



Transforming Your Field Services

A Vision33 eBook

Manage every aspect of your field service business, including accounting, CRM, stock control, and production, with one integrated solution.

SAP Business
One

SAP[®] Business
ByDesign

Introduction

Field services is no longer a costly afterthought or painful necessity—it's a significant differentiator and source of growth for companies. This change is driven by the perfect storm of market conditions, including:

- A gradual move from product to services offerings
- Increasingly sophisticated and connected industrial equipment
- Technologies like the internet of things (IoT) opening new doors for automation and equipment performance management

Without 360-degree transparency and accurate information to unify front- and back-end operations, your field services organization can't keep pace with today's customer expectations of fast, accurate, and efficient field services.

Businesses winning with precise field services use an enterprise resource planning (ERP) solution to optimize work and resources, automate processes, and synchronize everything from services, sales, and billing to equipment, inventory, and tracking. The results are new revenue streams and cost efficiencies due to better field services.

The Three Barriers to Delivering Great Field Services

Customers value great field services experiences. **In 2022, 43% of customers switched products or canceled a contract due to poor customer service.**

Luckily, if you need help delivering precise field services, the three major barriers to success are easy to identify and address.

Barrier #1: No Digitization

Field services organizations have too much paperwork. While other business departments have digitized their data, many field technicians are at customer sites with folders and notebooks. Even progressive companies with advanced technologies sometimes deliver post-sale experiences using call logs in physical books or track scheduling on whiteboards.

The need for digital solutions is greater than ever. Organizations that use disconnected systems with manual processes and workarounds are seeing dramatically lower customer satisfaction and retention and higher employee dissatisfaction and turnover.

Barrier #2 : Limited Mobility

Customers expect technicians to have mobile apps with current and previous job details and access to information or other techs that might assist with the issue. After finishing the job, technicians should be able to use mobile apps to add notes to customer files, invoice immediately, and get signatures in real-time. If your technicians can't do these things, they're falling behind.

A digital, mobile environment ensures you schedule and track jobs/people so the right technician is onsite at the right time for the right job. Without precise mobile tracking capabilities, field teams can't meet timing or services expectations, and technician utilization rates drop, turning what should be high-profit services into losses.

Barrier #3 : Inaccurate Scheduling

Field services organizations often struggle to schedule accurately because they lack automation to:

- Predict call and transit times
- Prevent double booking
- Align assigned technicians to jobs' required expertise
- Integrate availability with workers' schedules
- Alert workers to schedule changes
- Guarantee service delivery windows

These three barriers—no digitization, limited mobility, and inaccurate scheduling—negatively affect the customer experience. Rather than driving long-term customer value (LTV) and building on positive experiences to create up- and cross-sell opportunities, the barriers drag down profitability and cause customer churn.

Companies that modernize their field services with ERP gain a tremendous competitive advantage and multiple ways to earn more revenue, including selling:

Additional Services	Preventive Maintenance
Spare Parts	Refurbishment Work
Equipment-as-a-Service Contracts	

Many of these potential revenue streams were once considered cost items. Today, they represent a massive opportunity to transform field services from a cost center to a differentiating revenue generator.



Making the Right Changes to Win in Field Services

For businesses that recognize the value of having an ERP solution to unify their business data and processes, SAP provides two field services solutions perfectly suited to small and mid-sized businesses: SAP Business One and SAP Business ByDesign.

Both solutions improve field services by providing critical capabilities around real-time reporting, inventory management, and more. Unlike ERP systems for large enterprises, SAP Business One and SAP Business ByDesign make it easy and affordable to manage field services operations. Both solutions integrate and synchronize every aspect of your business and provide vital real-time information for fast, informed decisions.

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|---|---|---|---|--|
|  |  |  |  |  |
| Reporting | Inventory | Integrations | Trends | Billing/Invoicing |
|  |  |  |  |  |
| Track Equipment | Workforce Management | Insights | Service Record | Sales |

Whether you choose SAP Business One or SAP Business ByDesign, you quickly gain an integrated ERP solution that optimizes work and resources, automates processes, and offers 360-degree transparency and accurate information that unifies front-end operations to deliver precise services.



Breaking down the three barriers to great field services delivery

The benefits of having digitization, mobility, and accurate scheduling/tracking in SAP Business One and SAP Business ByDesign include:

Mobile Services

- Eliminate paperwork
- Reduce downtime and maintenance
- Automate critical operational reports
- Reduce manual processes
- On-the-go selling
- Up-to-date service records
- Capture data between mobile and back-end systems in real-time
- Offline usage
- Service call signature capture

Workforce Management

- Route and schedule automatically
- Manage a changing workforce
- Monitor schedule compliance metrics of planned vs. actual work completed

Traceability/Tracking

- Track field employees
- Track equipment

Customer Self-Service Portal

- Automated billing at end of service
- Billing history
- Quoting

Enable your technicians.

Give technicians the tools and information they need to do their jobs better. Mobile apps show them job details, confirm their work, and move them on to the next job worry-free. Mobile work tools put intelligence at their fingertips, automate tasks via mobile and augmented reality, and ensure the safety of themselves and their work environments.

