

A man wearing a white hard hat and a safety vest is smiling while looking at a tablet computer. The image is overlaid with a blue tint.

E-BOOK

8 Field Service Strategies for Success

 skedulo

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The evolution of field service

Field Service organizations are constantly challenged toby the need to manage a complex array of variables, including:

1. A high volume of geographic work locationsLower operating costs
2. A diverse and hybrid workforce
3. Growing pressure to provider improved visibility, predictability, and service quality to clients

It's estimated that there are **20 million** field technicians worldwide who operate on the frontline to install, repair and maintain some of our most vital equipment and systems.

While the nature of field service differs from mobile work (people who provide a customer-facing service not at a desk), both fall under the main category of deskless workers.

As a deskless productivity platform engineered to support all field service and mobile workers, our team at Skedulo has worked extensively with organizations just like yours.

Over more than a decade and hundreds of consultations with our valued clients, we've been privileged to gain huge insights into the difficulties and opportunities that you too may be facing.

In this short eBook, we share some of these insights as strategies that you can implement to help you stay ahead of your competitors in this new era of digital connectivity.

Strategies for success in field service management

Strategy will play a crucial role in empowering field service businesses in an ever-changing and always-connected world.

With this in mind, the Skedulo team has collated **8 strategies which we believe will best equip field service leaders for success:**

-  Drive field productivity and efficiency with FSM technology
-  Be strategic when selecting an FSM solution
-  Let AI take your scheduling to the next level
-  Focus on the field service KPIs that matter most
-  Aim for 5-star service with customer-centricity
-  Be an employer of choice
-  Prioritize safety and security
-  Take practical steps towards sustainability

Each of these areas is already proving to set certain field service organizations apart from their competitors – driven primarily by changing customer expectations and advancing technology that allows us to streamline the many manual, time consuming tasks that were taking our attention away from activities that create true business value.

Strategy 1: Drive field productivity and efficiency with FSM technology

While the premise behind great field service – qualified workers delivering a timely and quality service – hasn't changed, the way we manage people to achieve this outcome has transformed exponentially.

Companies that leverage the right FSM technology to re-imagine their operations have experienced enormous benefits. They have been able to:

1. Increase productivity and efficiency – assign and sequence jobs up to 50% more efficiently, increase work capacity by 20%, get actionable insights for leaders
2. Lower operating costs – reduce travel time, manual error and paperwork. As one of our customers put it: “We’ve gone from 100% paper-based to 90% digital!”
3. Increase revenue – complete more jobs in a day
4. Deliver better quality and more consistent service – track client preferences and automatically assign the most qualified staff
5. Scale with ease – manage a high volume of work and mobile workers with automated scheduling and one-to-many work assignment

On the flip side, companies which still rely on legacy methods (siloes on-premises systems, spreadsheets, emails and phone calls) will find it difficult to keep up, even if they employ the best service technicians in the world.

This is because the cost to manage traditional operations in a modern environment is highly unsustainable, and a cost that's quite often passed to customers.

Drive improvements with FSM technology, cont.

Field service companies that don't evolve are also likely to miss key opportunities – such as engaging mature workers and users who may not be particularly familiar with new software.

While you may perceive these people to be your greatest barrier to adoption, simply having a smartphone (as most people do) demonstrates that they are adapting to change and would likely be excited by the chance to further their skills.

In addition, deskless workers have told us that they are choosing to leave companies which have not evolved their systems for the benefit of their employees. This leaves companies at risk of losing key personnel.

Skedulo's recent State of Deskless Work report (Q4 2021) revealed that **97% of organizations** agree increased employee autonomy would improve retention, client satisfaction, performance, and market share. However, improving employee experience and empowering mobile workers ranked lowest among strategic priorities for respondents.

As industries continue to grapple with increasing skills shortages, leveraging technology to close this gap will become imperative.

Less than **one-in-ten** deskless workers have “a high degree” of control over their schedule, while nearly **one-in-three** have low or limited control.

