

# Service management buyer's guide



Finding the technology to meet your ambitions

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# Service management

## The heart of business growth

### Understanding what defines best-in-class service

**This buyer's guide will allow you to:**

- Understand the unique position that service should fit within the modern organization
- Identify the key capabilities that define best-in-class service
- Understand the implementation rigors that accompany service management deployment
- Align your unique service workflow and business challenges against the capabilities and configurations of a service platform.

The past few decades have fundamentally redefined the boundaries, perception, and expectations of what service delivery means for the modern economy. The days of localized, disparate support have in many instances been superseded by a coherent, connected strategy, and even within those small support offerings, the options and expectations for how service would be scheduled, how parts would be allocated, and how service itself is delivered has only grown more complex.



These business-level shifts have been driven by expanding computational power and connectivity. First through personal computers, then through mobile devices, and then through connected assets, the boundaries of insight have expanded greatly. This has allowed businesses to far more accurately predict job duration, asset failure, and scheduling conditions. It's also allowed businesses the insight to step away from old service models of repair, towards outcomes-based contracts that guarantee uptime and output.

The heart that beats at the center of all of these business changes is Service Management. Software that optimizes, tracks, and automates the delivery of service for businesses is by no means a revolutionary concept, but in the growing age of connectivity, the power and potential to leverage such tools strategically has increased substantially—as have the stakes that go along with it.

This report serves as a guide for businesses looking to navigate those opportunities. Whether you're looking to replace a service platform or implement a brand new solution, we'll consider the business impacts, the technologies available, and the strategies for implementation that will help you navigate the complex process of choosing a new service platform.

# Defining service

The key Software capabilities, and what they mean for your business

## Criteria for Consideration

Before we dig into the specifics of service excellence, let's start by looking at what compels businesses to invest in service in the first place. Service functions for businesses are so complex, so diverse, so tribalistic, and so disconnected that getting a piece of software that fits around all the flailing tendrils of your business is not as easy as installing a new piece of project management software.

Don't tell that to some vendors, though, who build their service software based on a binary checklist of service needs. Many companies, especially those new to the service game who are seeing the revenue potential of service management, build products with feature sets as basic as their other applications. This requires businesses to shove their service processes into a pre-built mold, which means that you have to saw off elements of your service delivery plan (sometimes entrenched with years of experience) to compromise to software limitations, or invest in even more products to get back to square one.

Because of this, service management vendors that simply have a long list of capabilities, even if those capabilities look particularly flashy in a demo environment, need to be held up to greater scrutiny. Will this parts management system work for the multiple tiers of service appointments that I deal with? Does this crew management system allow me to manage my workers the way that they actually work, or does it just throw names into a list? Does this optimization software manage the scope of global appointments that my company must have oversight for?

## Capabilities

When defining service management software, it's typical to measure the worth of software by the breadth of capabilities that are offered, but that can be very misleading.

So does that mean that depth of execution always trumps breadth of capabilities? Obviously not, but it's important to understand how the two areas complement each other. Then you'll need to take it a step further, and look at what embedded systems exist today, and how they can be integrated or deemed redundant. Then you need to look at your one, five, and ten-year plans for implementation and ensure that there's a development roadmap that matches up. Then you need to look at implementation, onboarding, the list goes on.

## The Key Capabilities of Service Management

When defining service management software, it's typical to measure the worth of software by the breadth of capabilities that are offered, but that can be very misleading. In 2007, an Apple iPhone and Motorola Sidekick both had web browsers, but there's no comparison between the depth of execution between the two, so everything here should be taken with a grain of salt.

So where do you even begin when defining the capabilities of service software? What is one expected feature that is so mature it's a lifeline for service businesses? What is the latest killer app poised to shake up customer expectations or save a ton of money? To cover all of this, we will massively oversimplify the nuances of service software by putting them into three broad categories (which we will then dissect): Service delivery, operations, and customer experience.

# Service Software Is Defined by Tracking, Organization, and Optimization



Customer Engagement



Planning & Scheduling Optimization



Not Connected Service



Reverse Logistics



Mobility



Service Pricing & Billing



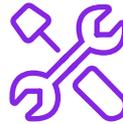
Remote Assistance



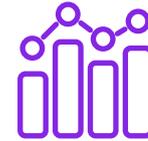
Warranty & Contract Management



Service Parts Management



Depot Repair Management



Performance Management



Service Project Management

## Service Delivery Capabilities

We'll start with the most basic set of capabilities, and usually where people start (and many end) when considering field service management software. This is about as boring as it gets on its surface: Contract management, appointment management, Service-level agreement management, and so on. These are the bread-and-butter service utilities, usually with a direct paper counterpart that they've been implemented to replace.

