

2019

Buyer's Guide for Field Service Management Solutions



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Getting started

Choosing a field service management solution for your business can be complex.

- What should you look for?
- Which solution best suits your company?
- Which features are important, and which can you do without?
- What do you need to look for in a vendor?

Our Verizon Connect Buyer's Guide for Field Service Management can help you navigate the decision-making process.

It includes a summary of the key considerations when selecting a solution and a vendor, a step-by-step outline of the buying process, and what to expect after you've made your purchase.

Read on to learn more about the possibilities for field service management.



Is field management software right for you?

Regardless of the size of your business, managing a field service operation can be challenging, but the right software can make it easier.

Your business has several challenges. You need to know where staff members are and what they're doing on a day-to-day basis. You need to prepare work orders, schedule and dispatch jobs, and review new and incoming information from the field. Plus, you have to ensure quality standards are met and manage your overall finances.

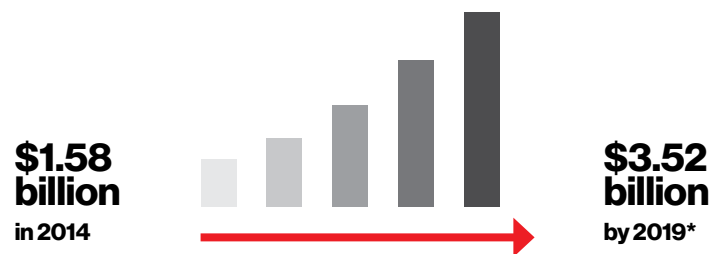
If you're currently doing all of this manually – or using outdated or incompatible systems –

you could be incurring considerable costs, exposing your business to costly errors, and wasting time. That time could be spent focusing on the value-add parts of running a business.

While some Customer Relationship Management (CRM) and Enterprise Resource Planning (ERP) solutions do offer services in some of these areas, they may not cater to your full range of requirements.

Did you know?

The global field service management market has been forecasted to reach over \$3B by 2019.



How field service management software can help you

Today, more and more businesses are investing in software to gain more powerful insights and better control over their day-to-day business. A software solution can help you:

- Work faster and smarter by automating key processes and putting valuable information at your fingertips, whenever you need it.
- Improve efficiency in the field by giving individual workers access to the details they need and reducing ad-hoc communication with field workers.
- Get more organized through automatic scheduling, tracking, billing and reconciliation.
- Work remotely by giving your people access to the information and tools they need from their mobile device.
- Improve back-end processes by consolidating information and making it easier to track overall status and make quick decisions.
- Strengthen customer relationships by automating and streamlining your communication.

Choosing a solution

There are some key factors that you should consider when choosing a solution which have the potential to make a big impact long-term.

Price

Vendors offer various pricing models, so it's important to ask the following questions, try to uncover any hidden costs and eliminate surprises. When determining your budget, it's helpful to have a range in mind, rather than a firm number.

Questions to ask:

- Is the price determined per field worker or mobile asset, or is it all-inclusive?
- Is it a fixed price?
- Are there any training, setup and/or ongoing support fees?
- Are there extra charges for system customizations and forms?

Reporting

Typically, one of the key benefits and features of field management software is its automated reporting. It's vital that the solution you select has a reporting setup that specifically matches your needs.

The solution you choose needs to provide the key information you need to make better business decisions – in an easy-to-use format.

Questions to ask:

- Are the reports flexible, including weekly, monthly or on-demand options?
- Are the reports easy to use and understand? Do they display everything that I need – from job summaries and time sheets, to client histories and inventory?
- Can I access historical and current information?

85%

of surveyed businesses said they were already using mobile field service apps or were planning on using one within the next 24 months.¹



User interface

The amount of data that you collect can be daunting. As such, it needs to be correctly filtered and organized, and presented in a way that makes it valuable and actionable.

As the next generation of field service workers are young, tech-savvy and collaborative, they have high expectations for the performance of the solution and the design of the interface. Meanwhile, your solution also needs to cater to field workers with less technical skills.

Questions to ask:

- Is the interface easy to use and understand?
- Can it be customized to my business?
- Does it have a dashboard view that enables all of the key information to be accessed from a single location?
- Is it suitable for a broad range of users?