State of Deskless Work report (Q4 2021)



You might like:

[The Evolution of Field Service Management: Beyond Break Fix Use Cases](#)

Strategy 2: Be strategic when selecting an FSM solution

You may expect that transforming your business with the latest technologies requires a huge outlay. However, we've proven this doesn't need to be the case.

Subscription models allow you to pay only for what you need, and scale up or down in line with business growth. In addition, today's competitive vendors deliver world-class client service via a consultative approach from first contact through deployment and beyond. They treat customers as partners - sharing industry-specific best practices and actively helping organizations realize clear ROI via rapid deployment with best-in-class payback periods and go-live time frames.

While it's true that some platforms are costly and offer little opportunity to customize, Skedulo provides the functionality depth of a purpose-built solution with the breadth of a platform for:

1. Easy integration
2. Capability at scale
3. High flexibility in customization

This means you can deploy Skedulo to manage your entire field service division in a way that achieves your specific FSM goals, and have it integrate with other new tech solutions that solve different business needs (such as your CRM or accounting software). Ultimately, this strategic approach creates a seamless operating environment which meets the needs of a modern workforce and the expectations of today's consumers.

Optimizing their FSM processes to deliver a better customer experience was one reason ECL Group (a leading technical services company) chose Skedulo.

"We've enhanced the app to the point where we have forms that integrate with Skedulo. Those forms convert to PDFs and are assigned to the job record, then they are sent through to the customer. The customer has full visibility of their experience with us."

Chief Information Officer, ECL Group

Be strategic when selecting an FSM solution, cont.

Once upon a time an engineer from a town's only energy company could show up to a customer's house any time between 9–3pm, and deliver a substandard service without any repercussions.

These days, government regulation in some jurisdictions dictates how quickly a customer's problem must be fixed. At the same time, the customer stands ready to post a negative review and switch to one of the 5 other new energy providers eager to snap up their business.

With every sector facing rising competition and regulation, the way a service is delivered matters. Similar to any mobile worker, field service workers require a more customer-centric approach, where they are empowered to deliver the best possible outcome to every customer (every time).

So where traditional FSM tools might enable more efficient workflows, deskless productivity tools will ultimately help you achieve much more.

The best software enables:

1. Route optimization for less fuel consumption and drive time
2. AI-powered scheduling and dispatching for quicker service delivery
3. Job requirement and client preference matching with worker attributes
4. Data collection and built-in analytics
5. Centralized communication across the business
6. Customer self scheduling
7. Real time updates including automated client reminders and real time worker location
8. Digital forms for less paperwork
9. Seamless integration with other systems

Strategy 3: Let AI take your scheduling to the next level

Rapidly advancing artificial intelligence (AI) and machine learning are changing the way all industries tackle age-old challenges – and field service management is no different!

FSM solutions powered by AI, such as Skedulo, make it possible to rapidly build the ideal schedule based on what you say you want to achieve.

For example, you can tell Skedulo to optimize schedules to:

1. Reduce cost
2. Minimize travel time
3. Maximize appointment capacity
4. A weighted combination of the above or additional criteria based on your unique needs

Embedded intelligence also gives you access to unprecedented data about your operations – from customer experience to employee performance, resource wastage, unnecessary expenditure, and more.

These insights are well beyond what you could achieve with manual data capture which often results in poor data accuracy, lost records, and incomplete and disparate datasets – not to mention the energy required to capture and track the data in the first place.

The availability of new data is what drives a significant boost in ROI from your technology investments. This is why selecting technology that has AI and ML built in can make all the difference to success.

“I have total visibility of the resources that will be in the field tomorrow, the resources I still have available, which branches are being utilised, and much more. I instantly know if I can take on another job tomorrow or next week, because all the data is right in front of me.”

