THE COMMUNICATION PROVIDER'S GUIDE TO

Amazing Field Service

From office to field

salesforce

INTRODUCTION

In the era of the connected customer, delivering an excellent, end-to-end customer experience has never been more important. Evolving customer expectations have encouraged most industries, from banks and healthcare providers to retail companies, to put the customer at the center of their business. Companies like Amazon, Apple, and Hulu are raising the bar even further by creating a real, ongoing personal connection with customers that inspires both loyalty and spending. The future of the communications industry, too, relies on providing a connected customer experience from the obvious things like high-quality networks and competitive products to the field service that defines a customer's ongoing relationship with a company.

Consumers' service expectations have drastically changed from traditional call center support. For communications service providers, the field service channel has moved beyond just installing devices; now, technicians must become fully-equipped and connected support agents as well, with the ability to answer questions about purchased products and services, and change their service plan if needed.

The reality is that customers expect fully connected service – including field service – from their telecommunication providers, or they'll switch to other providers. But many of today's communications providers are not equipped to deliver on these expectations and are falling behind both the service and experience curve. Field service suppliers still rely on traditional phones when customers prefer communicating online or via social media. Customers continue to be frustrated by having to take off work to wait for a technician and by the general lag between making an appointment and hearing a knock on the door. They want real-time communication, and they're not getting it. As a result, the customer experience gap is widening – something the communications industry cannot afford to let happen. Millennials (61%) and Gen Xers (41%) are already subscribing to online and mobile video streaming services from other companies because their communication provider doesn't offer it.

How can your business improve on this and not lose ground to newer, more nimble competitors? What would it take to deliver personalized, smarter, faster customer service? How can a communications service provider (CSP) turn around a high-touch customer-facing channel, such as field service, into a channel that defines its brand and becomes its most critical channel? Read on to discover how to transform your field service channel and go beyond your customer's expectations.

CHAPTER 1

What the Communications Customer Wants

Customers expect simplicity. They want you, as the service provider, to make it easy for them to do business with you. For customers who've had bad experiences in the past, simple and seamless experiences with their service providers are a welcome change. Companies delivering the best experiences are setting these expectations.

Personalization

Think of how Amazon and Netflix leverage their data to give customers proactive recommendations on what to buy or watch. Customers expect you as a communication provider to leverage the data you already have to create a personalized experience just for them. When a customer calls the contact center, they want to be greeted by name. They don't want to have to authenticate their identity after already doing it in the interactive voice response (IVR) system. Similarly, according to the 2016 Connected Subscribers Report, more than 20 percent of customers want field technicians to know their information, and help them change their plan or service if needed.

Control

Customers have become accustomed to being in control of their buying experience more than ever before. This expectation has also crossed over to the way they interact with CSPs. They want you to give them control over their own accounts. Customers want the ability to schedule their own in-home appointments with technicians with ease. They want to interact with you in a way that works best for them – across all devices and channels – in a sequence that makes sense to them. For example, self-service gives customers control and empowers them to drive interactions. They might research information online, and then decide to take their questions to Twitter, or ask the technician standing in their home. As a company, you have to be prepared for both, allowing the customer to dictate how they interact with you rather than you imposing restrictions on them.

> "Millennials (69%) and Gen Xers (62%) find it much more important than Baby Boomers (41%) to have a seamless experience across channels."

2016 Connected Subscribers Report

Seamless assistance

Regardless of the industry, nearly anyone who has phoned customer service has horror stories about getting passed from person to person, repeating themselves to the point of frustration, and waiting on hold for dozens of minutes to hours. Customers won't stand for it any longer; they want you to help them as a team. Give the customer a consistent point of contact, someone who knows the full context of their interactions. Real-time app trackers that notify customers of technician arrival times helps keep everyone in the loop. When a service technician goes to a customer's home, they should know exactly why they're there, and have the right tools and equipment to do the job right the first time. Seamless assistance is a huge step towards better experiences.

Proactive Service

Similar to personalized experiences, customers want you to adapt to their situation. They want you to anticipate issues and proactively resolve them. They expect their communication providers to be able to pivot from interaction to interaction, always by providing valuable information or save them time or money. Customers expect visiting technicians to learn and adapt to multiple in-home situations. The technician must be able to switch roles while on-site, going from repairing products to remote diagnostics to teaching customers how to fix problems themselves. While legacy systems can make it difficult for agents to connect these interactions and transition smoothly, failure to adapt leaves customers frustrated and with negative experiences.

CUSTOMER EXPERIENCE: THE NEW CURRENCY IN COMMUNICATIONS

Customers are shifting their business to companies that deliver a customer experience that is simpler and personalized for them. Here are 4 takeaways:

- Customer experience differentiates you as a service provider

- Customers expect a simpler experience

- Customers want consistent experiences across multiple channels

- Focusing on customer experience drives real business value

CHAPTER 2

Field Service Challenges to Overcome

Managing field service brings its own unique challenges to every company that offers it. Traditionally, many CSPs use multiple tools and solutions – which are disconnected from one another – to address these challenges. As a result leaders, agents, and field service technicians lack visibility across all customer touch points, which is crucial in developing the kind of panoramic customer view that modern businesses need.

There are a few things standing in the way of a 360-degree view:

Siloed teams

Many service teams use multiple tools to get the job done: customer service software, dispatch systems, and the apps technicians use in the field. Often, these services are not fully connected, creating silos and slower collaboration, and preventing optimal team performance.

Poor technician management

Communication service providers often have full-time employees as service technicians as well as a larger base of third-party technicians working as contractors. This leads to challenges with scheduling, routing, and ensuring that all techs have the right information and equipment.