Customization

One of the most important questions to ask regarding any field service management solution is its level of customization. Some providers may offer limited features, but customize the solution entirely to the business. Others may offer far more features – but limited customization. Regardless of which solution impresses you the most, make sure it meets your needs.

Questions to ask:

- To what extent is the solution customizable?
- How does the customization process work? What is involved?
- What are the costs associated with customization and how are they configured and calculated?



Mobility

Mobility is becoming more essential to doing business. Workers expect to be able to connect to the office anywhere, at any time. They expect to be able to get the information they need from their mobile device as soon as they need it. Plus, mobility delivers crucial benefits for flexibility and efficiency.

Questions to ask:

- Can my workers access the information they need to get the job done, wherever they are?
- Can remote field workers access job details?
- Are workers able to capture signatures and invoice clients on the spot?
- Can I alert field workers of changes to their schedule and attach images, if necessary?

Choosing a vendor

Your choice of a vendor makes a considerable difference and can have a significant impact on ongoing success. A few things to look out for:

Support for larger businesses

Often, companies fall into the trap of choosing a vendor that can't fulfill its support requirements for larger businesses (50+ employees). If you have a larger business, check to see if your provider has experience working with businesses of similar sizes.

Questions to ask:

- How many field workers can your solution support?
- Do you offer additional resources for handling implementation and training?
- Do you offer dedicated, around-the-clock support, or is this provided on a per-need basis?
- What professional services do you supply to get the solution up and running?

Longevity and stability

When implementing software, it's worth choosing a company with a solid reputation. This company will be intimately involved in your daily business functions so you want confidence in their ability and longevity. The longer they've been in business, the more people they employ and the bigger their customer base, the greater the likelihood they'll be around for a while.

Questions to ask:

- How long has the company been in business?
- How many customers does the company serve?
- How many employees does the company have on staff?
- How can the company demonstrate financial stability?

Important tips:

- Look for providers who offer quality implementation and support. This will matter after the sale has happened.
- Choose a provider you think will be easy to work with. It's important to know your questions will be answered, software implemented and support provided without any hassle.
- Be cautious of companies who claim you can implement their software independently.
- When comparing pricing, consider the cost of implementation versus the cost of your time – and the level of frustration involved with doing it yourself.

Training and support

Training and support may seem incidental compared to the actual capabilities of the software, but once you have a solution in place, these factors play a major role in your day-to-day experience. Quality providers make dedicated support staff available, at your convenience, to handle any concerns that may arise.

Questions to ask:

- How in-depth is the training? How many sessions are provided? Is it live or through recorded tutorials?
- Is the training conducted by professional trainers or sales people?
- Do I pay additional costs for anything beyond initial training?
- Do you outsource support or provide it directly? Where is the customer service department located? Are they local?

Implementation process

A smooth implementation process is critical, so your business can quickly realize the value from its investment. On the other hand, a bad implementation can lead to confusion and delayed adoption. Different providers have different approaches when it comes to implementation. Make sure you are clear about a potential provider's approach and the specific costs.

Questions to ask:

- Do you have a dedicated implementation team?
- How long is the implementation process?
- Do you offer self-learning resources (webinars, videos, etc.)?



Did you know?

56% of field service management businesses said that investing in mobile technology is critical for improving their performance.*

Key features to look for

It may seem like an obvious consideration, but it's very important that the solution you invest in is simple and easy to use. Here are a few items to consider:

Dashboard

You need to evaluate a solution's dashboard just as you would any other critical capability. Pay close attention to what's shown and the value it delivers. This is where you'll measure how well your team is performing on metrics like jobs per month and jobs by field worker.

If a dashboard isn't easy to use and understand, it can make it difficult to get real results from the system.

Questions to ask:

- Is there flexibility when it comes to viewing data for different time frames?
- Can I create and save my own custom reports?
- Can I export and download reports for others to view?

Remote access

Mobility is now core functionality that you should expect from your provider. Be sure to find a platform that will give you and your busy on-the-go field teams a full-featured mobile app that doesn't compromise on user experience.

