



Power Up Your Field Service

By Rob Sombach

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"Lightning Copier Company," a young but fast-growing office equipment dealership, has a problem. It can't keep up with its own success. Using Excel spreadsheets, white boards, sticky notes and fallible human memory to manage an expanding customer base just isn't working anymore. There have been mix-ups in scheduling, inventory gone astray, slow-downs in responses to customer calls. The company's stellar reputation for service is starting to slip.

The company is hypothetical, the situation all too real. As a provider of service management software (Miracle Service), I have the satisfaction of helping turn such situations around.

Sooner or later, any firm that has not yet automated its field service operations will run into trouble. The good news is that automation is much easier than many dealers realize and the productivity gains are huge. Automation software can smooth and improve every aspect of the servicing business — from getting technicians to the right place with the right parts on time, to managing contracts, inventory, billing and follow up. Plus, you get easy access to data on how the business is performing — information essential for planning, management and staying competitive.

Streamlining the service call

Let's look at how an automated system can improve service calls. When the customer phones in about a problem, dispatch has instant access to a wealth of information. The customer's profile, equipment, service history, contract details, alerts, SLAs, service bulletins and preventive maintenance due — all show up on screen at the touch of a key. Such information allows the dispatcher to respond to clients knowledgeably and determine action needed efficiently and fast.

The next step, scheduling the technician, is streamlined too. Another mouse-click produces a visual display of technicians' schedules to see who is available to do the job. A work order with multiple tasks and multiple technicians can be generated in seconds, then printed, faxed, e-mailed, sent to a Blackberry or a cell phone. Both the technician and the customer can receive the work order right away and the dispatcher can monitor all service calls in progress.

Taking it a step further, systems that allow customers to place orders or open service calls directly through a web portal not only provide more service, but also boost efficiency. When customers can directly request service, order parts, view jobs and review sales orders anytime through the web, dispatch volumes go down and response time speeds up.

Good automated systems are proactive too, alerting your field service department about preventive maintenance due for each customer's equipment.

Those are just a few of the tools to help ensure:

- Improved first-call resolution
- Increased number of jobs handled per day
- Fewer errors
- Full customer satisfaction
- A service department that stands out from the competition

An automated service management solution that also tracks inventory, monitors metered billing and contract renewals and handles other kinds of invoicing will further improve service department performance.

Powerful management tool

A big part of any dealership automation software is the Management Reporting it provides. The systems allow you to quickly view data on all parts of your operation — sales, service, inventory, equipment and technician productivity and service contract profitability. They provide the analyses you need to determine what's working well and what needs attention.

This is one of the features most appreciated by Gina Mitchell, President of Office Equipment Source (OES), a New York-based authorized Xerox dealer, providing a full range of office equipment and maintenance services. OES implemented a service management solution early on in its development — a move that helped the firm improve its service levels and bottom line.

"When you know the profitability of every one of your customers and service contracts, then you can respond accordingly," Mitchell says. "If you don't have that information, you can't deal with the issues and risk losing money on a maintenance agreement."

Getting started

So why do some firms delay automation? They fear it will take too much time. But implementing a service management software solution doesn't have to be complicated. Many of our customers are up and running and using the system within a couple of days. The key is a system that is flexible, allowing you to add on functionality as you need it, to grow the software as your business grows. For example, if you have an accounting program that works well for you, you shouldn't have to change it. By using a service management software that integrates with your existing accounting system, you eliminate the extra cost and learning curve involved in taking on a new accounting program. The switch to automation will be that much faster and easier. And you should be able to count on help from your automation software provider. All good automation software companies will try to ease your transition — from importing your data to on-going training and support.

Is the investment worth it?

You don't have to buy a large, complex software package to get the benefits of automation. An automated software solution tailored to your needs is less costly than you think and can deliver a quick R.O.I. Look into what resources are available. One example is Miracle Service, where you may see savings of up to \$700 per month per technician.

Even factoring in the cost of the software, any on-going maintenance costs and staff training time, an R.O.I. of less than six months is very common. After that, it's all money in your pocket. As Gina Mitchell of OES says: "We really couldn't afford not to automate. It's the only way to stay on top of things and keep on growing."

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