TRANSFORM THE CUSTOMER EXPERIENCE WITH INTELLIGENT FIELD SERVICE MANAGEMENT FOR MANUFACTURING
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Contents

Introduction .................................................... 3
1 | What Is Intelligent Field Service Management? ................. 4
2 | Field Service Presents Unique Challenges to Connectivity .... 6
3 | Best Practices for Delivering the Best Customer Experience ... 8
4 | Best Practices for an Efficient Call Center or Dispatcher ........ 10
5 | Best Practices for Equipping Your Field Agents ................ 12
Conclusion .................................................... 14
Introduction

In the era of the connected customer, delivering a superior, end-to-end customer experience has never been more important, especially for manufacturers. In fact, according to the “Customers 2020” report, customer experience has overtaken price and product as the key brand differentiator.

In addition, manufacturing executives understand that their overall business models are changing, as 74% strongly or somewhat agree that within the next 10 years products will become loss leaders, while services (like data and maintenance) will be the primary revenue drivers of their companies.*

To put it simply: Future business success depends on providing superior customer service. Customers expect personalized, connected service everywhere, and service expectations are no longer being met with just a call center. For manufacturers, online contact and engagement centers are also no longer enough—onsite support must be connected as well. How could your manufacturing business revolutionize the way it manages field service from end to end? What would it look like if you were able to deliver personalized, smarter, faster field service that could transform the customer experience? Moreover, what would it look like if your team of skilled field technicians could deliver this exceptional customer experience faster and more accurately than ever before, every time?

*“Revolutionizing Customer Service in Manufacturing” report
Chapter 1  |  What Is Intelligent Field Service Management?

To boil it down as simply as possible, excelling at field service means having an intimate understanding of the following: Who does what, how, when, where, and for whom?

Intelligent field service helps manufacturers manage work that needs to be performed on location rather than over the phone or through online communication. Field service is a collaboration between numerous parties, including:

- **The customer** who makes the service request or the product that requires support
- **The agent** who receives the service request and creates a work order
- **The dispatcher** who ensures that the right work is assigned to the right mobile employee based on schedules, expertise, and location
- **The service technician** who receives the work order and makes the onsite visit to complete the job
While field service depends on many different factors, at the end of the day, you’re measured on the quality of the individual service you provide to each and every customer.

“92% of executives believe they need to adapt their service models in order to keep up with customers’ needs.”

*2016 Salesforce Connected Service Study*

This has led the drive for intelligent, personalized customer service to expand faster than ever, whether delivered over the phone or onsite. For example, according to CSG International, 89% of customers want an “Uber-like” technician tracking service. It can feel impossible to keep up with these expansive and constantly changing expectations. But with the right technology and the right customer insights, your business can keep its finger on the pulse of what customers expect from their interactions with your company.
Field Service Presents Unique Challenges to Connectivity

Manufacturers can provide a customer experience that turns customers into loyalists—but to deliver, they need a 360-degree view of each customer. Without the right insights, your company doesn’t have the information it needs to stay on the cutting edge of what customers are looking for. Even on an individual customer basis, you need a complete view of each customer in order to provide the best service possible with fast, first-time case resolution.

“89% of manufacturing executives agree that focusing on real-time information collection and storage is key to keeping customers.”

2016 Connected Manufacturing Service Report
Managing field service presents unique challenges that require a complete customer view to resolve. Siloed teams out in the field, poor resource allocation, lack of mobile support, and lack of integration with CRM all contribute to the difficulty level of managing field service operations.

“77% of companies are still using an on-premises field service solution.”

Field Service News

Without the right customer insights, the results are potentially disastrous—a disconnected customer service experience can result in slower case resolution, customers needing to call back because a first service call didn’t result in the right answer, and customer churn. According to the Aberdeen Group, the number one reason for return visits from field technicians is a lack of customer information. These repeat visits can be incredibly costly for your business—and provide a frustrating experience for customers.

With agents, dispatchers, and mobile employees all connected on one platform, operations can be streamlined across the entire service chain, and the customer experience can be more connected than ever. By eliminating friction and frustration for both employees and customers from moment to moment, you’re well on your way to developing a more personalized, predictive customer experience.
Best Practices for Delivering the Best Customer Experience

From the customer perspective, field service has a bad reputation—and it’s no secret why. Field service horror stories are ubiquitous—like the technician who hasn’t been in contact with the customer, arrives late, and doesn’t have the parts or tools needed to solve the problem. Your customers’ expectations dramatically exceed this disconnected experience.

“83% of executives agree that their service department plays a strategic role in the overall business.”