Questions to ask:

- What can and can't I do with the app?
- How does the app enhance communication with the home office?
- Are there dedicated apps for both iOS and Android devices?
- How often are updates released?



Administration and setup

Getting new software up and running can be difficult, but it doesn't need to be. Be sure you ask your potential vendor to show you the details on how setting up your account works, as well as which settings you are able to change.

Questions to ask:

- Is it possible to control which users can access features with permissions?
- Does this require help from IT to set up?
- How can I customize my settings and how difficult is it to do so?

The buying process: A step-by-step approach

As with any technology purchase, the key to making a successful decision is to stay focused with a step-by-step approach. It's important to consider every last detail of a potential solution – as it will have a big impact on your business over time.

Consider these steps prior to your purchase:

Step 1:

Engage all stakeholders

Before you select any solution, it's crucial that you bring all your business' stakeholders together, and confirm everyone agrees on the budget, objectives and approach. By getting your business leaders in the same room at the start of the selection process, you're less likely to experience conflict down the road. Plus, your IT teams may be able to provide valuable insights that can narrow your search right away.

Questions to ask:

- How can we ensure a cohesive approach to the project across the business?
- Will we have a committee of decision makers from across the business?
- How will decisions be communicated?
- Where is the budget coming from and will this remain the same over time?
- How will current departments be affected?

Step 2:

Determine your goals

Once you have sought buy-in from stakeholders, it's crucial to think carefully about your needs and document them in detail. It may be useful to engage a third party to help you evaluate your needs, and to match a solution to your requirements.

Questions to ask:

- What frustrates you the most about the systems you use now?
- What key things do you want to overcome?
- What do your employees need from the new system?
- How can you help them work faster and more effectively?
- What are the biggest opportunities for your business by making this investment?
- What common goals do you have across the business and what goals are there in individual areas?



Step 3:

Set benchmarks

To be able to measure the impact of your investment, it's important to take the time to measure your performance before it's up and running.

Questions to ask:

- How much more efficient do you expect your business to be, and how will you measure this? In what areas?
- How much money do you hope to save? How? And how quickly do you want to achieve a return on investment?
- What efficiencies do you hope to gain in terms of resources?

Step 4:

List your out-of-the-box needs

A certain level of customization is required from any field service management solution. To ensure the solution you are selecting is right for you, it's important to think about and document any unusual or specific features that your business will require.

Questions to ask:

- Which people in your team will need access to the solution in the first year and what will they need in order to achieve your goals?
- For reports, exactly what information do you need to see and when?
- What do you need now, and what will you need in the future?

What to expect after purchase

Once you've made a decision, it's time to engage a provider and start the customization and implementation process. Here's a quick summary of the key stages.



Signing the contract

This can be a time consuming process, but is one that's important to get right. Make sure that the agreement is keeping with your overall budget and payment plan, and that you know what to expect when it comes to potential costs. If possible, ask for a roadmap of future expenses.



Training

As soon as implementation is done, there should be a training session (or multiple, if required). To have the best possible adoption across the business, require that all potential users make the session, and prepare some questions ahead of time, so that everyone leaves the session ready to log in and go to work.



Consultation

If your solution requires customization, there should be some kind of consultative process whereby the vendor aims to understand your specific needs regarding the solution. They should then give you a plan for how they can implement the solution.



Communication

For the ongoing success of your solution, and maximum uptake, it's important that you keep your team fully informed about what's happening and how the new system can benefit them. Communicate regularly and consider providing a forum where their questions can be answered.



Implementation

Once your solution is configured, it can then be implemented. This can be a complex process, so it's important to have a partner who can guide you step by step.

Important tips:

The key to introducing field service management software to your team is to be open, honest and positive.

This is your moment to dispel fears about Big Brother by presenting the solution as a way to streamline dispatching, increase productivity and minimize distractions to your team in the field.

What now?

While field service management software can make significant positive impact on your business, it's important to choose the right provider—right from the start.

Get your key stakeholders involved early, know your goals and choose the solution you can customize to your business. Most importantly, choose a partner you can work with and who can offer the support and training you need, long-term.



To learn more, visit verizonconnect.com or call 866.844.2235