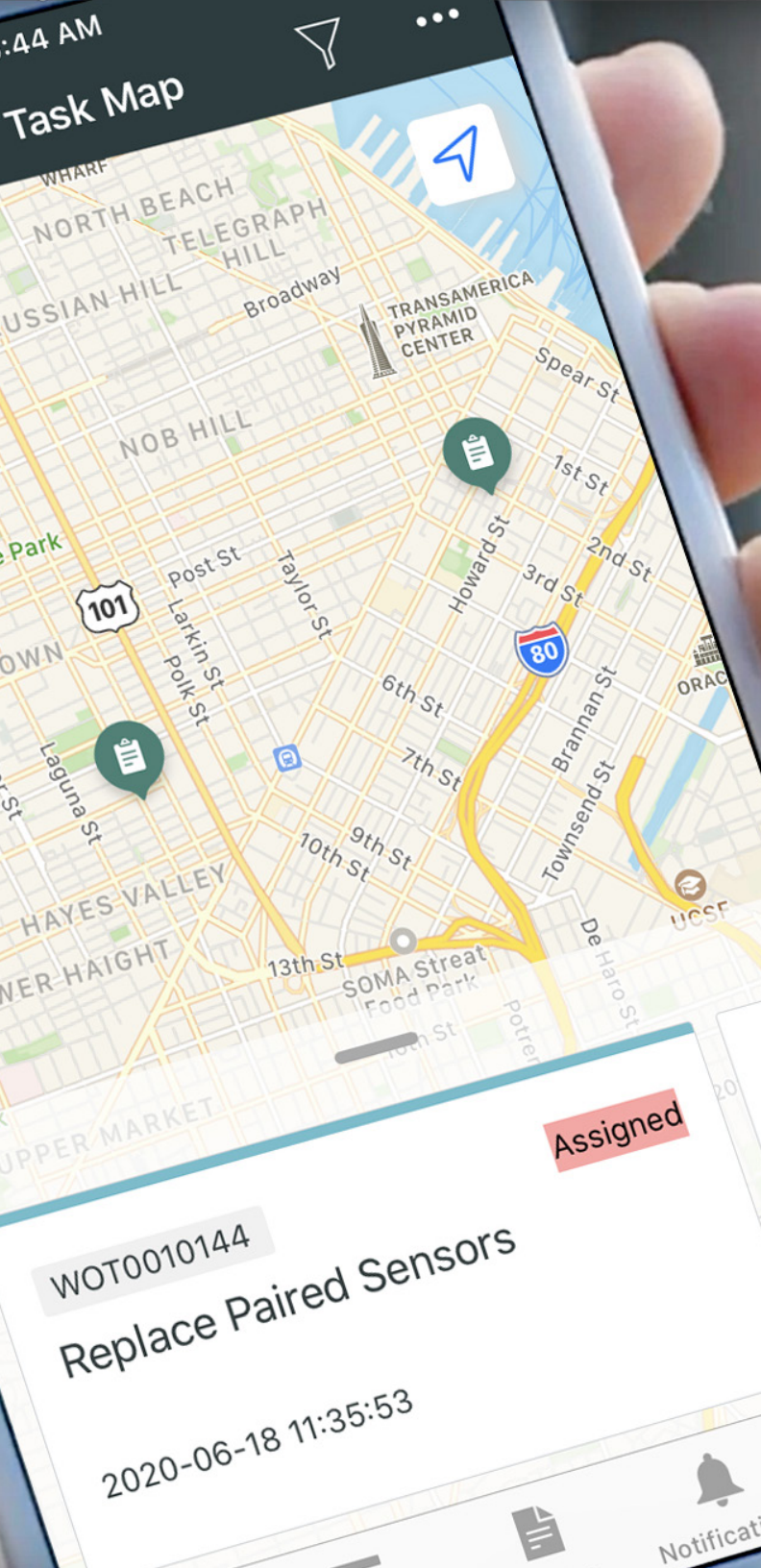
## Fix problems before customers even know they have them

Preventing issues before they happen is the best way to improve customer experience. Completing regularly-scheduled preventive maintenance helps ensure uptime. With IoT and intelligent technology to monitor customer systems, you can also create a work order to dispatch a technician as soon as a potential problem is identified. When that isn't possible, proactively notifying customers prevents unpleasant surprises and helps earn their trust.

To be able to fix issues before customers even know they have them, look for capabilities that can:

- Automatically schedule preventive maintenance, based on time or usage of an asset, to prevent downtime and improve the overall performance and lifetime value of that product or service.
- Deliver complete visibility into asset details and history to ensure comprehensive, proactive service visits and reduce truck rolls.
- Offer reporting tools that can help identify issues and trends, so steps can be taken to minimize customer impact and optimize technician productivity and efficiency.
- Notify customers of potential issues with built-in communication tools.





