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Reimagining Field Service

Management Systems for Tomorrow's Needs

White Paper

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The State of Field Service Management (FSM)

Field Service Management (FSM) was always critical to industries like Hi-Tech Manufacturing, Oil & Gas, Energy and Utilities as a primary way of supporting their core product. Today, FSM is under the spotlight as a driver for new business models, with companies looking to strengthen their customer experience and venturing into servitization. That's why the FSM market is growing at a healthy pace of 11% CAGR, crossing $5 billion by 2025.1

At its core, FSM is the management of a company's resources at or en route to the customer's property, rather than on company property. This covers both human and physical assets, such as locating vehicles, assets, scheduling work, managing employee activity, and ensuring safety during service operations. At the same time, it also means integrating these activity pipelines with inventory, billing, accounting, and other back-end systems.

Traditionally, FSM relied on legacy technologies that would hold enterprises back from tapping into emerging opportunities. For example, deviation from pre-set schedules would be nearly impossible, making it difficult for companies to scale without notice. In the last few years, there has been a push towards digitalizing FSM processes and infrastructure to bolster business outcomes.

This ranges from core transformation, like the adoption of cloud applications for anytime-anywhere access by field workers, to cutting edge add-ons like implementing Augmented Reality (AR) and Virtual Reality (VR) to simulate knowledge resources on the field and speed up Mean Time To Repair (MTTR).

Another thing to consider is that Digital Field Services cannot work in isolation and must have smooth interfaces with CRM tools, internal employee management and platforms, data and analytics systems, partner portals, payment/revenue systems to function optimally.

Salesforce has a unique position in the market as it has dedicated products for each of the service lines. When it comes to cloud applications, Salesforce has a comprehensive solution in their Field Services Management (FSM) suite. Real-time visual support, faster call resolution, automated scheduling, customer updates, tools to boost on-field productivity – the suite has capabilities in all these aspects. Salesforce's Digital Field Service Solution can also help clients with smoother integration into the adjacent internal or client facing systems as well, for enhanced synergy. This makes the Salesforce Field Service Management suite a great choice, helping them feature in the "Leader" quadrant in the Gartner Magic Quadrant for Field Service Management.

As we take you through the Field Services Management landscape, the challenges, opportunities, and considerations, we will also highlight how Salesforce steps in to go beyond FSM to connecting all related processes, making your field servicing more seamless and productive.

4 Critical Challenges for FSM in the Digital Era

It shouldn't come as a surprise that service leaders name digitization as their highest priority for the next 12 months, given that it would optimize people management, reduce costs, enable better labor utilization, and improve profitability. FSM functions are turning to digitization to address the following challenges:

The reactive nature of existing systems

Most servicing systems are stuck in a reactive mode, responding to a customer query or issue after a significant lapse of time. A major challenge for FSM functions is to achieve a preemptive stance, where the enterprise can predict servicing needs, anticipate bottlenecks, and orchestrate the resources accordingly.

Salesforce FSM addresses this with the ability to track asset maintenance schedules and associated service contracts so that a preventive maintenance schedule can be maintained for these assets. Preventive maintenance scheduling also calls for allocating and scheduling resources including field engineers, tools, logistics, parts for replacement etc., which can be effectively managed using Salesforce FSM.

Dependence on human efforts and physical proximity

FSM continues to rely hugely on human agents and knowledge workers to deliver support services on time. This lack of automation and the absence of touchless technology impedes agility, particularly in scenarios like COVID-19. As the global economy adapts to these new conditions, companies find it challenging to support their customers while adhering to travel restrictions and social distancing protocols.

IoT becomes the key to deliver field service management in the post COVID scenario, as it enables remote monitoring and diagnosis to track asset performance. Integrating IOT data into Salesforce FSM can help track asset performance and initiate field visits in case any service intervention is needed. Automation of asset performance monitoring, tracking, issue identification, case creation and escalation will help augment interventions where there is lack of time and physical proximity.

Augmenting Experience Transformation

The average consumer today has very different expectations from their service provider than they did a decade ago. Low quality of experience is, therefore, out-of-sync with the consumerized world. E-commerce, online banking, and even telehealth have shrunk the expected MTTR more than ever before, placing immense pressure on field service providers.

Salesforce helps relieve this pressure by connecting partner ecosystems with automation, to manage complex service processes. Salesforce Commerce cloud, for example, can be leveraged for ordering parts for scheduled maintenance. Salesforce enables e-signature partners for job debriefing closure with

customers, payment gateway integrations for onsite payment options in online or offline mode and integration with knowledge base for customer self-service on technical documentation and resolutions. The connected journey it creates helps rapidly scale customer experience and satisfaction.