Director of Field Operations, Bay Area Traffic Solutions

Strategy 4: Focus on the field service KPIs that matter most

Once your business is leveraging your AI-powered FSM solution and the insights it provides, it's important to determine the KPIs that will ultimately help you monitor how your business is performing at all levels.

These KPIs should be specific to the unique responsibilities of your people; from field service technicians to their managers and dispatchers.

Here is a brief overview of the KPIs our customers tell us matter the most...



KPIs for Dispatchers and Schedulers

1. Time to schedule
2. Time to first contact
3. Travel time
4. Ratio of Schedulers to Field Workers



KPIs for Field Service Managers

1. Utilization/wrench time
2. Response time
3. Schedule adherence
4. Variance from standard
5. Rework percentage



KPIs for Field Service Technicians

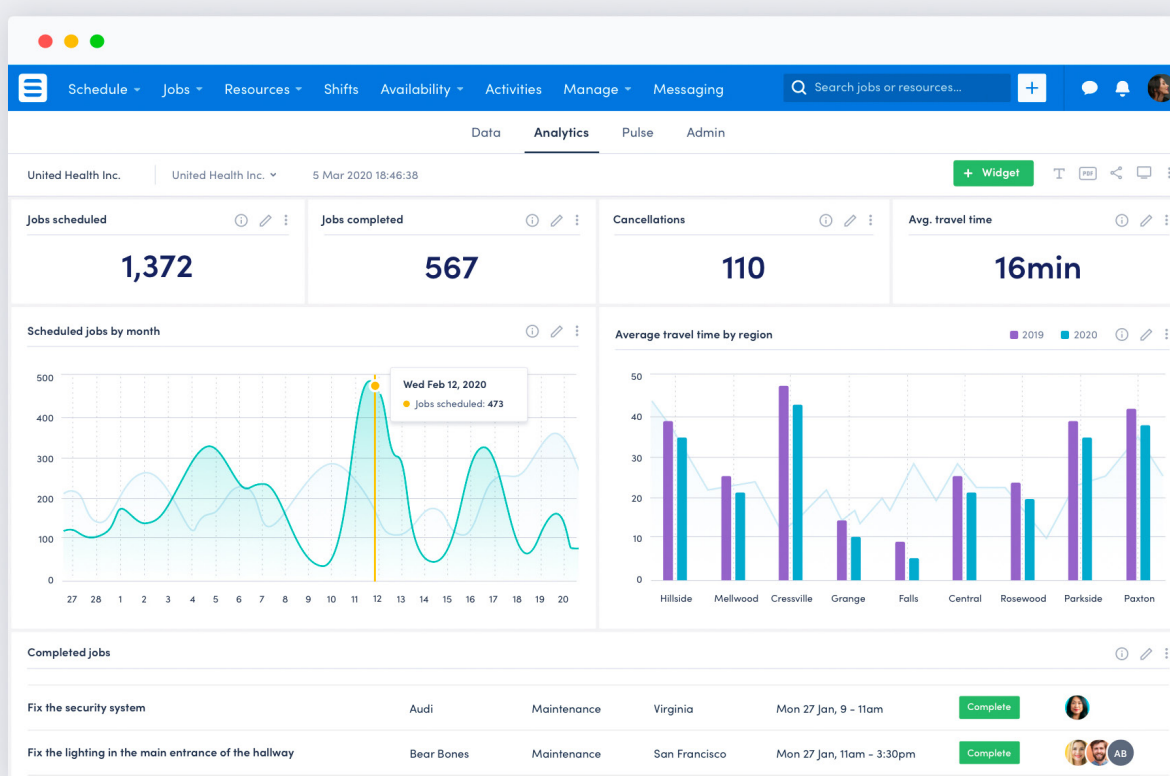
1. Customer satisfaction
2. Jobs completed in a day/week/month
3. Repeat visits

Focus on the field service KPIs that matter most cont.

Let technology do the heavy lifting for you, by serving up these insights via reports that make it easy to make informed decisions and take meaningful action.

