

NetSuite User's Guide to Field Service Success

How to take advantage of field service
technology to become an industry leader



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INTRODUCTION

Now in 2020, technology impacts nearly everything we do. From ordering groceries online to meeting up with friends and family by video conferencing, technology has become enmeshed with our daily lives.

52%

of companies still use manual methods for most of their field service tasks

But the same can't be said for most field service organizations.

The truth is **52% of companies still rely on handwritten paperwork and manual processes for most of their field service tasks**. If your service business falls in this category, you should see this not as a negative statement, but as a tremendous opportunity.

Because this fact shows that at least half of your competitors are using manual methods, too. And that means you should **take advantage of technology now before your competitors and be the leader in your industry**.

But there's a catch. It's not like you can just snap your fingers and all your field service tasks are completely automated and digital. It can be a long journey to evolve your service business, with costly potholes along the way, but the results are well worth the effort.

So where should you begin on your digital field service transformation?

This guide provides tried-and-tested strategies to elevate your field service performance.

Become an industry leader using purpose-built field service management tools connected with your NetSuite ERP.

The Impact of Technology on Field Service

Savvy customers require higher equipment uptime and on-demand access to service history. And field service technology has evolved to meet these needs.

Here are a few technology advancements used by leading field service companies.

CUSTOMER COMMUNICATION



Confirm appointments by phone

Confirm appointments by automated text message



SCHEDULING



Schedule service weeks in advance with wide ETA

Request service online with customer portal



PROACTIVE REPAIR



Repair after equipment failure

Repair before failure with IoT connectivity



PAYMENT



Mail invoices weeks after service

Collect payment on site through mobile app



SELF-SERVICE TOOLS



Address customer queries by phone and email

Provide self-service tools with customer portal



Get started on your field service technology evolution with these three steps.

Step 1: Raise technician efficiency

You know your technicians are hugely important to the success of your field service business. **They might be the only face-to-face interaction your company has with your customers.**

That's why 89% of service leaders agree that field technicians are a reflection of their company's brand.

89%

of service
leaders agree
field techs
reflect their
brand

Every interaction your technician has with a customer can directly impact the business relationship, either in a good way or a bad way. And as the manager, it's up to you to make sure each interaction is a positive one.

Here's how to get your techs working as efficiently as possible while empowering them to grow the customer relationship.



Reduce
unproductive
technician time



Repair
revenue leaks



Tear down
data silos

Reduce unproductive technician time.

77%

of field service costs are used for parts and labor

Many field service businesses struggle to keep their labor costs under control. TSIA's State of Field Services 2020 research report noted that labor and spare parts represent 77% of total field service costs.

Yet in 2019, TSIA found the number one business challenge for field service organizations was labor optimization. So it's clear that to control your field service costs, you must provide the tools and training technicians need to work efficiently and independently in the field.

Here are a few ways to boost technician productivity with NetSuite-connected field service management:

Get a window into the field with automated status updates.

With a visual scheduler, you can take the guesswork out of technician tracking.

You can see real-time status updates when your technicians are in transit, start and finish tasks, and take breaks.

Match technician skill with customer need for faster issue resolution.

By using skill set filters in a visual scheduler, you can dispatch the right tech for the right job, every time.

For example, you can send senior techs for complicated emergency repair and less experienced techs for simple oil changes.

Provide rapid response to sales orders with integrated field service.

Connect your NetSuite quoting and sales information directly to the field for faster customer resolution and higher service revenue.



Repair revenue leaks.

As a service provider, you know all about fixing your customers' equipment. But what about repairing your service revenue?

If your team misses adding an hour of labor or a spare part to a work order, that's no big deal, right?

But that's stuff you're giving away for free if it's not tracked back to NetSuite.

Capturing service revenue using paper work orders is like trying to fill a bucket with a hole in it. No matter how much you fill the bucket, you're still losing potential revenue.



Stop revenue leakage.

