ORACLE

Making Sense of Field Service Knowledge and Collaboration

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✴ **Spark Series**

What is field service knowledge and collaboration?

Equip your service team with the information and support they need to assist customers anytime, anywhere.

Your field service technicians are the face of your company. Make sure they have the real-time knowledge-sharing tools to help them provide exceptional customer experiences every time.

Both field service knowledge and collaboration impact several teams in your organization. First, there are your field service technicians— the mobile employees who work onsite to resolve issues and perform installations, inspections, and maintenance. Then there are the folks who dispatch, coordinate, and support your team members out in the field. And of course, it's also integral to your contact center managers and service agents—the ones fielding the initial customer requests.

The practice of knowledge and collaboration helps each of these groups support your customers more effectively.

- **Technicians can resolve customer issues** more quickly

- **Dispatchers can offer support** across a large, distributed field workforce

- **Service agents can easily identify, direct, and escalate** customer issues

When you provide exceptional field service, you're driving higher customer satisfaction and retention. But that requires a highly knowledgeable team that shares information and works together to support customers. This guide covers how knowledge management and team collaboration can set you up for field service success.

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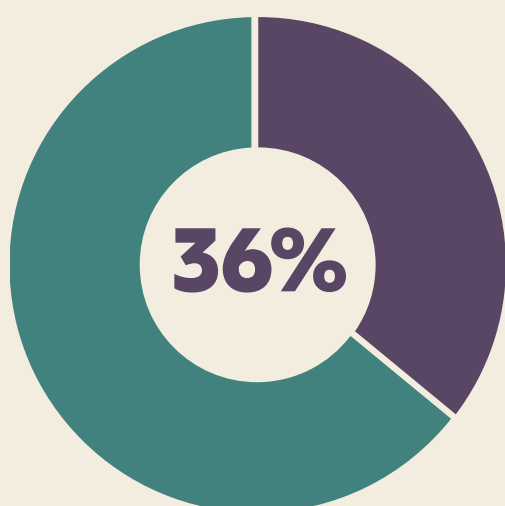
Only 36% of organizations link knowledge to action that drives value.[1]

Why it matters today

Field service technicians are retiring in droves, and a new generation of workers with little experience and institutional knowledge is taking their place.

Inexperience is expensive. The bottom quarter of the workforce—defined as junior employees and low performers—costs organizations 80% more in service expenses than the top quarter.[2] Inversely, if everyone's performance were on par with the top quarter, organizations would save 38% on service costs.[2] In the field service industry, training new technicians can be especially challenging, with changing customer expectations and increasing product complexity. By tackling this challenge and bridging the knowledge gap, you'll maintain service consistency, improve first-time fix rates, and deliver rewarding customer experiences.

Digital knowledge management offers the scalability and flexibility to give your team members what they need for training, safety, and collaboration, no matter where they are in their careers.

With real-time information and insights, your field service technicians will be able to meet and exceed customer expectations. Plus, knowledge management can:

- **Capture, preserve, and pass information** from existing field service workers to the next generation

- **Improve employee retention and satistaction** by giving them support tools to be successful

- **Remove information** siloes to streamline operations and business processes

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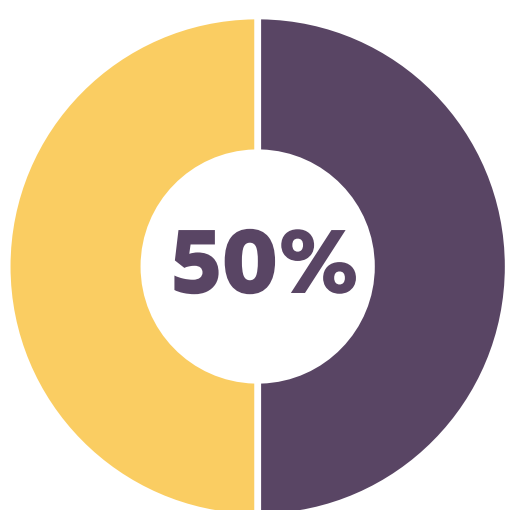
Knowledge management can have a huge impact on technician performance and productivity, reducing mean time to repair by as much as 50%.[3]

The basics

Knowledge is your company's secret weapon.