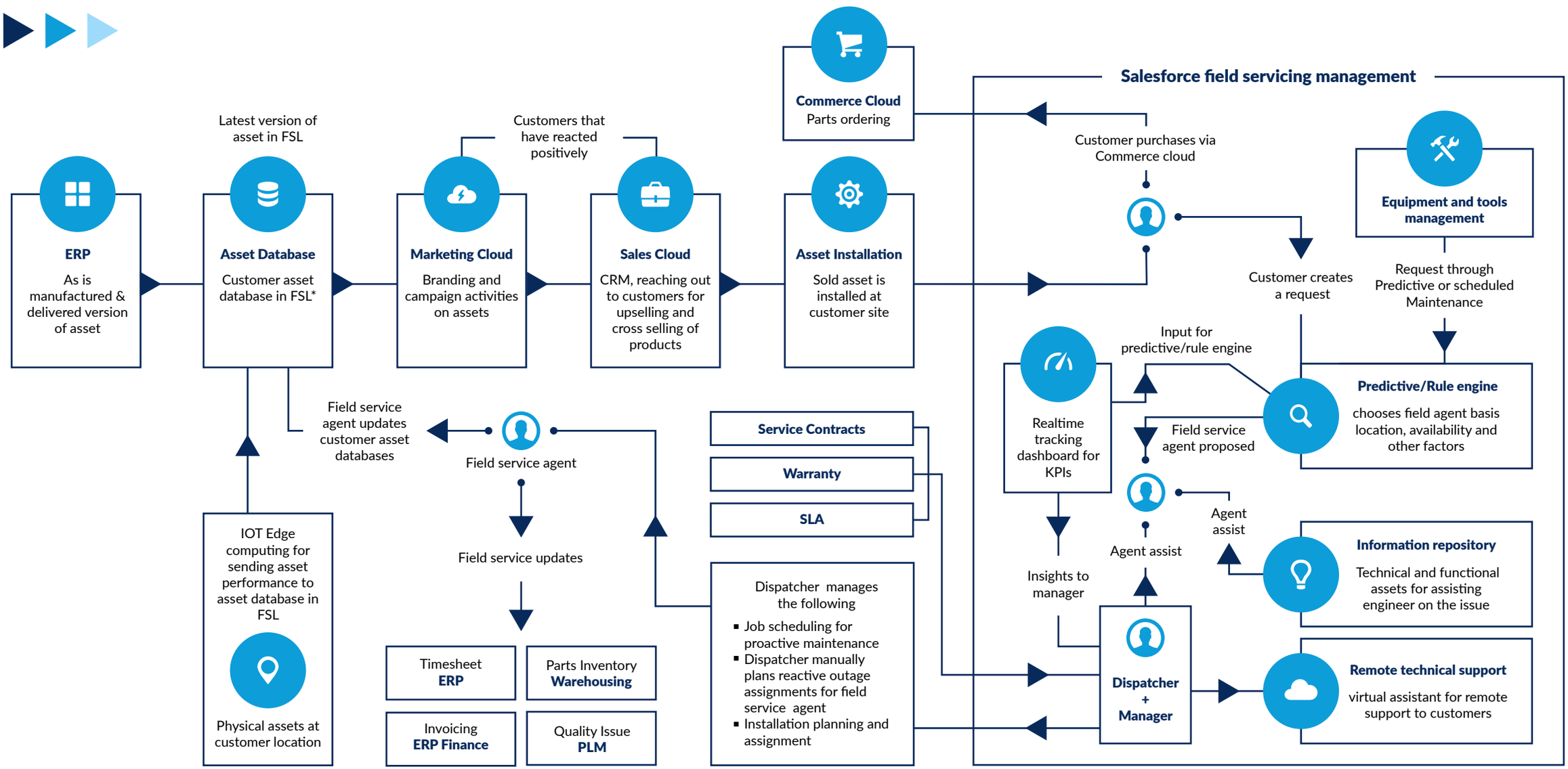
Asset Centric Approach - Lost opportunities in cross-selling and upselling

Companies that provide superior experiences gain a competitive edge. On the other hand, laggards encounter challenges when trying to cross-sell, up-sell, and increase customer lifetime value. Lost opportunities arise when FSM providers do not anticipate monetizable service opportunities on time.