Your first action should be to stop the leak, by going paperless and integrating with your NetSuite ERP. Give your team the tools they need to log everything that's billable so you're getting paid for the service and parts you provide.

Fill the revenue bucket with role-specific tools.

With the revenue leaks repaired, you can focus on filling the revenue bucket. Now you can ensure each of your team members has what they need to do their job effectively.



That means your techs have access to customer service history and can submit work orders and timesheets – all through their mobile device. And your scheduling team has automatic updates from your techs in the field, so they're always in sync.

By connecting your NetSuite ERP to the field, you can empower your field technicians to grow customer relationships. When they're on site with customers, they can recommend upsells and extended warranties for higher equipment uptime.

And all the data collected by techs in the integrated mobile field app automatically syncs back to NetSuite, ready for invoicing.

Tear down data silos.



It can be a nightmare trying to manage disconnected service silos within your organization. As the service manager, everyone's looking to you to make strong decisions and fix their problems while keeping the organization moving and profitable.

By breaking down silos and connecting them across your organization, you can **move beyond reacting to issues as they occur**. You can start strategizing how to improve, not just maintain, service levels and profits within your organization with NetSuite-integrated field service management.

Though automated "set it and forget it" alerts, you can make sure every department is connected.

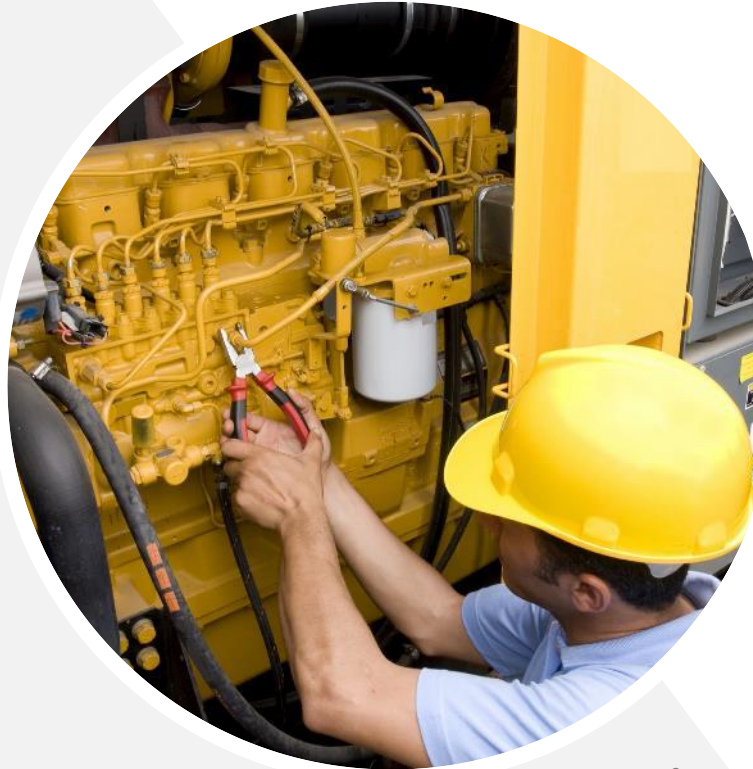
Let's take inventory management for a generator distributor as an example. Every time a generator installation is scheduled, your inventory team can receive an automated alert to order more generators. Now you're no longer responsible for making sure that all the information gets to the right people.

These automated communications happen in real-time.

And **information is synced between NetSuite and the field service management app, allowing everyone on your team to have access to the same information.**

With alert triggers and workflows set up across your organization, communication becomes automatic and instantaneous.

And your service operation runs like clockwork.



CUSTOMER SUCCESS STORY



THE CUSTOMER

- Commercial and residential plumbing services
- 12+ field technicians servicing eastern Michigan

Back when Shelby Mechanical was a smaller business with only one location, they relied on technicians filling out paper invoices in the field. This paper-based process worked just fine when they had only a few technicians on staff. But a lot has changed since then.