More interesting capabilities typically go beyond the act of cataloging service and serve to enhance service delivery. To borrow a phrase from Forrester Research, these would be "Business Technology" utilities rather than simple IT: tools to help win, service and retain customers. The most prevalent of these tools are things like knowledge management and on-the-job training utilities, which take many forms. We've spoken a lot about Augmented Reality recently and with good reason: it's a quick way to upskill technicians without having to over-encumber a business with a bunch of technological overhead.

## Operational Capabilities

For the purposes of this massive oversimplification, I'm going to limit this to the movement of people, tools, and parts through a system but here we're basically talking about one of my favorite topics: Optimization. Generally we speak about planning and scheduling optimization purely through the spectrum of technicians and appointments. Good systems allow appointments to be scheduled through multiple channels and optimize appointment delivery. The best tools can do that optimization quickly, and with the power of AI, and provide real-time updates as the nature of job delivery continues.

Further than that, parts and reverse logistics management also become necessary (and frequently overlooked!) pillars of optimization. Within that there are a wide variety of considerations, as well. Getting a full operational picture, end to end, is functionally the key to service success, and it's where a lot of companies fall flat.

## Customer Experience Capabilities

Yes—customer experience is important, but customer experience is not piloted exclusively from customer management utilities. The truth of the matter is that customer attrition doesn't come from customer relationship management in some sort of automated system, it comes from your technicians working efficiently and delighting customers through tools like zero-touch service and chatbots.

I'm by no means implying that customer experience is not important, and there are certainly transformative experiences to have within CX. Good customer experience utilities enable frictionless handoffs that guide the customer through the service lifecycle, but their main purpose is to automate redundant tasks and reduce the load for the back-office staff, which has its clear benefits and drawbacks.

Engaging and forward-thinking systems to resolve common issues and routine maintenance without tying up a line or forcing a customer to wait on the phone for a human. CX exists as a steward through the various service systems that you have, not as the centerpiece of service delivery.

## Capabilities Explained

In this next section, we'll look at each of these categories in ore detail, and explore many of the tools that make up the broader categories. We'll then go into what features and depth currently represent the best of the best. Is your business able to check all of these boxes? If not, what is missing?

## Service Delivery

| Capability                | What it does  | What defines best-in-class  |
|---------------------------|---|---|
| Service ticket management | Catalogs all active and closed tickets and ticket histroy across the service business.  | Leaders unify this process across all channels of service delivery and provide external services like performance dashboards, as well as automatic ticketing and closing.   |
| Pricing and billing       | Provide point-of-sale functionality, purchase order, and account functionality to field workers.  | The maturity of these systems means that all should have the ability to process purchase orders and credit transactions, build tabulated account views, and appropriately automate communication for late payments. |
| SLA management            | Incorporate and outline various contract requirements in the system and use them to inform and prioritize service delivery.                           | Automate SLA requirements into planning, scheduling, and routing; subdivide SLA requirements by region, business use case, or technician, and provide all necessary tools for outcomes-based service delivery.      |
| Warranty management       | Catalog and maintain records of product warranties and expectations.  | Automate renewal cadence, build complex repair-or-replace options for technicians to provide to customers.  |
| Performance management    | Log, analyze, and present technician performance across a variety of metrics that are prioritized by the firm.  | Consolidate data from not just the service practice, but across the serviceable assets and backoffice to provide a concise view of the business with minimal customization.   |
| Knowledge management      | Deliver on-site information to service technicians to ensure an understanding of repair processes, customer requirements, and business functionality. | Provide opportunities for shared view and augmented reality. Additionally, use IoT and appointment data to prepopulate the necessary instructions and guidelines automatically.                                     |
| Repair management         | Log, route, and notate all instances of on and off-site repairs, and benchmark that history against any client requirements.                          | Track repair process in real-time across channels, both internally, through dealers, as well as external partners.  |
| Asset management          | Review output and health of servicable assets in the field.   | Predict service interruptions and automate service appointments before an asset breaks down based on historical sensor data.  |
| Mobile field service      | Access to service management capabilities on a job site via mobile device, rugged device, or tablet.  | 1:1 mobile and desktop functionality for all systems, including knowledge management, parts management, and all aspects of service delivery.  |