Monetizing the asset database is key to augment service revenue in today's world. Salesforce FSM helps create a centralized asset customer database with "as is" product configuration, which is not possible with an ERP-based Installed base information. The asset information in Salesforce is real-time and relevant for any further action, as the Salesforce asset database is continuously updated for repairs conducted, configuration changes made, parts replaced, controllers added etc. Companies can check this asset database to understand which asset is performing sub-optimally, using replacement and upgrades required as cross-sell and up-sell opportunities.

Asset database in Salesforce, thus, also becomes a gold mine to harness the information for cross-sell and up-sell campaigns, which marketing teams can take up, as long as data is accurate and maintained upto date.

So you see how Digital FSM is essential, if companies are to overcome these challenges and come out on the winning side? Read on to know how the latest technology advancements open up a world of possibilities for modernizing service delivery in line with digital era needs, current customer expectations, and specific requirements arising from COVID-19.



*FSL: Field Service Lightning

Technology Stack Necessary to Revolutionize FSM

There are several measures enterprises can take to improve service delivery, both by modernizing the back-end and empowering field workers. Technologies like artificial intelligence (AI) and next-gen customer relationship management (CRM) would provide predictive capabilities at the back-end. On the field, employees can use wearables, IoT sensors, and Bring Your Own Device (BYOD) interfaces to increase their flexibility, preparedness, and on-ground knowledge. Some of the important areas to note include:

Preemptive service requisition

A combination of IoT-enabled equipment, social media data, and sophisticated analytics can help get out of the existing reactive mode in FSM. When data is fed into an AI-enabled customer intelligence engine, it can request a service even before the customer faces any real pain point.

Salesforce Einstein AI can be trained to analyze the IOT data to track asset performance. Any fluctuations of a technical parameter, or a set of parameters, can automatically trigger a service issue in the form of a case or a work order, with a recommendation for a field visit. This brings in a differentiated service experience, as it empowers resource dispatchers and service managers to act proactively rather than stick to a traditional “check and deploy” approach.

Augmented knowledge access

BYOD, AR, and VR allow field workers to seek assistance and access knowledge, while on the move, with minimal impediments. Smartphone-based AR can superimpose a layer of assistive information on physical equipment, helping to achieve “first-time-right”. It also reduces employee training time.

Salesforce Trailhead, an employee skill development platform, is the way service employees can easily access technical documentation for the product they are going on-site for. Video calling with specialists can facilitate collaboration in case any specific skills are needed for resolution. Partners on Salesforce Appexchange, a third-party application marketplace, provide augmented reality solutions that can bring AR digital twins to the mobile device of the field agents, for further analysis and real-time simulation of the issue on the asset.

Predictive Customer Outreach

By surveying the intended audience regularly, enterprises will be able to predict new prospects and proactively reach out to them. The lifetime value of existing customers can be enhanced by uncovering latent opportunities through wearables, edge analytics, and embedded IoT sensors. Once again, this integrates with customer intelligence.

Driving marketing campaigns with Salesforce Marketing Cloud, based on asset performance, EOL, business dynamics, can help proactively engage the customers on opportunities. As clients evolve in the market due to acquisitions, process, customer preferences and technology maturity, there is a pressing need to anticipate their interests and buying patterns

Adaptive workforce scheduling

Enterprises can use geolocation and AI-based recommendations to optimize schedules for the best outcomes, automatically. Service managers would then be able to visualize the predictive outcomes of various scheduling options and make the most effective decisions.

Salesforce's acquisition of Mapanything has been relevant in this space where any dispatcher can identify technicians in close proximity to the customer sites and schedule their visits on the basis of location and other factors .Technicians can plan their daily work schedule effectively by optimizing their routes on the map to customer sites. Service managers can manage unplanned outages with ease by deploying technicians who are near the customer site with the help of technicians' geolocation.

Integration across the value chain

Technologies like fully functional Very Large Scale Integrations (VLSI) boards can help connect FSM's various aspects like simulation, sales, implementation, and servicing on a single platform. This gives business leaders greater visibility to drive smarter strategic decisions.

The above components can help overcome challenges arising from legacy FSM models and gain from an experience-centric world's opportunities. Particularly in 2020-2021, as some market peers struggle to adapt, digital-first leaders will be able to build lasting loyalty among the customer base. At the heart of this journey lies the ability to empower an FSM function's biggest asset – the service agent.

