2023 EDITION



FIELD SERVICE MANAGEMENT

THE COMPLETE GUIDE

Grow Your Field Service Management Understanding with Useable Insights and Actionable Tips



FIELD SERVICE MANAGEMENT EBOOK



INTRODUCTION

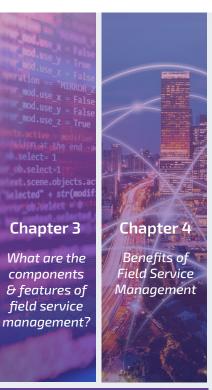
Field service management (FSM) technologies have revolutionised how companies can deliver service and the customer experience of that service. But what is Field Service Management, and how can the right solution help transform service organisations like yours?

In the past five years, the rate of change in field service has grown exponentially. Service organisations are making considerable progress in adopting innovative technologies, and the nature of field service has changed permanently.

This eBook will provide a comprehensive introduction to modern field service management, defining what field service management is, evaluating the current market trends and looking specifically at what FSM solutions can do for you. **Let's get started.**

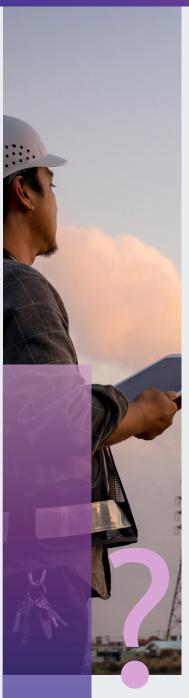












What is Field Service Management?

Using analogue, offline tools to manage your field service may no longer be competitive. Digital is increasingly the way to go, even if manual processes still have a place in your arsenal. Field service management (FSM) technologies enable organisations to automate and optimise every step of the service delivery process. Organisations like yours can now understand and control the planning, scheduling and execution of each step in the service delivery process, all while effectively managing a blended workforce to meet increasing demand.

What is field service management?

Field service management (FSM) is a process-driven approach to organising the different components of service delivery outside the office or 'in the field'. Field service management is about meeting your service demand by efficiently planning, scheduling, and executing every step in the service delivery process. From organising the people who will deliver that service to the interpretation and understanding of services delivered, each step is as important as the last and must be viewed as one interrelated process.

In the past, FSM activities were entirely manual; service managers lifted the phone to reach someone in the field; data was captured physically using paperwork or spreadsheets. Planning, executing and understanding service delivery was slow, with baked-in inefficiencies and unnecessary office admin for data entry, auditing and reporting. For many service organisations, this was and still is the norm.

What is field service management software?

Field service management (FSM) software is typically cloudbased software designed to help service organisations automate each step in the field service delivery process. FSM solutions often blend the service lifecycle with automation, analytics, and intelligence to provide real-time, accurate, and efficient data-driven insights. Capabilities often include work order management, workforce rostering, dynamic workforce scheduling, mobile workforce management, data analytics and business intelligence capabilities.

We will define in greater detail each of these capabilities in Chapter '3'.

But it doesn't have to be.



Why is field service management critical?

Modern field service management involves getting a lot of things right. Regardless of size or industry, field service organisations often share common strategic objectives. These common strategic objectives are essential to achieving success, and often include:



Increasing Workforce Capacity:

Service providers feel they are not completing enough jobs each day to meet demand. This can be due to service inefficiencies, staff attrition and other operational causes. This raises dependence on expensive third parties or places a strain on the existing workforce to meet demand, exacerbating the capacity issue. It's only natural that organisations are looking to increase workforce capacity and deliver services more efficiently.



Improving Service Compliance:

Costly missed SLA penalties, regulatory breaches and other associated fines are not acceptable in acompetitive landscape. This is challenging existing service models and encouraging adoption of compliant services that adhere to external regulations- and one's set internally.



Driving ESG Commitments:

Unnecessary journeys, excessive paper usage and high carbon output are barriers to achieving net-zero. Organisations now prioritise delivering services in an environmentally friendly manner both to meet Environmental, Social and Governance objectives and to offer a competitive differentiator in an increasingly green-focused consumer market.



Reducing Cost Base:

Rising operational costs due to higher fuel and transportation costs, staff attrition and associated overtime or agency costs are prompting organisations to seek more cost-effective operations and reduce their cost base.



Raising Customer Satisfaction:

Where service is poor, high customer churn follows. This decreases revenue and promotes poor brand association, slowing growth. Preventing this and meeting modern customer expectations is driving a step-change in service quality. The focus is now on service models which place the end-user at the centre.