## Optimization

| Capability                     | What it does  | What defines Best-in-class  |
|--------------------------------|---|---|
| Planning tools                 | Building long-term headcount and capacity plans for backoffice and field workers.           | AI-powered optimization allowing for multi-time horizon planning that extends past days, to weeks, months, and years, allowing businesses to set projected capacity and make decisions in advance.                                      |
| Parts management               | Inventory, location, and stock level tracking.  | Ability to track across warehouses, technician vehicles, depot, and any other location that parts may be found to ensure quickest turnaround. Part allocation recommendations built into the scheduling tool based on appointment data. |
| Reverse logistics              | Tracking, managing, and optimizing returns and repairs.                                     | Multi-channel visibility across internal and external depots and warehouses. Ability to evaluate repair efficacy for customers in real-time to help facilitate informed decisions.  |
| Driver routing                 | Maximizing efficient appointment delivery by reviewing appointment locations.               | AI-powered utilities to identify bottlenecks and inefficiencies in technician behaviors, ability to set business rules and prioritize appointments and benchmarks and route technicians to maximize performance along those criteria.   |
| Scheduling                     | Prioritizing customer appointments alongside service needs.                                 | AI-powered scheduling optimization that automates scheduling with respect to all SLA, regional, and incidental requirements and restrictions.   |
| Simulations                    | Field "what if?" scenarios and their impact on headcount, profitability, and other metrics. | This capability itself is typically a hallmark of best-in-class planning and scheduling optimization.   |
| Enterprise resource management | Management of internal business capabilities outside the direct delivery of service.        | Comprehensive lifecycle, performance and investment planning across all business functions in a unified platform environment.   |

## Customer Experience

| Capability                      | What it does  | What defines Best-in-class   |
|---------------------------------|---|--|
| Omni-channel contact center     | Provide multiple ways for customers to interact with the business after the sale has completed. | Unified call logs and chat histories are automatically applied to customer information; Channels include phone, online, MMS, and app-based messaging, enhanced by AI.                              |
| Chatbots and virtual assistants | AI-driven utilities for customer communications.  | Automated escalation and sophisticated voice recognition, ability to provide zero-touch appointment scheduling without the intercession of a human.  |
| Customer service CRM            | Customer profile and interaction management at the firm, business unit, and individual level.   | Automated functionality for routine service booking and marketing utilities.   |
| Unified desktop support         | Consolidated backoffice functionality in a single application.                                  | End-to-end compatibility with all utilities in your service stack.   |
| Customer self-service           | Self-resolution options for customers.  | Multiple channels of delivery, including phone, online, and mobile, enhanced through emerging tech where appropriate. Built-in triggers to transfer to technicians for more complex service needs. |
| Remote assistance               | Resolve service issues without dispatching a technician where possible.                         | AR-enabled shared view that goes beyond telestration to actual collaboration. The best of the best are further enhanced by IoT functionality.  |

# New implementation

Driven by servitization, or system consolidation

## Implementation Considerations

Given the unique complexities, customer lists, regional expectations, and cultural requirements of every business, no two service implementations are the same. Moreover, implementation for companies looking to upgrade their service platform are dramatically different when compared to businesses looking to deploy service for the first time. Let's look at new users first.

## First-time service considerations

While many larger organizations generally have a solution in place today, under many circumstances, even those solutions are more of a hodgepodge of utilities than a unified platform. Moreover, as businesses in traditionally product-oriented fields pursue and expand service functions, as has been an ongoing trend, more businesses will need to unwrap service management software for the very first time. And of course smaller businesses who have relied on pen and paper are understanding and embracing the importance of software for their own growth.

There are no shortage of shapes and permutations that businesses can take on their road to success, so mileage will inevitably vary. But, as we like to say, there are a few key components that will tie organizations together when they're looking at a solution for the first time.

## Map Every Millimeter of your Workflows

You need to understand every single element of what your service technicians, backoffice, and depot employees are doing before implementing a new tool. This ensure that the software that you're employing actually solves the real problems that employees are having, doesn't overextend into nonexistent issues, and is a tool that will actually be employed on a daily basis.

There are a few ways that you can make this work. One obvious element is choosing a development framework that involves frontline workers from the get-go. This will ensure not only an understanding of their duties, but also help make them advocates for the new software. Furthermore, rollout should be an event, with iteration and feedback loops an element of standard protocol. This makes sure the software if giving employees enough cover, and doing in a way that organically works alongside their job requirements.

## Make a Sunset Plan for Redundancies

So you're implementing a full-featured service tool, which has all the backoffice capabilities that we discussed earlier. However, you had previously been running a customer engagement tool designed for small businesses that indexed all your customers, saved their payment info, their work history, and so on. This is now a redundant tool alongside your broader software investment. What do you do? Do you cut and run, forcing customers to re-enter their data manually? Do you continue to use the old tool, running (and paying for) software that does not integrate? Do you port over the data and sunset the old tool? Do you find a way to integrate the old tool into the new one?