With many more technicians and two locations, Shelby Mechanical fulfilled dozens of field service requests every day. Business was growing, and customers were happy.

But they still depended on handwritten paper invoices, leaving the back office team drowning in paperwork and struggling to get invoices out quickly.

Shelby Mechanical needed to scale their field service operations to support their growing business and increased customer demand. And get rid of paperwork for good.

Since implementing Service Pro for NetSuite, Shelby Mechanical has completely streamlined their entire field service operations, from the initial service call to customer payment.

 **Read the full story here**



Instant dispatch communications



NetSuite-integrated service orders



Comprehensive data on mobile



Technicians can see their appointments as far out as they're scheduled.

This helps them know what materials they'll need and gives them the opportunity to prep for their jobs.

Step 2: Optimize back office processes

After raising the productivity of your field team, your customer-facing field technicians are now working as efficiently as possible. **Now you can speed up the behind-the-scenes processes, like scheduling, dispatching, and billing.**

#1

selection criteria for field software is the ability to integrate with back-office systems

Though they may never meet in person, your back office team has a big impact on your customers' satisfaction and loyalty.

By optimizing scheduling, billing, and communication processes, you can save your team several days' worth of manual data entry duties. This frees up your back office team to focus more on growing existing customer relationships and bringing in new customers.

And that's likely why the number one most important factor for companies selecting a new field service system is the ability to integrate with their current back office systems. Keeping your back office running efficiently depends on it.



Speed up
billing



Eliminate
duplicate
data entry



Streamline
field-to-office
communication

Speed up billing.

It's obvious that the longer it takes to prepare and send out an invoice, the longer it takes to receive payment.

Research suggests that the **average time for field service organizations to get paid is 34 days**. That's because paper forms and work orders slow down the process of information management and data entry.

These processes, in turn, increase the amount of time and resources spent translating handwritten documents and recording billable hours.



Eliminate your need for physical paper forms and speed up the payment process with NetSuite-connected field service management.

Automating and integrating these processes allows information to flow more rapidly.

Instead of taking more than a month, **your end-to-end service process, including dispatch, service, and payment, can all happen on the same day.**



Eliminate duplicate data entry.



Many service organizations have been dependent on paper for decades. They stick to the phrase, "if it ain't broke, don't fix it."

Since their outdated processes make it difficult to detect trends, these companies are falling behind their technology-embracing competitors.

With field service management software integrated to your NetSuite ERP, you can get rid of paperwork for good.

And integrated software offers many benefits for both your techs in the field and your back office team.

Your field technicians have everything they need to get the job done right the first time, all from their mobile device.

There's no need to stop in the office to pick up or drop off paperwork.

Your back office team doesn't have to waste time re-entering data collected in the field and deciphering messy handwritten forms.



Streamline field-to-office communication.

Leading service companies empower their field technicians and back office team to be in lockstep to best support their customers.

But if your team still uses whiteboards, multiple phone calls, and paperwork, then they're likely spending more time on internal communication and data entry than providing excellent customer service.

And now with **more than 16 million US workers working remotely**, communication between team members is even more challenging.

From our recent survey of service companies, more than 90% stated their office personnel and technicians are working fully remote.

90%
of service
companies are
working fully
remote



By using manual, paper-based methods of collecting information, service organizations are likely missing out on opportunities to grow existing customer relationships. And that means a loss of potential revenue, too.

All the information your techs gather at customer sites through the mobile field app automatically syncs with the back office software.

This provides your office personnel with a real-time window into the field, almost as if they're on site with the techs. Now your techs and administrators are always in sync.

CUSTOMER SUCCESS STORY



THE CUSTOMER

- Natural gas distribution servicing and sales
- 15+ field technicians servicing northeastern U.S.

Pipeline Equipment Resources Company's (PERC) business system had worked for them for a while, but cracks started to show when they found keeping the system up to date to be difficult and expensive. In addition, manual processes caused delays in operations and inaccuracies in inventory tracking.