“I can now schedule 2 to 3 times as many appointments as before. I had always thought ‘I want this system to do what my brain wants to do!’ And that’s what Skedulo does. I get so excited when I schedule, because I know Skedulo is there for me.”

Care Coordinator, Solace Pediatric Home Healthcare



Strategy 5: Aim for 5-star service with customer-centricity

Customer-centricity matters now more than ever. Up to 97% of people rely on customer reviews to make a purchasing decision, and review sites have become a make or break for new and established businesses worldwide.

For a field service technician, achieving a 5-star level of service means:

1. Rapid scheduling of appropriately certified workers
2. Precise and narrow service windows
3. Allowing customers to track job status in real time, including worker ETA and real-time location
4. Fully equipping workers with the information they need, on demand
5. Arriving with the right tools to get the job done right (the first time)
6. Generating invoices quickly and accurately when the job is done

The ability to provide self scheduling is another capability that's guaranteed to impress. Not only do they save time for the customer, but they free up customer service reps (who can instead focus on fielding more complex calls).

In a world where businesses are plagued by labor shortages and increased overtime costs, self-service may be the one feature your business needs to really stand out among your competition.

“We understand as a company that mobile is the future. Clients don't want to talk to us on the phone. They want to go on an app or a website, pick their service type, schedule their install, see their technician coming, and know they will be there on time. That's the experience we're designing. We want our clients to have control...and make it easy for them to get what they want.”

VP Client Experience, Rocket Fiber

You might like: [The Connection Between Customer-Centric Field Service and Revenue](#)

Strategy 6: Be an employer of choice

According to Gartner, more than **40% of field service work will be performed by contractors** who will likely be working with more than one company at a time. Essentially, many field service providers may be sharing technicians.

This is a scary statistic when combined with a rapidly retiring Baby Boomer generation, and increasing evidence that employees are happy to leave an employer that they don't feel is supporting them to deliver a great service.

Developing a sound staff retention strategy is crucial to success, and must include:

- 1. Empowerment:** Investment in tools that help field workers do their best work.
- 2. Training:** Rapid onboarding and a commitment to up-skilling loyal technicians for the benefit of their career (and your business).
- 3. Flexibility:** **9 in 10 employees** want flexibility in where and when they work. Being able to deliver this will set you apart from competitors.
- 4. Culture:** Workplace cultures that provide great employee experiences are **13 times** more likely to have highly engaged employees.

As noted in our recent State of Deskless Work report, many organizations are experiencing a growing pressure to simplify working life for valuable employees and equip them with the best resources. To unlock the deskless productivity opportunity, innovative firms are investing in their employment brand, reevaluating their value proposition to prospective hires and current employees, and assessing the digital toolbelt they arm deskless workers with.

"It's amazing to think about where we were and where we are now. The mental space it has allowed for me personally and professionally is huge. I used to worry about the next day from the moment I left the office. Now if I'm home making dinner, I'm home making dinner. I'm not mentally living at work all the time which is a big change for me."

Operations Manager, Scrubbi

Strategy 7: Prioritize safety and security

Particularly in a post-pandemic world, the safety and security of your workers is paramount.

In 2020, our own 2020 State of Work Report: Defining a New Normal Amid COVID-19 found that employees were optimistic about the future and how they can be successful in the new normal, with one reason being that technology investments had made their jobs easier.

Here are 4 ways that advancing technology helps ensure the safety and security of your workforce:

Contact tracing

With the right technology, managers can easily track workers' location in real-time, so if an employee does get sick (or is exposed to an illness), they can identify who that worker has been in contact with while on the job and mitigate the chance of further spread.

Data security

With cyberattacks becoming increasingly sophisticated, it's essential to implement platforms with advanced security features built in - such as GDPR compliance, data encryption in flight and at rest, multi-factor authentication, and HIPAA compliance for certain sectors. It is equally critical to make the secure method the easy method for busy employees on the go. Otherwise, organizations risk losing control altogether as employees turn to shadow IT or personal communication methods.