# Implementation partnerships

Smart collaboration with integrators ensure that you have a verifiable blueprint for success and independent validation

There are several options. The important thing is to have a plan. Must you manually transition system information into the new platform? That would be an awful nightmare, but there are tools to help support that, and with that information in mind, you can build a realistic sunset plan for your older software. Regardless, your goal, and we've discussed ad nauseam, is a completely connected system of tools. No redundancies, no crossed wires, no cut wires. Who can help with that? Well...

## Consider Implementation Partnerships

While they're somewhat invisible to the daily discourse on Future of Field Service, we do talk to partners on here from time to time, and write about them as well. Typically, your software provider is going to recommend an implementation partnership to eliminate some of the development burdens and ensure ease of transition into new software environments. Sometimes, your software vendor themselves will have a consulting wing for that express purpose. While this can help with much of the technical, and some of the organizational strain that goes along with service software development, it can't erase the last mile, which will inevitably come down to your unique business, and how internal teams are advocating for and engaging with the software to ensure its effective use and position within your organization.

## Look Ahead

So you've mapped the necessary processes, and implementation is done. That's it, right? Of course not. Technology, like fashion, is never finished. Today, right now, new advancements in areas of business modeling, device connectivity, and emerging technologies are setting up opportunities for much greater efficiencies for service providers, and far more advanced solutions for customers of service. More than anything, it's important to not be afraid to take additional steps on your technology journey, especially after you've just implemented a powerful new system. Know that you've just scratched the surface of your ROI potential, and that a solid Service Management platform is the foundation onto which you can build a successful digital-first organization.

## Upgrades and Replacements

A much more common scenario than that above are businesses that have chosen to replace an existing system with a new one. Once the decision to employ new software has been made, there are naturally a multitude of stakes, elements, and decisions that need to be made. Many of these, in one fashion or another, can be seen in previous entries in this series. Before the choice is made, though, we need to start by evaluating the unique set of challenges that businesses find themselves in when switching from one service provider to another.

How do you unplug one system and prepare your business to onboard another? Let's look at it through three different lenses:

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## Saying goodbye to your old service provider

Breaking up is hard to do, but for companies looking to get ahead, there's no hard feelings, when it comes to service. Here are some of the reasons why businesses decide to switch service companies:

- Your current software is too basic for your needs, or can no longer manage the scope of your business.

- Your software provider is forcing n upgrade to an inferior product based on an external acquisition.
- You have developed a technology stack that no longer implements and communicates properly with your service platform.

# In short

## Find a service platform that conforms to how you deliver service

### The Software

The main consideration here is integration. Do all of your legacy systems that are not being replaced work with the current software? If not, what is the best means to proceed? How easily or directly can historical documentation, parts and employee lists, and contracts, be ported from one system to another? The best way to absolve your firm of the crushing weight of these tasks is to employ an integration partner alongside your software partner. You'll be working with seasoned professionals who have gone through this process before many times, and can help guide you through the crossover. With the appropriate guidance in place, getting this part right is not guaranteed to be frictionless, but will at least offer a more robust system of validation.

### The Employees

Employee buy-in is the key to any service strategy. We've all been in a position where a dramatic change in the way we do business disrupts life, and sometimes adaptation to the new status quo is not something that comes naturally. This is why it's important to engage player-coaches early in the process. You'll need advocates to make sure that technicians are actually pressing the service buttons—especially if their new service software will automate more than it did previously (which it should). By using in-role advocates and making implementation a big deal for the company, you'll position yourself to hit the ROI that you expect to receive from a new service platform.

### The Customers

Does your customer care about your shiny new service platform? The answer is a resounding and unequivocal no—BUT—your customer will care if your service platform now offers new ways to go to market. If you're now tracking more elements of your business in your service solution, then you can offer solutions around that trackability. This is the core of outcomes-based service—build your contracts around uptime and output, not break-fix. Offering customer value like that means a lot to the average customer, who prefers guarantees to warranties. Taking this seriously can extend the ROI of a new service platform out of the obvious, and help you build business and customer loyalty. A true win-win.

## About IFS

IFS develops and delivers enterprise software for companies around the world who manufacture and distribute goods, build and maintain assets, and manage service-focused operations. Within our single platform, our industry specific products are innately connected to a single data model and use embedded digital innovation so that our customers can be their best when it really matters to their customers—at the Moment of Service.

The industry expertise of our people and of our growing ecosystem, together with a commitment to deliver value at every single step, has made IFS a recognized leader and the most recommended supplier in our sector. Our team of 4,000 employees every day live our values of agility, trustworthiness and collaboration in how we support our 10,000+ customers. Learn more about how our enterprise software solutions can help your business today at [ifs.com](https://www.ifs.com).