Enhancing Staff Engagement:

In a post-COVID environment, a new world of work has emerged. Significant attrition and high replacement costs, poor staff morale and productivity presents a major challenge for service providers. Regular and effective engagement with staff offers an opportunity to retain and empower staff, in addition to new tools which enable universal information access and digitised training.

These are the strategic areas organisations are looking to deliver value within. However, they are areas where organisations are experiencing the most pain. So how are the forward-thinking companies meeting these pressures in field service? By riding the digital wave and mastering planning, scheduling, execution and analytics—delivering services when, where, and how their customers want it.

Let's look deeper at the key trends behind the shift in strategic objectives for service providers.





Current Situation:

Trends in Field Service Management

Innovation in field service management is no longer up for debate.

New challenges for service providers have made innovation a non-negotiable, from a rising cost base to constraints on profit margins driven by increased logistics costs, decreasing customer revenue and workforce shortages.

Trend **One**: Innovation is a Non-Negotiable

Across industries, field service operations are moving away from paper-based and manual processes. Service models which incorporate mobile working, the cloud, and integrated back-office processes are now being adopted. Advancements in technology are unlocking new possibilities for service models that create a culture of innovation and customer-centricity from the back office to the field through data sharing, access, and empowerment. The pandemic has only accelerated this transformation.

Digital transformation was always inevitable. Historically, technology played a subtle role for service providers, functioning mainly in the background. New challenges for service providers have made innovation a nonnegotiable, from a rising cost base to constraints on profit margins driven by increased logistics costs, decreasing customer revenue and workforce shortages. Field service organisations are empowered to innovate rapidly from disparate tech siloes to a service delivery process that embraces digital transformation from end to end. Here's how organisations like yours are achieving this:



IMPROVE JOB ASSIGNMENT



IMPROVE INFORMATION SILOS



IMPROVE DATA VISIBILITY



WHAT IS FSM

TRENDS





IMPROVE JOB ASSIGNMENT

Few processes are as unique to field service as scheduling jobs and routing your workforce. This uniqueness opens opportunities to gain a competitive advantage.

Individually assigning the most suitable technician to the right job involves understanding the real-time location or work status of your workforce and the schedule of appointments. With the correct solution, these tasks can seamlessly integrate and align with your CRM, workforce scheduling and work order management activities.

The correct solution gives management a real-time understanding of where your workforce operates, productivity, priorities, and SLA compliance. Data-driven decision-making at the point of service is now possible, maximising the available workforce capacity based on preference, skill level and location. Efficient routing and assigning the right people to the right job at the right time ensures work assignments are customer-centric and efficient from both a service level and an environmental level.

54% of mobile workers

reported lower personal productivity due to operational inefficiencies



IMPROVE INFORMATION SILOS

As the saying goes, information is king, and getting a 360-degree view of your service operations requires a single source of truth. Information silos, resulting from back-office systems failing to communicate, hamper your ability to take full advantage of your most vital resource- information. ERP, SCM, HR and finance systems rarely integrate.

Yet, all the most valuable information needed to deliver your services lives here.

77% of mobile workers

finish documents, proposals or presentations while on the road, with more than half finalising materials in the 11th hour.

Accessing this information with the correct solution offers a competitive advantage and lets you harness and utilise this information to its full potential. Auditing and compliance monitoring becomes seamless, and the ability to mine deep, accurate insights about your workforce operations and performance are now possible.

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IMPROVE DATA VISIBILITY

Collecting, updating, and analysing data is a complex—albeit crucial—endeavour, especially where manual processes are involved. As field-service operations become digitally transformed, companies will be presented with an unmatched proliferation of data: millions of terabytes per day, structured and unstructured, from a myriad of sources. That data is increasingly viewed as a value driver.

32% of mobile workers

admitted that they often make mistakes in critical documents while on the go.

Organisations are adopting technologies that increase data visibility across the entire service delivery process. Service models with real-time data collection and analytics break down barriers between the point of service and the ability to mine actionable insights. Reports can closely gauge how new technologies, training or rostering decisions affect service performance and provide timely insights to management. This enables them to react to workflow issues, customer service problems, and growth opportunities in real-time.

Data visibility, and the efficient workflows that enable it, can also reduce paper waste, reduce driving time, maximise office space, and decrease excess bloat in service operations and processes. This is a big win for moving towards sustainable operations.





