

6 field service practices that are holding back your growth

Come on, be honest. Are spreadsheets the bane of your life?

Even if “bane” is too strong a word, it’s unlikely that manually entering data into a spreadsheet is your idea of a good time. (If it is, we’re not judging, you carry on, and we apologise for any offence caused by the anti-spreadsheet portions of this article.)

The thing is, if you’re relying heavily on spreadsheets, it could be a sign that your field service management system is a touch past its use-by date. We say a touch. It could be that it’s so far past its use-by date that it’s starting to stink out your cupboards. In which case—time to throw it out.

After all, we’re reaching the end of the second decade of the 21st century (yes, sorry, we feel depressively old now too). In a service-driven world, field service is the elite, but only if the organisations that do it, act like it. You can’t be a king without a castle. And you can’t grow your field service business and cement your position in your vertical without decent field service management (FSM) software at your disposal.

So, here are 6 field service practices that it’s time to let die peacefully.

1. Using spreadsheets for key business processes

Using hand-edited spreadsheets for managing contracts, assets and service tasks is almost as bad as using whiteboards and paper diaries. (If you’re among the few still using those, please call us immediately for your own health and safety.) It means that none of your data is live and everything has to be manually updated, usually in several different spreadsheets. Spreadsheets offer no visibility, and visibility of your processes and your performance is crucial if you want to grow.

Good FSM software eliminates the use of spreadsheets for key business processes such as contract, asset and job management. It will automate and integrate these processes so that your organisation has full visibility of everything that's going on. It also means your service and back-office teams avoid repetitive strain injury from all that data entry.

2. Paper in the field

The field's no place for paperwork. It's bad for your engineers. It means they have to handwrite everything they do and deliver lots of bits of paper to the office by hand or by post. It also means that the only information they have about a customer, contract, machine or job is what they're given by phone or email by job planners and dispatchers in the office. And requesting parts has to be done by paper, phone or email, too.

It's also bad for your office teams. It means they have to wait for worksheets to come in from engineers before they can enter any data. And they probably have to enter that data in several different places. Oh, and sometimes worksheets are illegible, covered in food and coffee stains or just go missing altogether. It's a recipe for delay, error and confusion. One big pain in the neck.

A good FSM system will come with a mobility solution that eliminates all paperwork from a field engineer's workflow. Through an app on their phones or iPads they'll get notifications of new jobs and all the information they need to complete them. They'll also be able to do a whole bunch of things they used to use paper for: file service reports, request parts, obtain customer signatures, etc.

The benefits? Your engineers complete more jobs per day, administration costs plummet, bills get paid quicker, and everybody gets to go to Barbados.

(Alright, we added the Barbados part. But the point is—save money, make more money faster, have lots more to play with.)

3. Using non-FSM software for FSM

Many organisations are still using software that, frankly, doesn't work for what they're doing. To do FSM, you really do need an FSM solution. Some companies use customer relationship management (CRM) or finance applications with FSM bolt-ons that aren't very sophisticated. Other companies have implemented large and costly enterprise resource planning (ERP) systems that aren't configured to handle the complexity of an FSM operation. Worse, they often impose rigid business processes that seriously limit an organisation's long-term flexibility. And you can't grow without flexibility.

So, a dedicated FSM solution is what you need. Only with a dedicated FSM solution can you take on new customers, expand your machine base, and acquire new companies without the whole system breaking and your service teams' blood pressure hitting uncharted highs.

4. Separate sales and service departments

This might've been okay back in the day when sales and service were different beasts. When sales was about selling machinery and service was about maintaining it. When sales was the profit centre, service the cost centre. But that's all changed. Now it's all about *selling service*. Customers these days are less interested in owning equipment and more interested in buying fully managed services on a subscription basis.

So it's frankly illogical to have your sales and service teams operate in silos. Increasingly, your field engineers are themselves being asked to act as salespeople, upselling and cross-selling your company's products and services. That means they

really ought to know if the customer is already talking to your sales team. Equally, your sales team need to know how much the customer is spending, has spent, and on what. In other words, they need data about the value of the customer's contract, the history and status of their equipment, what their service entitlements are, what parts they've purchased, etc.

An FSM system with sales management functionality will improve your sales processes and customer relationships by unifying your sales and service departments. Complete visibility of all sales and service activities in the same system allows both teams to be fully informed when pursuing a lead.

5. Using multiple unintegrated products across the service chain

Some companies use different products at different stages of the service chain, e.g. one product for contract and job management, another for engineers in the field, and another for invoicing. This works only if all those products are integrated so that data flows seamlessly between them. The reality is that many companies using separate products throughout the service chain are bogged down in time-consuming manual processes trying to get them all to talk to each other.

The ideal solution is a dedicated FSM system that can manage all of the core FSM processes. For instance, the products Asolvi offers have modules for contract management, job planning, scheduling, mobility, sales management, stock control, invoicing and reporting, and data flows seamlessly between all of them.

However, it might be that you want to keep hold of certain products that work really well for your business. In that case you need an interface between that product and the FSM system. Products like Asolvi's have extremely wide scope for integration and that's because we know that integration is the key to a successful system. Our products

already integrate with a huge number of 3rd party products and we're continually building new interfaces to make our customers' lives easier. For example, we're about to roll out integration of our managed print services (MPS) software with Xerox Partner Print Services (XPPS). This will help our office print customers offer a better, more cohesive service to their end-users.

6. Using multiple unintegrated products across the business

You're probably using different products for different business operations, i.e. one product for field service, another for CRM, another for customer support. But how integrated are these products? Are they integrated at all? With no integration between the key departments that make up your business, it's difficult to manage how your business, as a whole, performs.

Asolvi software integrates with numerous CRM and ERP systems to help get the different arms of your business on the same page. And right now we're working on an interface with renowned customer service platform Zendesk, too.

The moral of the story

Integration, integration, integration! Okay, okay, we'll shut up about integration now. We won't mention it again. Damn those buzzwords.

Seriously, though, the key to future growth is making sure you have field service management software that eliminates all inefficiencies and enables you to take on new customers, contracts and companies with ease and speed.

Oh—and did we mention integration?