Effectively sharing knowledge affects almost every corner of your business, from customer service and employee onboarding to uncovering insights and creating new products and services. When employees leave, they take a wealth of knowledge with them. That's why it's critical that your employees share their knowledge and skills with their successors. Examples include:

- Workforce experiences and skills

- Product and service designs and processes

- Market, customer, and technical data

- Plans for new products or services

Some of this knowledge is shared by word of mouth, as colleagues work together. But there are also more formal and scalable ways of sharing knowledge that can be preserved, including:

- **AI-assisted guidance via chatbots**

- **Internet of Things (IoT) data**

- **Internal knowledge bases,** such as:

  - Documents (manuals, frequently asked questions, etc.)

  - Step-by-step process guides

  - Introductory articles

  - Video demonstrations

  - Glossaries and definition lists

Collaboration tools are key to disseminating these knowledge sources and connecting your employees with each other on both a one-to-one and one-to-many basis. You may use:

- Text chat (either group chat or between individuals)

- Video chat

- Internal messaging software

- Customer and employee self-service portals and workflows

- Community forums

- Augmented reality (AR) remote collaboration

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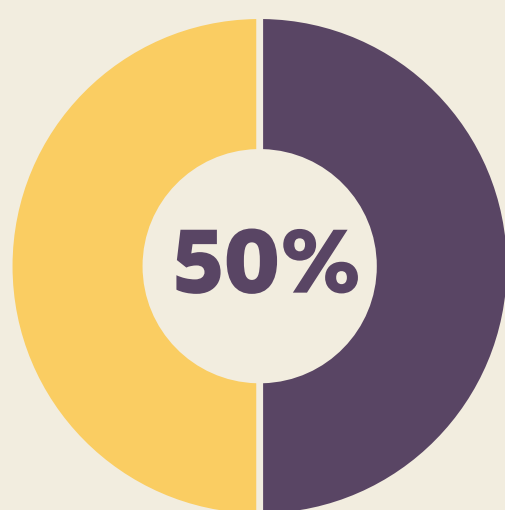
By 2025, over 50% of field service management deployments will include mobile AR collaboration and knowedge-sharing tools, up from less than 10% in 2019.[4]

Let's explore how these tools apply specifically to field service. Imagine a new technician is helping your customer onsite. She runs into an equipment issue that wasn't covered in her training, so she searches the knowledge base (KB) and finds numerous relevant articles. One of them features an embedded video that helps her perform the repair.

Seeing how knowledge and collaboration relate to field service, it's easy to understand how they can affect key field service success metrics, including:

- **First-time fix rate (FTFR):** how often an issue is fixed on the first try

- **Cost per success (CPS):** total finance cost required to successfully close a sevice ticket

- **Mean time resolution (MTTR):** average time it takes to resolve to a customer issue

- **Mean time between failures (MTBF):** average time between customer issues

- **Mean time between visits (MTBV):** average time between the visits you make to service an asset or customer

What's next?

Level up your field service with up-and-coming knowledge management technologies.

Exciting new technologies are emerging that can help boost your knowledge and collaboration to differentiate your company from competitors. Exceptional service creates happy and loyal customers, but the advantages don't stop there. By making the right investments, you'll also improve the performance of your workforce and help attract and retain the best talent with:

- **Digital unification:** invest in end-to-end solutions that bring together all data and processes on a common platform

- **IoT:** use data from smart/connected assets in the field to prevent equipment failure and identify issues more quickly

- **AI-guided repair:** tap into contextual clues from service requests, customer details, and more to create next-step recommendations for field service technicians

- **AR:** enable your service teams to use live video, <u>digital twin</u> simulators, and other tools to provide remote, contactless support to customers and technicians

- **Wearables:** provide smart glasses, head-mounted displays, and even smart watches to arm field service technicians with contextual information and allow dynamic collaboration with other field team members or back-office support

