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FIELDONE
ENTERPRISE FIELD SERVICE

5 mistakes to avoid when evaluating an enterprise FIELD SERVICE MANAGEMENT SOLUTION

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5 Mistakes to avoid when evaluating an enterprise field service management solution

Executive Summary

Many companies offering Field Service Management and automation solutions may impress with a long checklist of features: schedule boards, dispatching & routing, work order management, automatic billing, and more. The benefits will include increased productivity, reduced costs, improved customer experience and obviously, a great ROI in the near or medium term!

However, there is another list of factors (generally not broadcasted) to consider that cannot and should not be overlooked. Use this e-book to learn how to meticulously assess product offerings and **avoid 5 key mistakes** that could turn your star FSM project into a costly, time consuming and frustrating experience.

We take you through David, a VP of Operation's journey to highlight the challenges and problems he faces during implementation and the key factors that he wishes he had considered when evaluating an FSM solution. Hindsight is 20/20…so take advantage of his experience!

The following are key issues to consider sooner than later:

1. Development Costs

2. Implementation Time

3. Third Party Integration

4. Mobile Applications and updates

5. Deployment Decisions

Key Takeaways

Evaluating and implementing a FSM Solution is not a simple process. Below are 5 areas where mistakes are commonly made. Learn how to spot these beforehand, ask the right questions, and know what to look out for.

Development Costs

Professional fees can easily skyrocket during implementation and rollout if all relevant parties, ranging from Operations, Finance, IT, Warehouse and Sales & Marketing to Customer Service are not engaged from the beginning. To avoid high development costs and professional fees as needs arise or are discovered, look for:

- Products built on industry- standard platforms with open architectures.
- Offerings that can leverage available modules, functionalities.
- Off-the shelf apps or plug-ins that can easily provide the needed functionality.
- Vendors with a comprehensive and well structured discovery process to identify your detailed workflows and business requirements.

Implementation Time

Any FSM implementation and rollout will require time, input and resources from a number of functional areas. In addition, vendor resource availability for customization can also generate delays. Avoid potential problems by looking for:

- An application built on a widely deployed and standardized platform.
- Detailed and customized online collaboration platforms.
- Effective online collaboration between internal and external parties.

Third Party Integration

Integration is probably the most expensive, high-risk stage: connecting any new system to a company's existing data and applications is NOT a simple task.
To ease integration and avoid potential delays or exclusive reliance on vendors, look out for:

- Open platforms with built in connectors or third party connectors.
- Clear data preparation and import guidelines.

Mobile Applications and Mobile Management

Although HTML5 might be an easier, less costly option for mobile, it also poses a number of challenges versus native apps in terms of performance, user experience and security. Be sure to consider:

- The advantages of Native Apps with richer features and usability.
- Mobile Apps that can work without wifi.
- A Central Mobile Management Console for updates across platforms.

The Deployment Decision

The deployment decision: cloud, SaaS, private cloud or other has to be evaluated carefully in light of current and future scenarios and resource constraints. Look out for:

- A flexible approach to deployment that can accommodate changing needs at a reasonable price.

Background and Problem

David is the VP of operations at a large heavy equipment servicing company. For some time, his company has been wanting to move away form its legacy systems and embrace a more “modern, versatile, scalable and mobile” Field Service Management Solution that will allow them to overcome a number of their current problems and challenges:

Increasing customer service complaints

Customers have been complaining about delays, techs not meeting time windows, issues with billing, the tech’s inability to get work completed in first visit etc.

Operational inefficiencies

The company is increasingly aware of its manual dispatching inefficiencies, expediting resources, techs, non-optimal routing, mismatched skill sets, no real- time adaptation to unforeseen changes, heavy reliance on paper forms, double data entry, clerical errors, invoice delays.

Increased costs

Higher labor costs and increasing overtime, reduced tech utilization, SLA penalties, revenue leakage, inventory shrinkage, high fuel costs, and idle resources,

Personnel Issues

Lost time, high turnover, constantly in firefighting mode, burn out, low morale.

David is tasked with finding a solution with the following criteria:

- Will address the problems/challenges above.
- Is economical and can produce an evident ROI in the short – medium term
- Is simple to implement and can be deployed quickly.
- Can leverage the company’s existing pool of mobile devices.
- Is compatible with IT requirements.

Let’s recap David’s experience as he starts the process and begins to roll out the new FSM solution at his company.