Send the right people  
and equipment to  
complete work the  
first time

Fix problems  
before customers  
even know they  
have them

► **Improve  
technician  
efficiency to  
meet SLAs**

Best  
practices

## Improve technician efficiency to meet service level agreements

Meeting service level agreements is key to maintaining customer relationships and avoiding service penalties. It becomes even more critical as some organizations move to outcome-based service models. Maximizing your technician utilization and efficiency can help ensure you fulfill your service contracts.

To empower your technicians, look for a solution that can:

- Provide a mobile application that gives technicians everything they need in the palm of their hands, even when offline. Technicians should have complete visibility into work orders, maps, knowledge articles, parts availability, safety checklists, asset history, and more.
- Optimize routes and schedules to avoid excess travel or technician downtime. Technicians should also be able to avoid unnecessary trips for parts by seeing everything they need for the day's tasks at once.
- Keep technicians safe and informed with instructions, knowledge articles, and checklists. Ensure correct procedures are followed by collecting feedback along with the work order debrief.

## Best practices

By transforming your field service organization, you can drive down costs while increasing customer satisfaction. Let's look at six best practices that will transform your company's field service:

### #1 Provide an effortless service experience

Give customers access to a personalized self-service portal to easily book and manage service appointments and visibility into the ongoing status of their requests. Deliver proactive communications to customers, including product notices or technician status.

### #2 Arm technicians with easy-to-use tools

Provide field service technicians quick and easy access to work order information, parts management, service history, and collaboration tools. Help them manage their tasks and schedules, as well as track travel and time worked in the field. When work is complete, provide the ability to capture and record the customer's signature for acknowledgment of completed work.

### #3 Connect field service to the entire organization

Ensure full visibility of customer issues across the entire organization by connecting field service, customer service, and beyond. When your entire organization is connected, the root cause of customer issues can be solved. Assign tasks to the appropriate personnel in other departments and track status to ensure complete and successful resolution.

Send the right people  
and equipment to  
complete work the  
first time

Fix problems  
before customers  
even know they  
have them

Improve  
technician  
efficiency to  
meet SLAs

► Best  
practices

### #4 Optimize resources and scheduling

Assign work to technicians automatically based on proximity, availability, and the specific parts and skills required. Provide dispatchers the ability to easily modify assignments, track SLAs, and manage exceptions. Support onboarding and project rollout with structured project management. Track and manage simple to complex work orders that involve individual technicians or teams of people completing tasks in sequence.

### #5 Maximize uptime through maintenance

Automatically schedule preventive maintenance to avoid costly break-fix work. Create schedules for each asset based on time or use to ensure maintenance is completed on time and to avoid service interruption and meet SLAs.

### #6 Monitor and improve team performance

Use analytics, reports, and dashboards to track team performance and identify bottlenecks. Get insights from measuring technician utilization and capacity, first-time fix rate, and work order data such as assets, customers, locations, time, and cost.





## Introducing ServiceNow Field Service Management

ServiceNow® Field Service Management helps companies efficiently manage location-based work. Customers can use online appointment booking to select the date and time most convenient for them. Dynamic scheduling automates the assignment process, basing it upon skill, travel time, priority, and technician availability. Central dispatch additionally allows dispatchers to easily modify work assignments using a drag-and-drop interface.

Field Service Management works seamlessly with ServiceNow® Customer Service Management and IT Service Management to connect customer service and the helpdesk with field service processes. Integrate to ServiceNow® Project Portfolio Management to link project tasks to work orders to assist with managing installation or deployment projects in the field.

Technicians can use the mobile application to quickly view task information, track time spent on work or travel, and record the customer's signature for acknowledgment of completed work. In addition, they can optimize routes for their day's tasks and get directions via popular map applications. They can also easily source and track parts used, follow checklists, and access knowledge articles on-the-go.

Field Service Management includes the ability to plan maintenance, replacing costly and reactive break-fix work with a more proactive approach. Preventive maintenance is automatically scheduled based on the asset to improve uptime and meet SLAs. Get insight into potential failures before they happen using ServiceNow® Operational Intelligence and the Internet of Things (IoT). Proactively monitor equipment to prevent downtime or notify customers of issues.

Managers can easily customize reports and dashboards to gain real-time insight into first-time fix rate, utilization, capacity, and improvement opportunities.





# Improve your customer experience with modernized field service management

[LEARN MORE](#)

## About ServiceNow

ServiceNow (NYSE: NOW) is the fastest-growing enterprise cloud software company in the world above \$1 billion. Founded in 2004 with the goal of making work easier for people, ServiceNow is making the world of work, work better for people. Our cloud-based platform and solutions deliver digital workflows that create great experiences and unlock productivity for more than 6,200 enterprise customers worldwide, including approximately 80% of the Fortune 500. For more information, visit [www.servicenow.com](http://www.servicenow.com).

© Copyright 2020 ServiceNow, Inc. All rights reserved. ServiceNow, the ServiceNow logo, and other ServiceNow marks are trademarks and /or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company and product names may be trademarks of the respective companies with which they are associated.

[BACK](#)

SN-EB-FIELD-SERVICES-072120