2016 Salesforce Connected Service Study
Delivering smarter, more personalized, and faster field service to the empowered customer presents unique challenges, but the benefit to the customer (and to manufacturers) is worth it. Customers want the right person to arrive, with the right tools and parts, on time, every time. The customer wants to be able to book a service appointment from any device—they don’t want to have to place a call to your customer service agents in order to request an appointment, or to cancel or reschedule that appointment. They want more visibility into what they can expect from their visit with a field technician, and they want to be confident that the job will get done on the first visit.

Customers are becoming more and more accustomed to up-to-the-minute information and visibility into the companies they interact with—from tracking an Amazon package delivery to an Uber waiting outside their door waiting to pick them up—all with the push of a button. Now your customers expect to know where the technician is, what time they will arrive, and how long it will take to complete the job.

While your customers understand that the field technician may not be able to understand the intricacies of every individual issue right away, they do expect that the technician has the right tools and technology at their fingertips to find the right answer sourced from experts. And in instances where field service is needed on a regular basis for maintenance or for the lifecycle of a product, customers want your business to do the heavy lifting by automating service reminders, offering up appointment slots, and contacting customers via their preferred communication channel. When your company can deliver the type of customer experience that taps into the preferences of the modern customer, you’ll boost your customer satisfaction and customer retention numbers and, in turn, boost your profits.
Best Practices for an Efficient Call Center or Dispatcher

Your service agents are on the front lines and are most closely associated with providing an effortless experience for your customers, but crafting such a superior customer experience is no easy feat. Agents handle a vast number of cases from a variety of different channels, so they need processes that will help them manage the workload as effectively and efficiently as possible.

“Executives report that 45% of their service agents are frustrated with the slow speed of their current tools, and 38% feel they can’t access the information they need.”

2016 Salesforce Connected Manufacturing Service Report
To deliver connected field service, agents need a combination of customer insights and easy work order management. When the customer reaches out and requests an onsite service appointment, the service agent needs a full view of that individual customer, their specific service agreement and warranty, as well as any other specific needs, so they can create and schedule the correct work order.

But the insights need to go deeper than just the individual customer level. With multitiered asset hierarchy, agents must be able to track information about your customers’ products, gain insights into which customers also own a competitor’s products, and leverage asset hierarchy to track products made up of several different parts, all in one view. This 360-degree view allows agents to spot cross-sell and upsell opportunities, as well as predict other potential service needs based on multiple parts that make up one product.

In the multichannel, fast-moving service world, service agents need work order management to be easier than ever, with the ability to quickly create detailed work orders on any case from the service console. These work orders also need to be mobile, connected, and fully integrated with additional areas of the business and CRM, including accounts, contacts, assets, cases, entitlements, and service contracts.

The next step in the field service process is scheduling via a dispatcher. Dispatchers need to ensure that the right job is paired with the right mobile employee every single time and that the job is completed in a timely, efficient manner. To do so, they need to intelligently schedule and dispatch work orders, as well as track and monitor the service delivery in real time. Additionally, dispatchers need to be able to communicate with field technicians and make changes in real time when alerts arise for issues that require immediate attention. When dispatchers have the right tools and information at their fingertips, they can make sure the job is as seamless as possible for both the field technician and the customer.
Your field technicians are often your employees most closely connected to the experiences of your customers, and their interactions with customers are truly make-or-break moments. Field technicians are your most mobile employees, but current field service technology falls short in fulfilling their mobile needs.

“52% of companies are using manual methods to handle field service.”

2016 Salesforce Connected Service Study Field Service
Lightning Field Service
Field technicians need access to work orders and other key information on the go, including real-time job updates, schedules, inventory, and customer information so that they’re always working off of the most current information. To increase first-time fix-rate numbers, field technicians must have everything they need to get the job done quickly and effectively, right from their mobile device.

Your field technicians may not always have the answer to every single problem, but with the power of mobility (and even offline connectivity to records and information), these technicians should be connected to the right reports, resources, and experts from anywhere at any time. This eliminates the need to schedule a follow-up appointment with the customer due to lack of information in the field.

Field Service Lightning is the latest field service solution from Salesforce. With it, you can ensure that your business can meet rising customer expectations with rich insights. Although field service presents its own unique set of challenges in meeting and exceeding customer expectations, with Field Service Lightning your company is equipped to deliver a connected experience in the field and close the customer experience gap.
Conclusion

Intelligent Field Service Management is here.

Salesforce’s customer service software gives you faster, smarter customer support. Give your customers the answers they need, whenever they need them. Meet their new needs by providing personalized service that goes above and beyond what your competitors can deliver. Meet customers where they live with multichannel support, fix problems before they happen, and delight customers through the entire experience.