Prioritize safety and security cont.

Check-in and check-out features

Skedulo's mobile app includes a job "check-in" and "check-out" feature, giving employees and their employers peace of mind that someone knows where they are if something were to happen.



Risk management and safety policies

Other ways technology can support internal risk management and safety policies include:

1. Contact-free customer signatures to support social distancing
2. The ability to capture documents, job notes, and photos in the field (and automatically sync them to a central system)
3. Optimized routing to ensure safe driving and on-time arrival
4. The ability to manage lone workers, especially in social care or security
5. Safety checklists to confirm compliance and escalate incidents

You might like:

[What Staff Want in a Field Service Management App](#)

[How Mobile Workforce Tech Can Improve Worker Safety](#)

Strategy 8: Take practical steps towards sustainability

The world is moving fast, and for a business to survive, it needs to move with it.

Sustainability is a key issue impacting business leaders who are under pressure to evolve unsustainable legacy practices and demonstrate social responsibility within their sector.

The right technology can go a long way towards supporting you in this endeavour, by enabling shifts such as:

1. A move to paperless operations
2. Data to uncover inefficiencies and areas of improvement
3. A dramatic reduction in time spent on the road
4. Eliminating first time failures
5. Integration with other new technologies

For example, Skedulo can help you make operations more sustainable by providing a deeper understanding of your business's carbon footprint through data analytics, and removing inefficiencies such as exorbitant driving time or needless paperwork.

Our platform also makes it easy to leverage game changing technologies like IoT sensors for predictive maintenance. Nowadays, your systems can tell you when a part needs to be replaced. Through integration with Skedulo, our systems can automatically book a field service engineer to complete the job so it's all done and dusted before your customer even knows there was an issue.

You might like: [How to Master the Field Service Evolution](#)

Get world class software to manage your field service workers

As a world-leading deskless productivity platform, Skedulo has everything your field service organization needs to drive efficiency, productivity, safety, sustainability, and more.

Key features include:



Drive Field Service Productivity

- Greatly simplify scheduling and workforce management
- Gain visibility into and control over job scheduling and workforce utilization
- Equip employees with an intuitive mobile app to help them better perform daily tasks
- Give operations leaders actionable analytics on their workforce
- Improve client service
- Reduce operating costs through optimized and efficient scheduling and improved workforce utilization



Schedule Smarter: Superior Worker & Job Matching

Every employee is unique. Skedulo empowers your organization to manage diverse workforces and tag employees based on their unique skills, certifications, and attributes so you can match skilled workers to highly complex work.

Many workforce management solutions are not fluid enough to understand when employees are sick, on vacation, poorly qualified, or simply unavailable without manual intervention. Skedulo provides real-time availability to optimize scheduling and reduce time-consuming manual work and rescheduling.



Cut Costs, Improve Impact via Job Offer Functionality

Get control over which workforce segments are able to accept work, so you can:

- Save costs by prioritizing less costly resources, or offer work to the most cost-effective qualified workers
- Prioritize resources based on attributes, including skills and certifications, while maximizing workforce utilization
- Allow employees to select jobs that best align with their schedules

Get world class software to manage your field service workers, cont.



Empower Mobile Workers with a Powerful Mobile App

Support mobile workers with the Skedulo iOS & Android mobile apps, empowering them to:

- Accept work offers, view work and client details, plan and execute work, document details, and communicate with colleagues both in the field and in offices
- Securely capture photos, field notes, surveys, signatures, and more on the go - making workers' lives simpler, increasing retention, and ensuring SLAs are met



Provide a Superior Client Experience

With Skedulo, organizations gain a competitive edge by providing the experience their customers deserve. Improve your customer experience and satisfaction by reducing time-to-service and providing the right employee for the right job via resource tagging capabilities.

