

ORACLE

Essential Strategies for Field Service Management

 **Ignite Guide**



A TEN-MINUTE READ



Empower growth with digital field service management

A successful field service management strategy embraces digital to maximize efficiencies and connect the mobile workforce to customers and the back office. This type of transformation enables tremendous growth opportunities in worker productivity, customer satisfaction, and your bottom line.

Field service organizations respond to digitally savvy customers' ever-increasing demands by providing options they've become accustomed to in their personal lives. This shift from analog, manual processes to digital processes will fuel field service delivery in the future. Moreover, digital ensures a competitive advantage against disruptors that try to erode market share.

Field service continues to evolve into a more digitally powered line of business. Failure to embrace change will impact all aspects of the business, from a fragmented customer experience to inefficiencies that increase costs and make you less competitive.

This guide outlines strategies to forge more proactive field service management that balances efficiencies with rising customer expectations—while making service processes more profitable.



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Field service management, defined

Field service management refers to a company's mobile workforce—the front-line employees we deal with every day. We rely on these professionals to do everything from connecting our cable to checking our water meter to maintaining a fleet of rental cars. Field service engagements can be categorized in four ways.



Reactive: A customer-initiated request via phone, chatbot, website, or mobile app.



Proactive: The maintenance of an asset before a customer even knows about a problem.



Asset-based: The direct management of devices, machinery, equipment, appliances, etc.



Outcome-based: A focus on results vs. the more traditional break-and-fix models of the past.

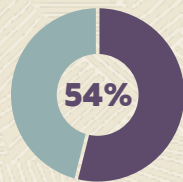
Like many disciplines, field service was already ripe for digital disruption. The global pandemic accelerated change to include contact-free customer engagements, while still providing customers the option to visually track a mobile worker in real time. Consumers and business customers use field service to complete work or service orders with a company they do business with, but the delivery of this work constantly changes and varies. By understanding customers across every interaction, field service has the power to transform into a customer-focused line of business with the power to maximize loyalty, revenue, and customer lifetime value.



Build your foundational strategy

B2B and B2C consumers expect a seamless customer experience—and field service management plays a critical role. With mounting internal expectations as well, a huge opportunity exists to leverage a new digitally native workforce to fast-track digital transformation.

There are five perspectives that most companies consider when developing a comprehensive strategy. Each works in concert with the others to provide a balanced plan your company can execute to realize positive outcomes across the business.



54% of field service organizations claim a revamped customer engagement solution that helps maintain or enhance relationships with customers is a priority for their next software initiative.

1. Customer preferences and expectations

Every customer engagement differs, including customer expectations about field service outcomes. Take a stakeholder view of both B2B and B2C customers to understand how to deliver proactive field service engagements—and pay special attention to changing trends and tactics.

2. Financial opportunities

We've heard a lot about enabling our teams across business lines to maximize revenues. By providing everyone—from internal service teams to our mobile workforce—the ability to access all aspects of a customer account, they can respond to any request. Field service organizations need the right balance to deliver on core goals and drive revenue.

Best-in-class field service organizations that adopt analytics technology see an:

+18% increase in service profit

+42% increase in customer retention rates

+44% increase in service-level-agreement performance



Build your foundational strategy

3. Innovation

Technology enables transformation in field service organizations. By executing on a comprehensive strategy, organizations manage customers' and employees' future needs—while providing the backbone to promote growth. Take inventory of your customer experience and your competitors; conduct an internal gap analysis on your ability to execute; and make machine learning, artificial intelligence (AI), mobility, and contact-free and remote service a strategic priority.

4. Changing employee demographics.

When your most experienced field resources retire or change careers, onboarding skilled field service workers can prove challenging. Technology can make or break your onboarding experience, but the right mix of training and tools geared toward digitally savvy recruits can set the stage for delivering exceptional service.

5. Buy-in across lines of business

Most strategies succeed with strong executive and line of business buy-in from the start. Push your strategy forward by looking beyond your field service team to establish partnerships across other lines of business, including sales, marketing, and service teams.



Five steps to get started with field service management

01

Understand the competition and market disruptors

The process of building a field service management strategy can reveal revenue opportunities you didn't know existed. In addition to understanding your direct competition, take inventory of disruptors that erode market share with similar options.

02

Talk to sales and marketing leaders

Gain a clear view into what the market says about your company compared to others. Are you considered a leader? Are disruptors carving out market share at your expense? Are competitors expanding their services in new and innovative ways that your management hasn't considered?

03

Analyze the comprehensiveness of options you deliver

Are you equipped to deliver on customers' changing expectations? If you answer no to delivering on proactive, predictive, or preemptive field service, your business may be at risk.



Five steps to get started with field service management

04 **Discuss your technology roadmap with IT**

To understand the business pressures IT leaders face, ask about plans to upgrade the technology infrastructure or experiment with emerging technologies. Additionally, talk about the cost of technical debt to meet minimum requirements and deliver on new capabilities.

05 **Establish clear project champions**

Take inventory of the lines of business your new strategy will impact and make those connections early to maintain momentum as you execute. You may also want to analyze the customer journey to identify areas of friction that can be minimized or eliminated as you work with new stakeholders to move your strategy forward.