Trend Two: A New World of Work

In the field service industry, a new world of work is emerging. From the government's Good Work Plan to the pandemic, finding and retaining talent with the proper technical, organisational, and customer service skills has never been more challenging. One reason is market growth. As the field service industry has grown, demand for skilled workers has outstripped supply.

Compounding matters is a talent pool ageing into retirement. Industry research reveals that 70% of service organisations indicate that they will quickly become burdened by a retiring workforce. In the same study, 50% of respondents reported that the current workforce capacity failed to meet service demand.

Together, this has led to fewer qualified mentors being available to train new starts as 100% of their time is spent delivering service. This results in too many inexperienced technicians in the field, causing a decline in productivity, lower first-time fix rates, increased customer dissatisfaction, and increased expenses on third-party agencies to fill gaps.

Fostering and retaining a talented, motivated service team requires investing in technology with the best knowledgeretention tools and professional support. Here's how organisations like yours are achieving this:





MANAGING THE BLENDED, DESKLESS WORKFORCE



IMPROVING WORKFORCE EFFICIENCY

Mobile employees are the face of your organisation. Without the support of backoffice teams, they cannot operate to their maximum potential and often waste time completing inefficient processes. Connecting your workforce to the correct resources and communication platforms can enhance service quality and is a key driver in employee engagement.

21% greater profitability

shown in groups with higher levels of engagement

Tools that share knowledge across an organisation are increasingly the cornerstone of successful service teams. Technicians equipped with this kind of service technology require less training from their more seasoned counterparts, boosting company productivity and helping improve the confidence of the individual.



MANAGING THE BLENDED, DESKLESS WORKFORCE

80% of the global workforce now works remotely. The ever-evolving factors within remote working can make managing your workforce even more complicated. While organisations with full-time, salaried employees have steady costs, those with a blended workforce—including full-time, part-time, contractor, desk-based, and deskless workers—face volatile labour costs.

The NHS Staffing Crisis

Read the Totalmobile blog

The complexity of a blended workforce requires solutions that efficiently and cost-effectively meet service demand and assure continuity. Digitisation is making it possible to manage a blended workforce. Flexible rostering and shift-planning allows companies to rapidly scale their workforce management to meet seasonal spikes in demand or unexpected business growth. Modern field service software is helping to optimise scheduling and reduce overtime, automating repetitive tasks and streamlines processes.

IMPROVING RETENTION & QUALITY OF LIFE

Finding balance outside of work is equally as crucial to the modern workforce. Employees, particularly millennials entering the workforce, seek more flexibility and control over their working hours. Many businesses operate with rigid legacy shift patterns that don't match varied demands or employee aspirations. These typically lead to elevated levels of overtime and limit the appeal of a career in field service. Flexibility in shift-planning and rostering practices are becoming the gold standard in working-time policies at top field service companies. If you would like to learn more, read our expertauthored eBook below.

Demanding Times: Shift Planning

Read the Totalmohile eBook

The key takeaway:

Combatting workforce disruption is prompting service providers across industries to invest in technology. The very act of embracing these innovative technologies can in itself play a significant role in resolving labour shortages. In the years following 2020, flexible working hours, training and empowerment and regular staff engagement are now critical factors for many. Joblist research found that over 30% of workers would sacrifice part of their salary for a better work-life balance, with better shifts and training opportunities prompting a step change in employee engagement





Trend Three: Rising Customer Expectations

WHAT IS FSM

Customer service is transforming from a cost centre to a driving force for growth. Forward thinking field service organisations are choosing a customer-centric approach to service delivery.

What is a Customer-Centric Service Model?

Studies reveal that 88% of customers view the service experience as of equal importance to the products or services. Customers now expect their relationship with B2B service providers to resemble experiences in the consumer world. They want a job done quickly, they want it done the first time, and they want to be engaged at every step.

Exceptional, tailored customer service drives engagement. Research by Gallup indicates that fully engaged customers contribute a 23% premium in wallet share, profitability, revenue, and relationship growth compared to the average customer. By enhancing customer engagement, customer service metrics improve.

What Drives Customer Engagement?

FSM software offers a platform to bring the company and the customer closer together and engage both parties in delivering exceptional experiences. Customers want to be well informed on the specifics of their service requests. Providing visibility of service requests, access to appointment calendars, technician details, and their real-time ETA removes barriers between the customer and the organisation.