Since implementing Service Pro and NetSuite, PERC has already seen vast improvements in their scheduling and tracking of appointments, as well as a 50% decrease in the time required to prepare and send invoices.

Previously, PERC's turnaround time for invoices was up to two weeks, causing delays in cash flow. Now technicians can enter notes about what happened during a visit and what equipment was pulled from the inventory, and that information automatically syncs across the system. The reconciliation team has all the information they need at their fingertips to create invoices almost immediately after the visit.

The result? Invoices are now completed within days - not weeks - which has greatly improved PERC's cash flow.

 **Read the full story here**



**Unified
information**



**Seamless
invoicing**



**Integrated
inventory tracking**



MSI's solution just
seemed tailored
to how our
business works.

Step 3: Elevate the customer experience

One investment that will always provide solid ROI is in the customer experience. The truth is 80% of customers say the experience a company provides is as important as its products and services.

80%

of customers say
the experience
is as important
as the service

A good customer experience can be hard to define. It's not just about responding effectively to complaints or sending a nice holiday gift at the end of the year. But you know good service when you experience it.

Exceptional service that delights your customers enables them to pay you for your services. And they're glad to do it.

By providing a top-notch, real-time customer experience, you can expect to retain more customers, expand their relationship with you, and bring in new customers.



Shorten
ETA windows
for customers



Eliminate
unnecessary
return trips



Provide
real-time service
experience

Shorten ETA windows for customers.

Service response ETA is one of the most critical components of success in customer experience for field service providers.

If your service company relies on manual scheduling and task tracking, you might be taking a big hit to your team's daily productivity. **When dispatchers have to call techs with updates to the schedule, their time is taken away from more proactive, revenue-driving tasks.**

With a robust field service management system, you can automate manual, time-intensive scheduling tasks.

For example, **by using integrated field service, your field techs can receive real-time notifications of any changes to their schedule right on their mobile device.** There's no need for multiple phone calls back and forth, and both the dispatcher and technician can continue on with their daily tasks.



And the same process is possible when technicians update their status, too.

By using a mobile field service app, your technicians can update their status upon arriving at the site, starting work, and completing work.

With up-to-date information about technicians' whereabouts, your dispatchers can make smarter scheduling decisions and provide tighter ETA windows for customers.

Communicate and deliver within shorter ETA windows with a fully connected service team, from call to schedule and mobile technician.

Eliminate unnecessary return trips.

96%

of unhappy customers won't complain directly to the service company

Failing to get the job done right the first time around can seriously tarnish your reputation.

Did you know 96% of unhappy customers will not complain directly to you, but you'll lose the business of 91% of these disgruntled clients? Add to that the fact that they will tell at least nine to 15 people of their poor experience with your company.

That's a lot of potential business that you may be losing.

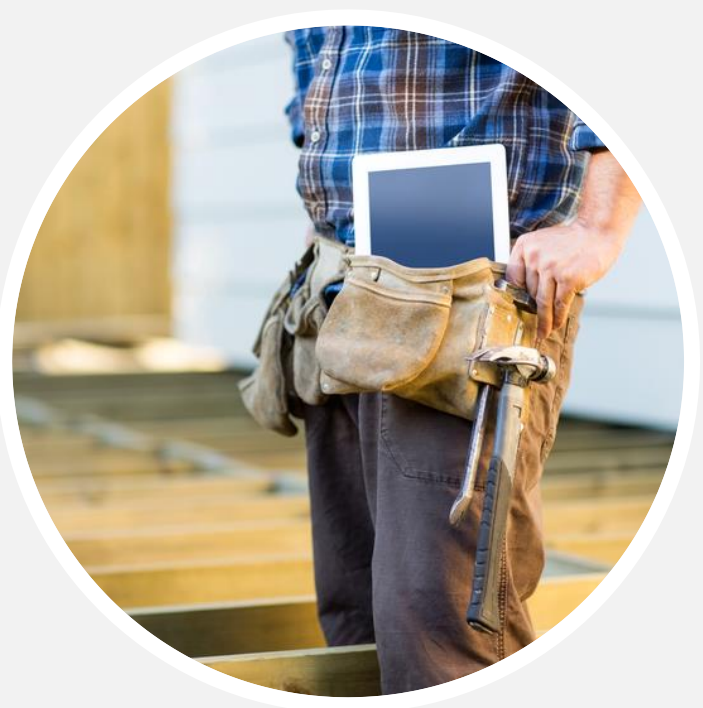
Pairing a mobile app for technicians with a visual scheduling tool is the first step to eliminating costly return trips. Then your techs have all the information they need to get the job done the first time.