Monitor and optimize your end-to-end field service experience

With a proactive field service operation, you'll be able to deliver a user experience that drives the business. As you set out, keep these takeaways in mind.



1. Customer data is at the heart of field service

Increase profit by delivering any type of field service engagement. Most importantly, get the data needed to provide proactive and outcome-based field service.



2. A complete customer view enables better service

Beyond the field service engagement (upselling, service changes, and other account-related inquiries), a view of the entire customer journey allows your mobile workforce to exceed expectations.



3. Employee training prevents frustrated customers

To increase first-time fix rates, ramp up new resources quickly through seamless access to help documents, knowledge, guided workflows, and other key training resources.



4. Visibility sets realistic expectations

Provide open line of sight for every engagement by giving customers access to all aspects of your mobile workforce—location, status, expected arrival times, etc.



Monitor and optimize your end-to-end field service experience



5. Streamlined processes maximize value

Create efficient processes that leverage AI and machine learning, especially those related to scheduling and routing, to ensure every mobile resource runs as efficiently as possible.



6. Enhanced collaboration creates opportunities

A strong working relationship between mobile teams expedites service and minimizes downtime through shared knowledge of known solutions to common or unique customer challenges.



7. Expanding your revenue base increases profit

When extra capacity exists, looking beyond your traditional business model instead of reducing the size of your mobile workforce expands your field service footprint to other industries.



Deliver a modern field service management strategy with Oracle

Harness intuitive, AI-powered tools for routing, scheduling, and managing field service technicians.

Want to know more?

The screenshot displays the Oracle Dispatch Console for user ARNDT, William. The interface includes a search bar, a list of favorites, a list of technicians, a map with a route, and a list of scheduled activities.

Dispatch Console | ARNDT, William

Friday, February 26th, 2021

Search: Name or ID

Favorites: Florida, Nearby, Southern MD

Technicians: ARNDT, William (3/11), BASILE, Terri (3/4), BOVE, Leticia (0/0), DISNEY, Kathleen (3/12), HOLM, Billy (3/12), KILBURN, Norman (3/10), LYNCH, Kevin (3/12), MCGEE, Jeffery (4/11), ORDONEZ, Allison (3/12), PEAKE, Lynda (4/9), PEARSON, Kay (3/10), REINER, Fannie (3/10), RICKERT, Peter (3/13), RIDDICK, Mike (3/12), ROWLETT, Martin (0/0), SANSONE, Glenn (3/10), STAMEY, Janie (0/0), VALENTINO, Dennis (2/11)

Map: Shows a route starting from Orlando Sanford International Airport and visiting various locations including Lake Jesup, Spring Hammock Preserve, and Oviedo. A pop-up window displays location details: Time: 09:46 AM, Coordinates: 28.64213, -81.24057, Accuracy: 20 m, Speed: 96.49 km/h, Resource left the activity location.

Scheduled Activities:

- Assisting
- Lunch break - Lunch break
- 06:52 AM - Warehouse Activity
- 07:52 AM - Premium - 1003 GREEN BRANCH CT - Cooling Maintenance - 08-10
- 08:31 AM - 990 VICKI CT - Cooling Maintenance - 08-10
- 09:30 AM - 202 PINEFIELD DR - Commercial Facility Maintenance
- 10:12 AM - 200 W 16TH ST - Water Heater Maintenance - 10-12
- 10:59 AM - 2618 MOHAWK AVE - Commercial Facility Maintenance - 10-12
- 11:53 AM - Lunch break
- 12:55 PM - 213 COACHMAN CT - Water Heater Maintenance - 13-15
- 01:47 PM - 3105 STONEBROCK DR - Water Heater Maintenance - 13-15
- 02:51 PM - 133 Venetian Bay Circle - System Overhaul / Install - 13-15
- 03:50 PM - 1175 Vineland Pl - Commercial Facility Maintenance - 15-17



To the experience-maker who's always moving forward

As modern customers seem to shape-shift from one moment to the next, it's critical to maintain pace with their expectations. To help, we created the Ignite series to fuel your continuous pursuit of customer experiences that always hit the mark.

Guides like this one on field service management aim to advance your expertise and help you craft foundational strategies in less time. So you can get back out there to captivate customers and drive revenue.

What will you discover next?

- [Making Sense of Visual Engagement](#)
- [Essential Strategies for Digital Customer Service](#)
- [Essential Strategies for Customer Data Management](#)



About Oracle Advertising and CX

Make every customer interaction matter by connecting all your business data across advertising, marketing, sales, commerce, and service. Oracle Advertising and Customer Experience (CX) is a connected suite of applications that goes beyond traditional CRM to help you create and nurture lasting customer relationships. Build a complete view of every interaction and every customer, no matter how and when they engage. Empower your entire business to deliver exceptional customer experiences—from acquisition to retention—and everything in between.

Sources

1. [“The Operations Guide to Connected Devices,” WBR Insights, 2020](#)
2. [“Get Smart: Business Intelligence and Analytics for Service Organizations,” Aberdeen Group, accessed on March 19, 2021](#)



oracle.com/cx/

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