Remote Service or Self-Service Capabilities

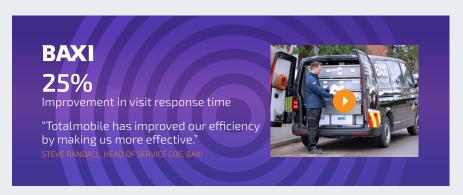
For a company to be customer driven, it must know the needs of the customer: what services are required, when are they required and where will it be delivered?

A self-service portal is a dynamic tool for communicating exactly this. For a customer, features usually include the ability to schedule and reschedule appointments, communicate with technicians, receive ETAs and updates, track an operative's location on a map, and offer feedback on the day of service.

When these features are easily accessed in one place, it optimises the customer experience and demonstrates that you understand the consumer's desire to control the service experience. This not only engages the customer but also empowers them. Call volume, hold times, and no-access appointments are reduced across your service operation — freeing more technician time to deliver customer service.

The key takeaway:

Today's digitally savvy customers want tailored and mistake-free encounters, and demand fast resolution when errors occur. Digital innovation is paving the way for field services companies to meet this. The economics of an engaged customer base speak for themselves. Attracting a new customer is 5-7x more expensive than retaining an existing one. For a field service provider, losing 5% fewer customers can increase profits by as much as 75%









What are the components and features of FSM?

From a small business owner considering going digital for the first time to a mid-sized organisation with some web-based or digital tools experience looking to optimise operations across the entire organisation. At the highest end, FSM software works for large enterprises requiring reliable technology to give advanced analytics and insights for operational fine-tuning at scale.

Regardless of size or where you are on your digital journey, a field service management platform should deliver transformational value in:



FIELD SERVICE PERFORMANCE



WORKFORCE CAPACITY



MOBILE WORKER EMPOWERMENT



MANAGEMENT CONTROL & VISIBILITY



ENTERPRISE MOBILITY



COMMUNICATION



CUSTOMER EXPERIENCE



ESG COMPLIANCE



OPERATIONAL COST BASE

Features of a Field Service Management Solution

You truly get ahead by using a field service management platform to plan the next evolution of your service model. A field service management platform offers a complete approach to service operations, enabling you to transform service delivery from cradle to grave. Stakeholders responsible for the service lifecycle align to the customer's needs and the service demand level. They benefit from greater visibility and control over rich data, promoting a better understanding of performance and driving continuous improvement.



HOW FIELD SERVICE MANAGEMENT WORKS WITH TOTALMOBILE



Totalmobile provide a complete field service management platform that offers a comprehensive range of highly useable and integrated service capabilities.

The Components of a Field Service Platform

The complete range of capabilities provided by the Totalmobile platform touches all stages of the field service process. Our platform integrates directly into all existing back-office systems, enabling organisations to effectively utilise the vital service information that they already have stored in-house.

Here are the capabilities fostering service excellence:

Better Manage Demand



Work Order Management

Organisations can better manage the demand placed on their services with a complete work order management solution. This puts them in control of all required work when it is needed and what exactly is necessary to complete the job. Complete work order management streamlines the entire process with end-to-end tracking throughout the job lifecycle. Solutions like this enable you to create, complete, and track your work orders through one cloud-based interface, from the initial work order to the final sign-off. This approach ensures that every step in the service delivery chain aligns with service demand, even during seasonal spikes or disruptions.



Better Manage Your People



Workforce Rostering

The key to maximising productivity and efficiency is aligning your shift patterns, rotas and rosters around demand, employee availability and volume of work orders. Organisations can better manage their people by deploying a service that allows them to design shift patterns suited for their particular services efficiently. Our rostering solution, Organise, empowers organisations to take a modern and mixed approach to the structure of their workforce. The intelligent rostering capability ensures that the right people, with the appropriate skills, are assigned to the right tasks and shifts. This delivers high-quality services and service continuity.

Better Manage the Planning of Work



Dynamic Scheduling

Organisations can better manage the planning of work by bringing people and demand together. Solutions, like Optimise, consider technician availability, skill level, geographical location and resource access when assigning or reassigning jobs. Dynamic scheduling elevates this, using an algorithm to suggest which technicians are right for the job and in the right place to make assigning workloads effortless.

Once scheduled, the solution notifies the technician of a new work order, delivering the most pertinent task info directly to their device.

Efficient route planning prioritises your field technicians' time on task and creates routes with minimal fuel burn and travel distance. Leveraging realtime GPS, only the technicians (with the correct skill level) closest to a job will be considered during scheduling.