Scheduling technicians without seeing their real-time location, status, and skills is like trying to build a house without a blueprint. You can certainly build the house, but it's probably going to take longer and may not achieve the desired result.

Having a fully-integrated visual scheduler in place allows the dispatcher to identify a technician with the correct tools, skills, and availability.

With all this information, your dispatchers are better able to match techs with jobs they are equipped for.

And **with the right technician at the right place and time, it's much more likely that the customer's issue will be resolved during the first trip.**



Provide real-time service experience.

Today, customer experience is tremendously important, if not the most important part of field service. In fact, 80% of service leaders say emerging technology transforms customers' expectations of their service organization.

It's clear that service providers have to evolve to meet customers' increased expectations, and technology providers need to step up to help them.

That's why **providing real-time, self-service features directly to your customers is now a requirement to be successful in field service.**

80%

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emerging technology
transforms customer
expectations



Using a portal integrated to your field service system and NetSuite ERP, your customers can view inspections and order notes related to any of their orders, all from one screen.

This allows your customers to quickly access and download attachments without having to drill into the inspections and order notes for each individual order.

When your customers can quickly find the information they need and continue on with their day, their own processes become more efficient. And you become their service superhero.

CUSTOMER SUCCESS STORY



THE CUSTOMER

- National equipment distributor and industrial services
- 250+ field technicians servicing Southeast Texas

To streamline their service operations, Waukesha-Pearce Industries (WPI) needed to **eliminate their paper-driven service processes.**

To optimize their technicians' time and provide even better customer service, WPI chose Service Pro as their field service automation software partner.

WPI now uses Service Pro to manage the complete field service experience, from scheduling to work orders to inventory.

It's not only internal stakeholders that have been impressed by Service Pro – **WPI's customers have experienced greater satisfaction** with their service as well.

Since WPI's customers are more satisfied with their services, they feel more confident with WPI's services.

As a result, **service sales have increased by an average of more than \$1200 per quote.**

 **Read the full story here**



**Digitized
PM operations**



**Real-time
field-to-office data**



**Advanced
reporting capabilities**

“

We have seen Service Pro change not only our staff, but maybe our industry.

CONCLUSION

Become the leader in your industry by taking advantage of field service technology now. **Start by selecting the right partner for your digital transformation.**

Field efficiency is MSI's sole mission. And MSI's Service Pro for NetSuite, cloud-based field service management software, helps companies **increase productivity by eliminating paper and automating repetitive processes.**

Having partnered with dozens of NetSuite users successfully adopt technology for their field service business, MSI has the know-how to help you achieve field service success. **To get started, request a demo now.**

FAST FACTS ABOUT MSI'S SERVICE PRO FOR NETSUITE

2015

NetSuite
partnership
established

20+

Industries
using
Service Pro
with NetSuite

50+

Shared
customers
with NetSuite

Ideal solution for firms performing field service work to
install, repair, maintain, and inspect in nearly any industry



Cranes



Generators



**Heavy
Equipment**



**Fire
Protection**



Petroleum



HVAC



**Raise field service, repair,
and inspection performance
with Service Pro**, cloud field
service management software
for NetSuite ERP users.

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