Evaluation and Proposal

David evaluates several vendors online and ends up with three. He likes their websites, testimonials and value propositions and they all offer similar features and benefits.

After seeing their demos online and going through an initial discovery call, he feels confident that they can all handle his company's requirements.

Since price was one of the key factors, he decides to go with the mid-point price offering. He does not want to risk going with the lowest price, nor risk rejection from management for recommending the higher priced offering.

The Company "FSM Solutions Experts" offers

- Optimized dispatching, scheduling and routing
- Out of the box configuration to accomodate to company's business and workflows
- Quick deployment and rollout (6-8 weeks)
- Easy to use interface for office and field personnel
- No coding or high involvement from IT and easy integration with their existing systems
- A low set up/implementation fee and competitive pricing on licenses.

David, happy with his research, interaction with vendors and evaluation, puts together his recommendation and presents it. Management is happy and eager to not only get the project started, but also roll it out as soon as possible. The CEO also tasks David to produce an ROI report 3 months down the road. The agreement with a 2 year commitment is signed and the process begins…

Let's take a closer look at what happens in some of the key areas and the issues that arise as the project unfolds…

1 **Development** Costs

During the evaluation process, David does not have a chance to engage all relevant parties or key subject matter experts to provide insights into specific requirements each area has or will have…e.g. Technicians, Finance, IT, Warehouse, Sales & Marketing etc. Soon as the project unfolds, unforeseen requirements or "wants" begin to surface and additional professional service costs start to increase dramatically.

Note that the most common product implementation model in the market is the initial purchase of a base product with a preset, proprietary workflow and user experience scenarios, that is then customized and adjusted to meet the client's needs. This is what David signed up for…

> ***"The final bill is often 2-3 times the original budget of the base product."***

What is not that obvious to the customer or David however, is that built into the vendor's financial models are charges for customization by a professional services team; the final bill isoften two to three times the original budget of the base product!

Aside from the obvious frustration these ongoing changes present to the customer, it triggers another predicament: Every change or customization carries a new price tag. The manager responsible for authorizing the expense must be confident that even a general usability improvement justifies the expense. The result is that that usability-motivated adjustments that might decrease frustration, improve general productivity and free up time, may not pass the "immediate ROI" test and thus be left behind.

So what should you look for to avoid these mistakes and the costs and dilemmas about making improvements or adding new requirements?

Products built on **industry - standard platforms** with **open architectures**

This creates wide availability of technical experts, both in-house and third party who can develop (and troubleshoot!) on that architecture and improve your specific implementation without necessarily locking you into the vendors professional services and bandwidth. These platforms offer tools that allow customization to elements such as forms, workflows, dialogue boxes, reports and altering the look and feel of the interface itself in accordance with your needs.

Available modules, **functionalities**

Say, for instance, that a company desires to extend the platform, adding a full project management module, or perhaps a method to automatically manage Sales tax in the 6,000+ zones in the US. With a proprietary system, the vendor would be called in to build these features, generally charging a substantial fee to create the integration. With an open platform, a company can find an experienced and competitively priced developer to do the work.

Vendors with a **comprehensive** and **well structured discovery process** to identify your detailed workflows and business requirements

Search for vendors who can provide a very detailed and comprehensive process for gathering your requirements and needs during the discovery and evaluation calls and who can develop a detailed statement of work/functionalities that will match your existing/identified needs but also provide the flexibility and transparency when considering or adapting to your future needs.

2 **Implementation** Time

As David continues with the rollout, he realizes that information, input and approvals are required by many stakeholders. All these people are very busy, have limited resources or cannot necessarily produce the information in the format and time required. One delay often has a trickle effect and delays the whole process.

In addition to fighting for scarce resources and time, the growing customization requirements cannot be met by the internal team further slowing the process.

Even when David accepts the high price tag for the vendor's professional services team, the lead time required in the scheduling of these resources is high and creates even more delays.

Although implementation is often planned in stages, the actual time to completion is often close to a year...and sometimes even longer.

Without the ability for a company to adjust and improve on its own configuration, data import, workflow analysis and documentation, the sole reliance on the vendor will likely lead to a long, drawn-out implementation.

"Although implementation is often planned in stages, the actual time to completion is often close to a year... and sometimes even longer."

So what should you look for to avoid the mistakes that will lengthen your implementation time?

