Five Things to Consider When Developing Your Mobile Field Service Strategy

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THE SERVICE BUSINESS is on the move. To ensure a happy and satisfied customer base and an efficient field service team, the option of employing mobile technology is no longer considered "nice to have."

It has become a necessity to stay competitive.

Smartphones like BlackBerrys, iPhones and Androids as well as other mobile devices such as iPads have contributed to the momentum causing businesses to go mobile. Millions of individuals prefer these devices for personal use, and their preference has spilled over into the workplace.

Major productivity and profitability gains are possible when service departments use mobile devices. Just as important is the marked improvement in customer satisfaction.

You could say that mobile comput-ing is the biggest innovation in business processes since the personal computing revolution. As a mobile solutions provider for service management software, we've seen firsthand how innovation of this magnitude has opened the door for new thinking and new ways to improve field service operations that result in a competitive advantage. It also raises some issues that companies need to consider when implementing mobile technology. We have discovered that the five most important issues are:

1. CHOOSING THE RIGHT TECHNOLOGY

Smartphones, tablets, touch-screen devices and hybrids like the ASUS Transformer are hitting the market at an accelerated pace as manufacturers of mobile equipment compete with each other. When evaluating the best option for your company, consider what you need today … and in the future.

The technology inherent in each device is quite different. A browser that works well on one device may not work as well on another. Consider what features are critical for your individual business. If, for example, you need the ability to capture digital signatures, then you need to choose a device with touch-screen functionality. Some devices, such as older BlackBerry smartphones, won't support this feature directly.

You should also consider the screen size and layout when choosing a mobile device and a mobile application. While smartphone/PDA devices are convenient and easy to carry, they have much smaller screen displays than laptops or tablets. This will limit the detail available on a single screen and increase the number of screens a user will need to navigate. Devices with larger screens, such as laptops or netbooks equipped with wireless cards, will provide users with a more traditional view; however, battery life can sometimes be a concern. We also hear from companies that want applications that are supported by both laptops and smartphones/PDAs. This is important when technicians need to access the network using different devices.

Regardless of what you choose, it is important to confirm that your service management software is compatible with the device you want to purchase and that it will

work with multiple device types (iPhone, Android, tablet, laptop, etc.), should your team use a variety of devices.

2. B.Y.O.D. (BRING YOUR OWN DEVICE)

People are getting the latest leading-edge technologies for their personal use and want to use those devices for work. There are both opportunities and challenges associated with this growing trend, including the reluctance of some IT professionals to accept a mix of devices. When allowing personal devices to connect to company data and network resources, security becomes a big issue. If you decide to go this route, it needs to be done with careful planning. You should establish a formal set of company policies regarding devices you support, how they are

cellular service. In these cases, a certain amount of company data is stored on field service technicians' devices so they can complete their calls and record essential data. The data remains on the devices until the technicians return to an area that has a network available and they can update their HO database.

There are some simple procedures that can be put in place that affect the security of your data. In addition to "securing" mobile devices for authorized users, there are also some considerations regarding the type of network that would be optimal, such as a virtual private network.

4. BACK-OFFICE NEEDS

When considering mobile technology for your service department, you should consider two very important

completed service tickets, reducing the time to invoice and increasing the accuracy of information.

5. MOBILE APPLICATION DESIGN

The mobile application for your field service team needs to work specifically with the mobile devices it will be using so that the processes and functionality flow naturally with little additional training.

Consider the level and type of data entry required. Is the application mostly checklists and selection boxes, or is detailed information required? On-screen or smaller PDA device keyboards make data entry more difficult, so users tend to avoid providing all of the detail needed. If detailed information is important to your business, the application should be designed to facilitate this.

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to be used and what the company's responsibilities are when it comes to costs, support and troubleshooting. It is critical to your success to establish these policies and communicate them to all employees.

3. DATA SECURITY

One of the biggest issues that must be dealt with is the security of your company's confidential information in case a mobile device is lost or stolen. First, make sure you know what (if any) information is being stored on devices. Many mobile applications connect to the company's database without storing any data on the device itself. Other mobile applications, however, do store data on the device, allowing these applications to work even in remote or controlled areas where there is no Internet or

components: the back-office service management software/ERP and the mobile application or portal that connects to it.

The mobile component provides field technicians with the tools they need to quickly and efficiently complete their jobs. With instant access to information (such as their job list, in-depth customer and equipment service histories as well as parts visibility) and the ability to update service tickets and order parts while in the field, technicians can provide faster and better customer service.

Traditionally, one of the biggest challenges for management and office staff was the lack of real-time visibility into field operations. With today's service management and mobile solutions, they now have access to immediate status updates and

Going mobile

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Developing a comprehensive mobile strategy, having a clear understanding of all the issues involved and choosing the right mobile platform (devices and software) for your company will make the transition, and future, of mobile computing in your company a successful alternative to existing practices. ⓘ

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