

# Automating **Field Service**

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Field service management is one of the most important processes by which businesses provide technical support to their customers and users.

As the name suggests, field service management is performed in the field, not on company property. Field service technicians aren't sat in their offices providing tech support remotely; they go to their clients and assist them without the benefit of any resources they keep on their own networks.



Field service agents work 'on-the-go'

Field service agents rely on having the right information and tools to provide comprehensive support. Yet many businesses are still relying on outdated methods to manage their field services (more often than not, Microsoft Excel). The results of using these methods are typically an inefficient service, missing information and unhappy customers as a result.

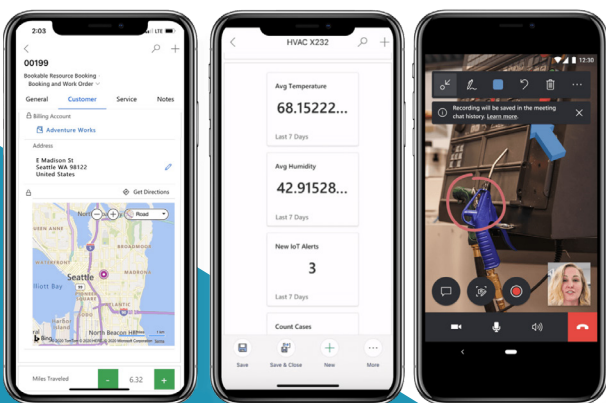
Automated field service solutions have come a long way in recent years to correct this; there's no longer any justification for businesses to put off making the switch. In this document we cover some of the benefits that an automated field service solution can provide.

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# Harness predictive maintenance

It's not just the scheduling of field services that's evolved in recent years. It's the delivery too.

The 'Internet of Things' (IoT) - having all the devices around us interconnected and sharing data - is growing in prevalence and opens up whole new worlds of possibilities for businesses that rely on data analytics.



With Industrial IoT (IIoT) predicted to add \$14.2 trillion to the global economy by 2030. Any business eager to secure a slice of that needs to plan ahead. Automating field service solutions enables businesses to harness the power of predictive maintenance, anticipating customers' needs before they arise and put measures in place to pre-empt them.

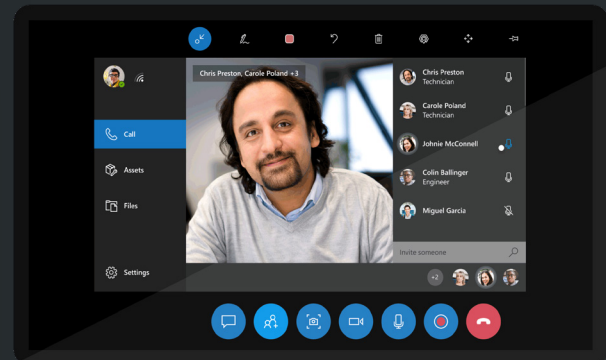
In our increasingly data-driven world, customers are starting to expect the products and services they use to make predictions about their future behaviour. For example, we have all grown so used to seeing adverts based on what online services think we will do or want in the future that we no longer think anything of it.

Predictive maintenance allows businesses to be pro-active instead of reactive. This benefits customers by increasing the lifespan of assets and reducing business downtime, and benefits service providers by reducing the required number of field visits they have to make.

# Increased agility with mobile

You can't put a price on agility.

According to a recent survey, 80% of field management businesses see mobile field service applications as essential for increasing efficiency. Almost half (44%) believe that these solutions are necessary for overcoming industry pressures. A slightly smaller percentage (41%) think that mobile field service apps will enable them to increase the number of service requests they handle.



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Time is a valuable resource. Businesses should always consider the time costs of their operations as well as the financial costs. Field technicians equipped with mobile automation tools can work faster and more efficiently - accomplishing more and ultimately keeping the customer happier.

For many field service technicians, paperwork and other administrative tasks account for a significant portion of their days, as does looking for information. Automated field service solutions can eliminate the need for technicians to manually complete paperwork and ensure that the information they need is at their fingertips when they need it - whether that's technical information about a customer's setup or a how-to guide on how to get the task done.

The right field service solution can deliver this information to be accessed easily on the go, giving technicians exactly what they need and nothing else.

# Improve customer satisfaction and retention

Delayed responses, repairs that don't deliver, and a lack of urgency around emergency callouts can all damage your reputation among your customers. All of these issues can arise from poor scheduling and inefficient management in the field.

Automated field service solutions help to avoid complications like these. Automating maintenance scheduling and enabling customers to book their own appointments and service requests ensures you are always on top of your field service obligations. Your customers receive the support they need whenever they need it. And it empowers them to make choices about when support works for them.

Not only will automated solutions make it easier to ensure you are keeping up with your customers' field service needs, but they also provide you with a simple and reliable portal for facilitating communications between you.

If there are any changes or delays to a job, you can send (or even automate) an email or text message update with a progress status.

Providing customers with a means of immediately logging their issues and tracking their progress as they work their way through your systems means they are always in the loop and can have complete confidence that you are giving their issue the attention it deserves. Similarly, technicians can monitor the state of each of their jobs and, for issues that require more than one set of eyes, track their colleagues' contributions as well as their own.