An application built on a **widely deployed** and **standardized platform**

This means that if, for instance, about 80% of the application uses the platform's standard building blocks and offers easily customized components (changing settings rather than actual coding), there is only 20% remaining for third-party or in-house developers to tweak in a rapid-development environment.

Detailed and customized **implementation processes**

Vendors who can provide the know-how and processes for your internal implementation will save you considerable time. Key factors to consider are indications of time requirements, to governance, suggested resources and detailed guidelines for testing, deployment, training, troubleshooting and other.

Efficient online collaboration for internal and external parties.

Look for vendors who can provide the whole implementation process and project management in an online collaboration system that allows for timely, efficient and effective task assignment, communication, milestone tracking, file sharing and resource tracking.

3 **Third Party** Integration

David finally manages to define all the workflows and business requirements (existing and new) and has the configuration of the base product under control. However, he now faces probably the most expensive, high-risk stage: connecting the new system to the company's existing data and applications.

> ***"The process of extracting data to port into the new system (work orders, accounts, agreements, contacts, parts, resources, etc.) is going to be very challenging and time consuming… years worth of data need to be migrated!"***

Porting all the data completely is rarely the solution as substantial investment has gone into the development of the applications, and staff is trained in their use. Connecting these systems to the new product, which requires ongoing two-way data transfer, is by no means simple. At times, it is limited by a vendor's proprietary architecture and it often requires expensive "approved" connectors.

David also does not realize that the process of extracting data to port into the new system (work orders, accounts, agreements, contacts, parts, resources, etc.) is going to be very challenging and time consuming…years worth of data need to be migrated! This involves a manual process that includes extracting info from different sources aggregating, consolidating, reformatting, and cleansing the data prior to importing it to the new system. He does not have anyone on his team with the bandwidth and expertise to do this… and the project continues falling behind schedule.

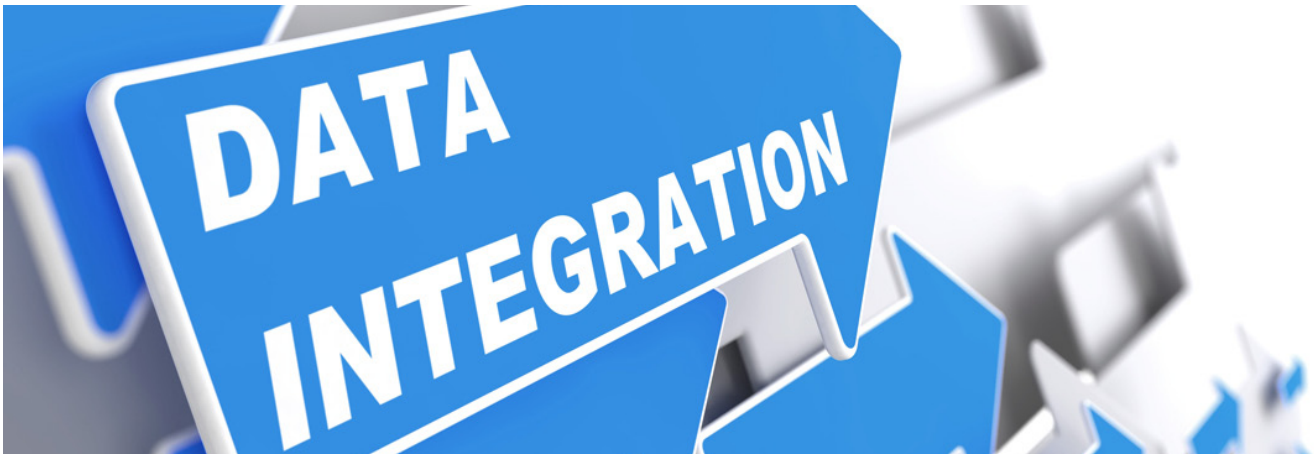
So what should you look out for to avoid mistakes with regards to third party integration?

Open platforms with **built in connectors** or **third party connectors**

With an open platform, there are many ways to integrate into your existing applications and data, with some connectors built-in and some sold by third parties. And of course, the larger, well-known architectures offer a library of internal connectors: E.g. .NET, SOAP, XML, file import and a wide availability of popular middleware that have earned reputations as robust and dependable tools.

Data preparation and **import guidelines**

Look for vendors who provide guidelines for preparing the data and can provide knowhow to make the whole data preparation/adaptation process smoother, faster and less error-prone.