- **Outsourcing:** expand coverage areas, fill staffing gaps, and reduce operational costs by allowing third-party service organizations to compete for your business; with robust knowledge and collaboration tools, subcontractors can perform service with the same consistency as your in-house technicians

- **Drones:** use drones with live video feeds to broadcast footage and more safely diagnose issues in hard-to-access or elevated areas (such as towers or building roofs)

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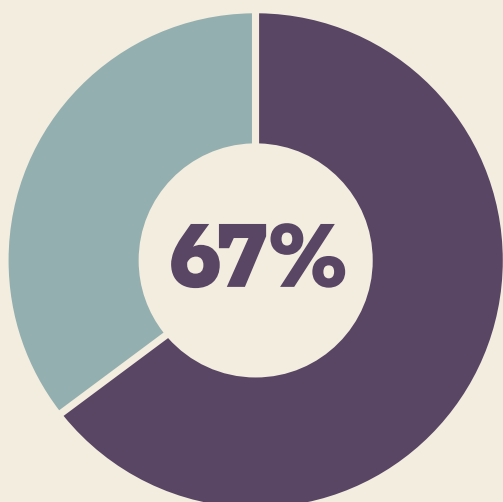
67% of organizations have yet to incorporate AI into their knowledge management strategy beyond a limited extent.[1]

A view toward practical solutions

Knowledge and service go hand in hand.

Knowledge is the key to helping your customers, but no one knows everything. That's where knowledge sharing and collaboration come in. Now that you understand the basics, look for opportunities to continue elevating your field service

Eliminate barriers and bottlenecks. Survey your service organization to understand what information is difficult or impossible to find and identify areas where communication isn't working. Prioritize by eliminating the most impactful barriers first, and share updates with all your teams so they know when new information and tools become available.
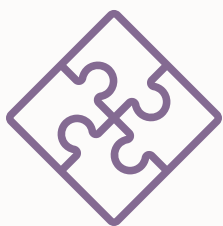
Convert your organization's knowledge into transferable information. Combine this with your own service data to create a dynamic platform for everyone. Deploy technology that makes it simple to capture and preserve knowledge in the moment, wherever service is performed.

Create teams instead of silos. Make it easier for your staff to work together with collaboration tools accessed inside field service applications. Tap into the field service trend of moving senior technicians into remote support roles while junior or new onsite technicians start video chats directly with their "pod" leader.

Integrate systems for a complete view of customers: Connecting front- and back-office data sources ensures that your field workforce can access customer service history, billing, contract, asset, supply chain, compliance, and other critical details needed to service customers when and where they need it.

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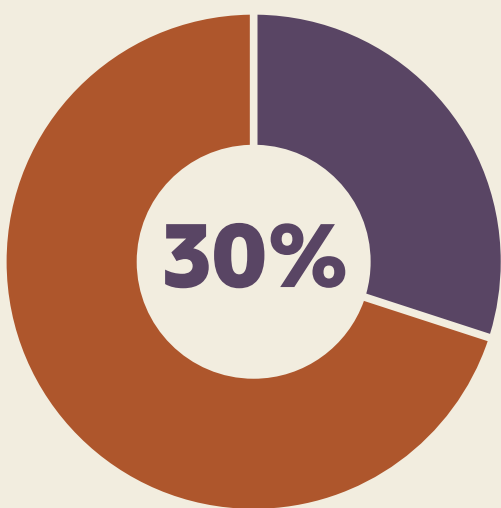
Online collaboration tools and digital workplaces can help boost productivity by up to 30%.[5]

To the experience-maker who's always moving forward

At Oracle, we know great experiences come from great inspiration, and we're providing the spark for your next idea. Packed with powerful info, the Spark Series will get you up to speed on core CX concepts—such as field service knowledge and collaboration—quickly.

Think of it as a way to hone your understanding before turning your eyes toward a new strategy. Because if anyone's going to create CX gold, it's you.

What will you discover next?

- [eBook: Essential Strategies for Field Service Management](#)

- [Blog: How to Unlock the Value of IoT-Enabled Customer Service Experiences](#)

- [Quick Tour: Oracle Field Service](#)

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Sources

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