Keeping your customers informed and providing them with a simple way of reaching you when they need to shows that you care about their experience. Seeing that you care makes customer retention that much easier.

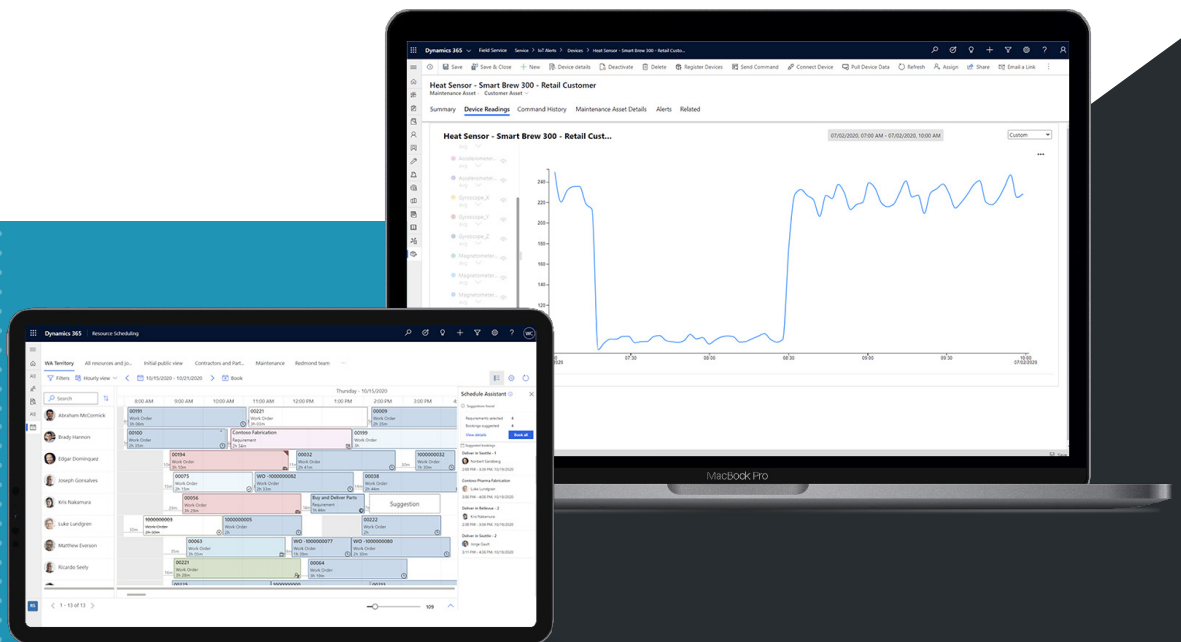
And configured correctly, this can all be achieved with no effort or action on your part whatsoever.



# Ensure the transfer of legacy knowledge

One of the biggest problems facing any business that offers field service management is how to deal with the departure of an experienced technician. When an experienced and knowledgeable member of staff leaves unexpectedly, businesses run the risk of losing the knowledge and insights they have accumulated over the years. The younger, less experienced technicians will usually look to senior staff for their knowledge.

With automated field service software, you can create knowledge databases that all your staff can easily contribute to. Adding notes, guides, and other information to your shared network ensures it's accessible to future generations of workers. Whether these notes pertain to specific customers or more general advice about maintaining the systems and components you provide to customers, digitising and preserving this information is invaluable.



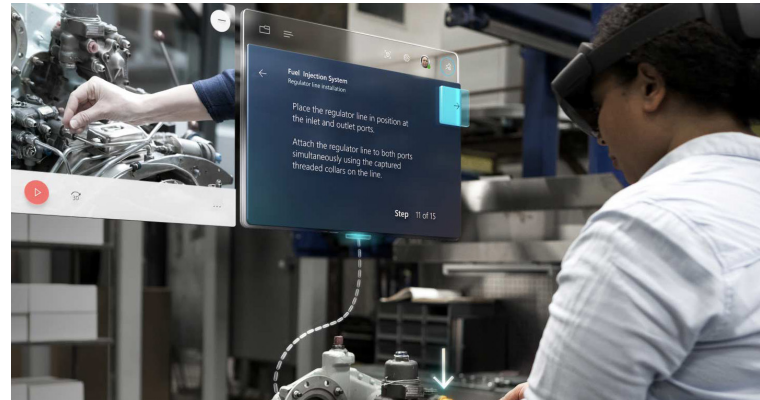
# Adopting Dynamics 365 Field Service

Trying to embrace just some of the benefits that automated field service solutions offer may present a huge culture shift for some businesses. But moving to smarter working can be approached in phases.

What is important, though, is to have the right technology in place to support all of these benefits.

Microsoft Dynamics 365 Field Service is a tailored customer relationship management application designed specifically for the management of field technicians and services.

Utilising Dynamics 365 Field Service and combining it with other Microsoft solutions (including Teams, Azure IoT and Power App Portals), all of the improvements above are deliverable and can make delivery of field services effortless.



Entire schedules can fill without a single administrative action. And field technicians can access all of the tools and knowledge they need to complete tasks effectively from their mobile devices.

Having the right automated field service solution on their side allows businesses to operate with increased efficiency and maximum profitability.

To discover how your business operations could benefit from Microsoft Dynamics 365 Field Service, **please contact us for a tailored demonstration.**





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