4 Mobile Applications and Updates

When David presents the mobile interface to his technicians, he realizes that the advantages presented by the HTML5 FSM vendor who touted the device agnostic rationale: simplicity, time and cost savings, also come with several disadvantages. HTML5 can prove problematic in areas of performance, security and limits the features the device can handle.

Facebook founder Mark Zuckerberg shared this feeling in a 2012 Techcrunch Conference: "Betting on HTML5 for the App is one of the biggest mistakes if not the biggest strategic mistakes we have ever made. On IOS and Android, you can do so much better by doing native work…"

David also realizes that the solution selected will only work in areas with good internet connectivity. Many of the locations his company services include remote areas or inside buildings and basements in areas with poor connectivity or no connectivity.

> *"Betting on HTML5 for the App is one of the biggest mistakes if not the biggest strategic mistake we have ever made. On IOS and Android, you can do so much better by doing native work…"*
> *- Mark Zuckerberg*

His field agents are unable to download information or synchronize changes to work orders, thus hindering some of the initial expected benefits.

The native solution, however, also posses some challenges when changes or updates are required. A change in a form, workflow, or dialogue screen calls for a change in each of the platforms before being published, increasing costs and delivery times. This is framed as "inevitable" and the cost of true optimization for each native platform.

So what should you look for to avoid mistakes with regards to mobile applications:

Native Apps with **richer features** and **usability**

It is certainly easier and less expensive to use HTML5 rather than building a native app for each type of mobile device but companies that have decided to invest in native apps are providing a richer, more dependable tool for techs on the road.

Mobile Apps that can **work without wifi**

A truly mobile solution should consider scenarios where techs cannot access the internet. This ability to access functions offline is critical to maintain productivity and results.

Central Mobile Management Console for across platform updates

Although not common, a truly commendable feature/option, is a central console where one makes a single set of changes and the system builds it into each platform, including Android, IOS and Windows according to its specific user interface paradigms! The changes are then published as new versions to the user base. This customer-centric approach keeps costs down, with time-to-deployment kept to an absolute minimum. Each version maintains the dimensions, UI and device features as appropriate, but can be enhanced and adjusted in a single action.

5 **Deployment** Decision

David and the IT department assumed that the FSM solution would be deployed on their servers, behind their firewall. With the latest round of cost cutting however, it is now uncertain that IT will have the resources to maintain the required systems. Unfortunately, the purchased solution contemplated client hosting and the required coding to accommodate this unforeseen scenario now translates into 6 additional months of coding and thousands of dollars in additional professional service fees and lost productivity.

> ***"This unforeseen scenario now translates into 6 additional months of coding and thousands of dollars in additional professional service fees"***

So what should you look for to avoid deployment decision deployment mistakes?

A **flexible approach** to deployment that can accommodate **changing needs** at a **reasonable price**

There is no one size fits all approach to software deployment. Whether you prefer software hosted behind your firewall, the Cloud, SaaS, or Private Cloud, every company has priorities and realities that make some approaches more relevant, and some less. Additionaly, dynamics within a company often change and the preferences and needs may change as well. For instance, a downsizing in the IT department, as seen in this case, warrants a shift from in-house software running on a server bank that needs to be maintained, to a SaaS solution that relieves the need to update software and operating systems, service physical servers, back up data, and maintain security.

When evaluating a vendor, ask about how many of these options they can offer, whether they offer substantial benefits (or downside) that are unique to each implementation, and how easy it is to migrate from one model to the other, should the need arise.

David: Lessons Learned

Stage 1

Bring your preliminary checklist to the sales meeting or during your web research, and compare the lists of features that most vendors offer. Educate yourself about all the different offerings and rule out the products that clearly don't match your needs.

Stage 2

Once you have chosen a few companies based on these preliminary lists, be sure to spend time with all the relevant areas and functional departments in your company to clearly understand every area's business needs and requirements. Use this Guide to assess each feature/option more thoroughly. Compare and "score" the technologies chosen, with regard to each of the 5 key areas. This process is not easy, will require time and coordination, but will be by far be the most important investment you can make with regard to your new field service management decision and implementation.

Are you in charge of evaluating and proposing a Field Service Management Solution?

Find out more about how eBECS and FieldOne work together to deliver world-class Enterprise Field Service on Microsoft Dynamics CRM, the world's most configurable business and mobility platform.

Call us now on +44 (0)8455 441 441

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