Better Understand Service



Field Service Intelligence

Encompassing all the above, field service intelligence solutions offer real-time intelligence and understanding of everything occurring across the field service process.

Your business is constantly creating valuable data. Harnessing that data is the launchpad for an enormous operational advantage. Field service intelligence enables organisations to fully understand past, present and future

service performance, with a specific focus on highlighting real-time information that details the current status of service. Field service intelligence solutions, like Insight, convert service data streamed from across the service chain into easily understood dashboards for internal stakeholders.

These trends can positively or negatively affect performance. The crucial point is they are in real-time. With this information, operations managers can make higher-quality, more informed, data-driven decisions that optimise processes at the point of service. **This is transformational.**

Better Manage the Delivery of Work



Mobile Working

Organisations can empower field workers with everything they need or require at the point of service delivery with a mobile working solution. Cloud-based field service management solutions, like Mobilise, provide mobile workers with an app that allows access to all critical information in the field. This enables field technicians to access and record data at the point of service. Additional mobile working features provide access to instructional resources when on-task. Your frontline workforce can use these resources to diagnose and resolve errors more efficiently, especially with complex equipment.



Lone Worker Protection

Your organisation can assure its mobile workforce's health and well-being with a lone worker protection capability. Cloud-based employee safety solutions protect your staff in the field. They empower you to create an efficient, high-performing service, prioritising staff welfare and compliance at every step. Hardware devices, SOS fobs or mobile apps can drive greater worker safety across your service operation.

Services like Protect offer a staffed 24/7 Alarm Receiving Centre (ARC), delivering complete confidence that any issues are dealt with by trained individuals committed to ensuring the safety and well-being of any lone worker in need.



WHAT IS FSM TF

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Integrating Solutions

Deploying a new field service solution or platform is two-fold: first, it must integrate with back-office systems. Second, it must crossintegrate with others already in place or as part of the same platform.

The Totalmobile platform integrates directly into all existing back-office systems. This enables organisations to effectively utilise the vital service information they already have stored in-house and achieve field service excellence. Field service excellence is achieved by effectively managing each stage of the field delivery process above. This places organisations on a trajectory where they can achieve significant value against the strategic objectives highlighted in chapter one.

The Totalmobile Platform is also built on core technical principles to ensure cross-platform compatibility and a consistent experience.

Ultimately, your operations management is empowered to transform each stage of the service delivery process, enabling the service to evolve, scale, and continue along your innovation journey.

Integration

this ensures that the information can freely flow between the different capabilities, flowing freely through the various stages of the field service process.

User Experience

The Totalmobile Platform delivers a consumergrade experience with intuitive and easy-to-use functionality. This facilitates rapid user adoption and greater engagement among your workforce.

SaaS Based

The Totalmobile Platform is entirely SaaS-based, enabling your organisation to harness the power of the cloud through low cost of ownership, regular updates and increased stability.

Scalable

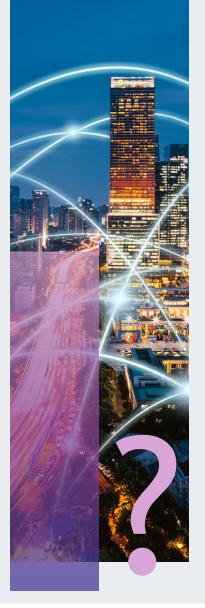
The technology we offer is scalable, deploying just as easily for field workforces of 50,000 people as for workforces of 50 people.

Innovative

A continuous approach to innovation is baked into the Totalmobile Platform. Developing and integrating innovative solutions is ongoing, introducing new features and functionalities to keep your service delivery process on the forefront.







Benefits of Field Service Management

4

FSM software does more than improve your field-based work.

It touches and enhances every step of your field service operation. Everyone and everything can be levelled up.

While the standalone features of field service management can be compelling individually, they are most potent when combined. When you consider the headaches your business endures now, FSM software helps you overcome the problems costing you customer satisfaction and profit - and empowers your entire team to deliver exceptional field service.

Here are the wins you can expect:



PERFORMANCE



ENGAGED WORKFORCE



ENGAGED CUSTOMERS

Win: Performance

FSM software unlocks productivity gains and generates cost savings while delivering the highest standard of service. With a more efficient field workforce, your service delivery is completed more effectively, consistently and on a first-time basis, increasing service quality and user satisfaction.