Integrated invoicing/Payment processing

Customer portals

Regulatory compliance measures

Opportunities for Brand Advocacy, Cross-selling, and Up-selling

A field service agent is uniquely positioned to drive additional sales revenue for the company. They have a physical presence at the customer's location and speak to them one-on-one, in person. This leads to a more personalized relationship than one which is provided by an app or over a telephone.

As such, a field service agent can be a very powerful brand advocate through his or her delivery of service and interaction with the customer. A pleasant servicing experience by him or her can foster strong brand stickiness in the customer. Not only this, but a field servicing agent has a strong technical knowledge of the product due to the nature of the job and a strong grasp on the customer's preference due to regular interactions. All this can be leveraged to suggest adjacent products and services to the customer.

A school of thought believes that the very reason field servicing agents foster a strong relationship with customers is that they are not "salesy" people and to the fact that they solve a problem the customer is facing. Thus, the field servicing agent's feedback can be leveraged by the sales team to deliver relevant products and services to the customer, leading to more focused targeting.

Salesforce FSM can help channelize customer intelligence by recording customer interactions in Salesforce, building a soft-intelligence database and utilizing it to drive a strategy to increase the customer sales. Saleforce FSM can equip field service engineers with tools that can access field job information easily on any device, help them uncover asset issues quickly and bring a faster turnaround with digitization tools and services. This will help augment the customer experience and foster the trust and relationship.

Sales teams interacting with the customer can access Salesforce to understand and share quick service turnaround time, service SLA met, asset performance issues recorded, to provide an informed view to the customer and have a more productive conversation, resulting in an enhanced customer experience.

Creat work orders from cases

Manager and monitor technicians

Scheduling and order managemant

Equipping Field Agents with Value Generating Information

It is impossible for agents to live up to customer expectations and enterprise standards if the necessary information is not readily available. Unfortunately, this can be extremely difficult in sectors like hi-tech and manufacturing and utilities, which deal with complex equipment, processes, and product landscapes. To achieve first-time-right, or at least meet the industry benchmark for MTTR, field agents need the following six information assets:

- Job location visualized in real-time, preferably using AR
- Promised ETA and predicted deviations as calculated by AI
- Customer information and contextualized updates
- Accurately labeled and optimally classified inventory lists
- Expected task duration updated in real-time
- Next-job details and a browsable daily workflow

All of this information forms the user-facing layer of a robust FSM system. To operate smoothly at the back-end, the information layer must have the requisite connectors with service management, billing, parts inventory, ticketing systems, and HR. It is advisable for FSM functions to develop a multi-faceted and robust application landscape with integrated software components addressing each of these modules. Additional plug-ins can sit on top of these core systems – e.g., bots that feed field agents with real-time alerts on customer status.

Salesforce FSM provides the client with a 360° view to service users and sales users ensuring the customer is serviced with the right set of information. This also ensures that accurate communication is shared with the customer. FSM brings in features like dispatching, skill management, inventory integration, timesheet, job debriefing, quoting and ordering, parts integration etc., which provides all necessary information and functionality to the engineer and dispatcher to initiate and dispatch for a job as well as close the service request with timesheet approval and invoicing.

Service contracts and entitlements maintained for a customer ensure that the customer is being serviced as per contract and charged appropriately, ensuring no revenue leakage or loss.

The Salesforce's FSM system also gives a robust planning tool for dispatchers to ensure optimal utilization of resources as well to the technicians who have visibility on the plan for the weeks ahead.

Ecommerce integration, with the help of Saleforce Commerce Cloud, brings in an additional benefit for customers to order parts proactively based on planned maintenance schedules

Vehicle/technician location Tracking

Job status updates

Route optimization and GPS navigation

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Considerations for Tomorrow: Where FSM is Headed

Updating the FSM technology landscape for the digital era is only step one. There is an incredible mine of potential from bleeding-edge advancements, such as the rise of drones that may one day enable near 100% FSM automation. Blockchain, which has only 21% adoption today, could gain widespread popularity owing to its transparent, immutable nature. These technologies will make forecasting more accurate, product maintenance entirely predictive, and scheduling a perfectly optimized task possible with minimal human intervention.

This could transform common use cases like providing on-field support for equipment in the hi-tech and manufacturing sector, dispatching additional parts, and collecting data (e.g., from electricity grids) for billing purposes. Nearly every industry relies on field services to some extent, which is why restricted movements in 2020 had such a massive impact on the global economy. Intelligent technology intervention could futureproof FSM and also help break new ground when scaling the business.

To discuss these ideas in detail and learn how Zensar how prepares the enterprise application landscape for the most vital service opportunities, please email us at **connect@zensar.com**.

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