- Provide real time status updates, avoid cancellations, and provide customer satisfaction surveys
- Enable customers to self-schedule appointments via a web-based booking grid
- Keep customers in the know with automated reminders, notifications and insights before, during, and after the job



Gain a Clear Return on Investment

- Maximize workforce efficiency with Skedulo MasterMind for optimized and automated scheduling while improving workforce utilization rates and workforce capacity
- Measure how effective and efficient work resources are in real-time via analytics
- Realize ROI via rapid deployment with best-in-class payback periods and go-live timeframes



Integrate with ERP & Work Order Management Systems

- Integrate with existing systems including Enterprise Resource Planning (ERP) and Work Order Management
- Synchronize data and extend systems to reach mobile workers, making it easier for them to execute in the field

Get world class software to manage your field service workers, cont.

Manage Contractors & Contingent Workers

- Given the labor shortages in multiple sectors, organizations are more dependent on contractors and contingent workers than ever before. With Skedulo, you can:
- Manage full-time employees, contractors, and contingent workers in one system
- Provide all workers with a single mobile application to manage their work

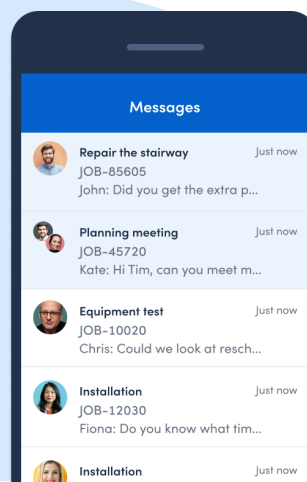
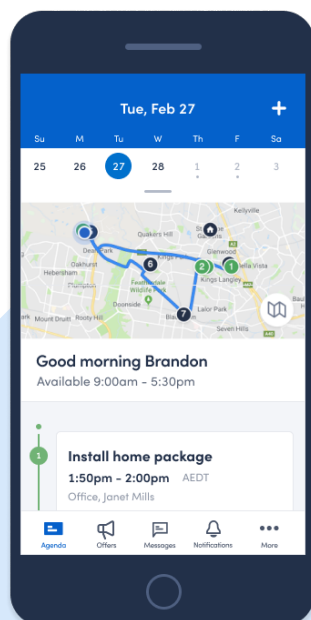
Improve Sustainability Efforts

Skedulo optimizes scheduling and routing, increasing organizational efficiency and minimizing travel time. With measurable reductions in their carbon footprint through metrics such as drive time, organizations can demonstrate their commitment to maximizing their sustainability efforts.

The Last Mile: Provide Clients Real-Time Visibility

With Skedulo, your team is empowered to:

- Alert clients when field resources are on their way to the job site via an automated message
- Provide real-time visibility into resource location
- Customize the content of the alert message and appearance of your Last Mile site with branding options



Key stats about Skedulo

35M+

Appointments
scheduled

Proven
reduction
in employee
turnover

9X

First year
return ratio

7

Additional
weeks of billable
appointments
per year

68%

Improvement
in service
satisfaction

Find out how Skedulo can support your field service business.

[Book a free custom demo](#)



About Skedulo

Founded in 2013, Skedulo is headquartered in San Francisco with offices in Australia, Vietnam and the United Kingdom. Skedulo's leading Deskless Productivity Cloud solution powered by AI and machine learning empowers organizations to manage, engage and analyze their deskless workforce, supporting the 80% of global workers who don't work in a traditional office setting. Skedulo's platform helps enterprises intelligently manage, schedule, dispatch and support deskless workers on the go, whether they are in fixed location facilities or mobile field workers on the frontline.

Skedulo has enabled hundreds of organizations, including The American Red Cross, DHL, and Sunrun, to seamlessly schedule and service over 35 million appointments worldwide. The company has secured over \$115 million in funding to date, led by Softbank, Microsoft's venture firm M12, Costanoa Ventures and Blackbird.

For more information, please visit www.skedulo.com or follow @Skedulo on Facebook and LinkedIn.

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