Provide a single source of truth.

Field services thrives when technicians have the most up-to-date information. By bringing all the pieces—sales, services, warehouse, and finance—together with an ERP, you can get such tight integration that when technicians work and book time, it triggers an invoice, surfaces an outstanding order book, or alerts the team that the customer is behind on payments.

Optimize inventory management.

Track equipment in use and ensure jobs are scheduled when the right equipment is available. This is especially critical during peak seasons when companies struggle to complete customer jobs on time due to out-of-stock parts and materials. SAP Business One's and SAP Business ByDesign's tracking and control features enable you to track tools and repair parts across multiple vehicles and warehouse locations, saving wasted trips and minimizing expenses. You can even track the profitability of inventory items in relation to service, maintenance, and customer transactions.

ERP turns inventory frustration into customer delight

What if an onsite technician needs an unforeseen part? Thanks to ERP, the technician can quickly see if a nearby technician has the needed part, arrange a rapid part transfer, and complete the job. This maximizes technician uptime, improves customer satisfaction, reduces unnecessary travel, and saves money.

Milestones of Automation in Field Services

As with any transformative effort, modernizing your field services requires a **'crawl-walk-run'** approach.

Crawl

In the 'crawl' phase, you'll establish your database—the foundational element behind unifying all business data and processes.

The database will contain field services information such as:

- Predict call and transit times
- Prevent double booking
- Align assigned technicians to jobs' required expertise
- Integrate availability with workers' schedules
- Alert workers to schedule changes
- Guarantee service delivery windows

Having this information organized and readily available ensures field services teams know what work they need to deliver, how to deliver it, and how to report on it when finished.

Walk

In the 'walk' phase, you integrate multiple functional areas with field services, including sales, customer relationship management (CRM), inventory, and capacity and workforce/skills management.

This enables you to:

- Easily schedule your technicians
- Confirm the work technicians are performing
- Know which parts your technicians have in their trucks
- Automate all information through to accounting
- Accelerate processing and billing
- Record work hours in real-time in your mobile app

The visibility you gain at this stage also indicates if you need additional internal resources or subcontractors to complete jobs.

Run

Completing the 'crawl' and 'walk' phases positions you to drive KPIs (key performance indicators)—like profitability and customer satisfaction—and create visualizations for growth in the 'run' phase.

This phase takes your field services management (FSM) to the next level by moving your organization beyond automation, integration, and ERP.

Best-in-class FSM solutions like SAP Field Service Management bring critical components together so you can think bigger and reimagine ways to drive revenue via field services.

FSM innovations are abundant in the 'run' phase, including:

- Artificial intelligence (AI) for replenishing inventory
- Automated technician scheduling
- Customer self-created service orders (via QR code or scanning)
- Automated planning based on customer QR codes
- Automatic job-plan sharing with customers and technicians

When these activities become standard in your business, you'll be positioned to sell your product as a service. For example, you can lease out equipment rather than selling an entity. Or, if you're an expert in service provision and have ERP-based analytics, you can monitor field equipment—yours and others, including your competitors.

Don't forget IoT for efficiency gains

When you connect equipment to the internet, IoT allows that equipment to send data points to your ERP, regardless of its physical location. This improves maintenance because the data enables the ERP system to launch automated workflows for proactive equipment upkeep.

Today, you can geo-track your technicians and their vehicles to know where they are and ensure they take the best routes. Tying this data with all your other FSM and ERP data makes it easy to optimize each day's physical planning, scheduling, and resourcing.



Conclusion

Transforming field services is a necessity because customers expect product companies to apply new technologies to deliver faster, more efficient post-sale services. Beyond providing basic field services, businesses that seize the opportunity and use the right technologies can dramatically differentiate themselves from competitors and drive more profitable business growth. By progressing from product sales to product-as-a-service, you can gain long-term recurring revenue from customers that used to be purely transactional.

Your evolved field services will also help you build and protect new revenue streams that become insulated from the 'down cycles' that occur during inevitable recessions or one-off events that put new initiatives on hold.

Build a more profitable future based on the services expertise you already have

Contact [Vision33](#) to begin your journey to an integrated field services organization and position yourself for continued growth with SAP's leading technology solutions.



Vision33 transforms business processes and results for customers by delivering value through the promise of technology and its benefits for growing businesses. For over 30 years, Vision33 has helped companies integrate and automate their processes and applications to better serve their customers, employees, and stakeholders. The technologies may have changed drastically in 30 years, but Vision33's mission has never wavered.

With over 1,000 customers worldwide, Vision33 helps businesses make successful technology investments to outperform their competition and lead their industries. Vision33's nearly 500 employees offer product expertise, business experience, and innovative technology leadership. Whether it's a global company with 100 subsidiaries or a small business, Vision33 works alongside every customer to meet their goals. Vision33 also has formal partnerships to resell, implement, and support leading ERP applications, is a leader in cloud deployment, and has developed exclusive products, including The Saltbox Platform (saltbox.io) and iDocuments (idocuments.io).

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¹New Data Shows Post Pandemic Impact of Customer Loyalty Resulting in Increased Likelihood to Churn from Poor Service (prnewswire.com)