EMPOWERMENT



CONTROL



REDUCED COSTS



INCREASED CAPACITY



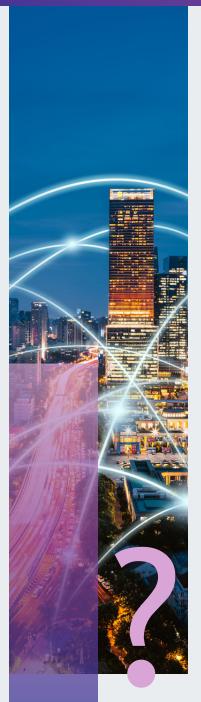
ASSURE COMPLIANCE



COMMUNITY FRIENDLY



A workforce which is better supported, better communicated with and has their needs better met is an engaged one. With better planning, your people can spend more time on the job they've actually been employed to do. This removes many frustrations and time inefficiencies associated with admin. This heightened engagement and greater utilisation of time and skill enhances morale and improves retention. This, in turn, signifies to the broader talent pool that you are an employer of choice, helping alleviate some recruitment pressures.



Win: Control

Your teams can harness real-time data, assuring compliance and responding to changing environments without delay. Service managers can spot trends gathered from field service data, enabling them to react quickly and prevent problems from manifesting. If there is going to be a compliance breach, your teams gain visibility and control over the situation before it escalates.

Win: Increased capacity

With access to work orders, schedules & information in real-time, field engineers can complete more jobs daily, ultimately increasing their capacity. Field staff can access job details and historical notes without delay, resulting in the job being completed the first time, reducing the need for repeat or second visits and creating additional capacity in their day.

Win: Empowerment

FSM software enables your employees to deliver positive outcomes consistently. Staff have everything they need to do their job effectively, where possible, removing frustrations and inefficiencies. Staff are empowered to capture information at the point of service, capture photos and signatures, and retrieve customer and job information from their mobile device. Reducing admin and travel time empowers them to deliver a more streamlined service.

Win: Reduced Costs

With access to resources on the go, your teams no longer must return to the office daily, reducing travel costs and completing paper-based processes. Mobile workers can complete more daily jobs with a manageable and efficient workload. This increases the capacity existing workforce, reducing dependency on temporary agency staff to meet demand. By consistently meeting KPI and SLA requirements, organisations avoid the risk of any associated fines.

Win: Engaged Customers

Empowering customers to take control of their service experience is a win-win: customer satisfaction is increased while streamlining operations for technicians and the back office. This saves you time and money and gives your customers time back. Barriers between the customer and the company are removed. This results in shorter waiting times and a better perception of service quality. It also sets the stage for deeper customer understanding, allowing new customer-centric services to be designed around their evolving needs.

Win: Assure compliance.

Field workers can capture information directly from their mobile devices, such as signatures and images, providing evidence of work completed and providing the service user with a visual history. All information is securely stored and synced to back-office systems ensuring that records are up-to-date and compliant at all stages— avoiding compliance-based escalations.

Win: Community Friendly

By reducing paper-based processes and accessing information via an easy-to-use, real-time solution, paper usage and fuel consumption decline as unnecessary processes and journeys are removed. This improves your overall working processes and the environmental impact of your service offering-reducing carbon emissions and supporting the achievement of ESG strategies.



WHAT IS FSM

TRENDS

FEATURES

BENEFITS



What does successful field service management look like in practice?





GOVERNMENT

£1,000,000 saved

through reducing operational costs

33% increase

in time staff spend delivering service

£600 reduction

in fuel costs per mobile worker per year



HEALTH & SOCIAL CARE

31% more

face-to-face time with patients

100%

of patient visits outcome successfully

61% less

clinical record input time



UTILITIES AND INFRASTRUCTURE

FACILITIES MANAGEMENT

29% increase

in time delivering service

100% compliance

with health and safety standards

24% more

jobs completed per day



TRANSPORT & LOGISTICS

52% reduction

in SLA breaches

33% increase

in staff productivity

15%

scheduling efficiency saving

23% reduction

in the cost-of-service delivery

100% compliance

with all KPIs

35% increase

in delivering required services



HOUSING AND PROPERTY

28% increase

in repairs and maintenance productivity

21% increase

in turnover

35% more

jobs are being completed every day





IN PRACTICE

Contact Us

Totalmobile is a Field Service Management (FSM) provider passionate about making work and the lives of mobile workers better.

See How The Totalmobile Platform Helps Your Organisation Increase Productivity, Reduce Cost & Deliver Exceptional Service

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