Lack of integration with CRM

On a larger scale, these tools are often not connected to a communication company's CRM and with other BSS/OSS systems like inventory or network management systems. This lack of seamless integration across the company leaves service organizations without full visibility into a customer's profile, product history, and the context of their problems.

Not a profit center

Field service is often seen as a cost center rather than a profit center due to poor operational efficiency. Consequently, this channel tends to receive less training, slower upgrades to tools, and less overall investment despite being so closely connected with customers.

66 77% of companies are still using an on-premises field service solution. 99

Field Service News

CHAPTER 3

Get Connected From Agent to Field

Each department within your company has a wealth of data on its customers. But in order for the data to be useful in customer support, it must be accessible to your agents, dispatchers, and mobile employees. When your entire organization is connected on one platform, information is shared in real-time, and you can build a holistic view of every customer, providing every employee with the means to create a positive customer experience. Operations across your service chain become streamlined: no data siloes, no information falling through the cracks.
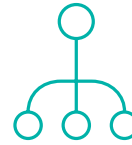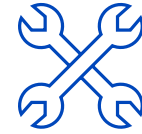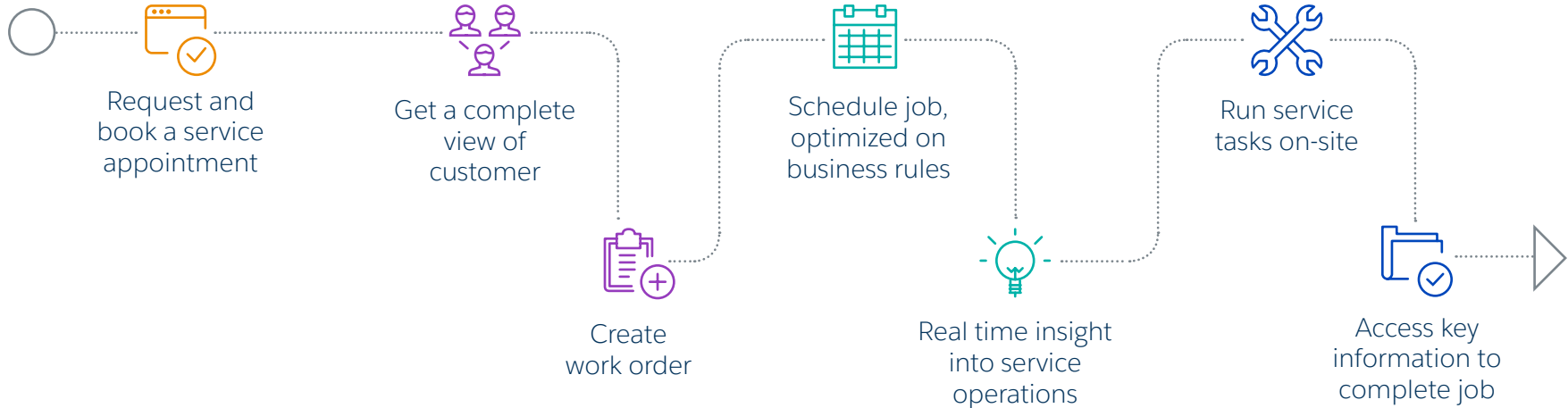
Connected Customer Journey

CUSTOMER

SERVICE AGENT

DISPATCHER

FIELD TECHNICIAN

Request and book a service appointment

Get a complete view of customer

Create work order

Schedule job, optimized on business rules

Real time insight into service operations

Run service tasks on-site

Access key information to complete job

CHAPTER 4

Enable Your Field Service Technicians for Success

Your field agents are the face of your brand, the employees most closely connected to powering your customer experience. Their interactions with customers are truly make-or-break moments. But current field service technology often falls short in fulfilling agents' mobile needs. Empower your most mobile employees to be their best with fast, first-time case resolution from agent to field.

Onboard and train your technicians – fast

Between your full-time technicians, contractors, and the demand for quality in-home customer experiences, you need to be able to onboard and get your technicians up to speed quickly. Why? When you lower onboarding and training time, your techs are back in the field faster, reducing operation costs. Use collaboration tools that enable file sharing and encourage internal discussions. Wikis and blogs help new employees jump into the company culture, and knowledge bases integrated into service tools empowers tech to search for answers to their questions. When technicians have all the tools and knowledge at hand, they can focus completely on making customers happy.

Improve field service satisfaction

Companies depend on a 360-degree view of each customer in order to deliver the modernized experience that consumers expect. But siloed teams out in the field, in addition to suffering from poor resource allocation and lack of mobile support, can make this connected experience difficult to deliver. Give your technicians access to your business support systems (BSS) as well as offline capabilities so they can access useful information. Field service technicians that can quickly and efficiently complete the work order, with minimal disruption, leave a positive impression on customers that builds loyalty.

> Executives report that their service agents' top frustration with using their current tools in the field is that current tools are not fast enough (45%) and they can't access all of the information they need (38%).

2016 Salesforce Connected Service Study

Connected Technician Journey

ACTION ITEMS

COMPLETE WORK ORDER   **PROVIDE PERSONALIZED SERVICE**   **POST SERVICE TASKS**

Get status on upcoming job

Inventory management

Prepare for customer visit

Complete work order

Upsell

eSignature

Personalized experience

Get customer feedback

Build customer insights

Rate & review community activity

Real time dashboard (Goal tracking)

Maximize productivity

When your field service team is connected with agents and dispatchers on a single platform, it boosts team collaboration and productivity. Work orders can become a comprehensive source of information for contacts and subject matter experts, entitlements, service contracts, product history, and other complex asset information to support field techs and anyone else working on the job. And if your service tools have offline capabilities, field service technicians that encounter weak or non-existent mobile connectivity will appreciate being able to have access to knowledge while on the go.

Deliver what customers expect

In order to keep up with newer, more nimble competitors, traditional communication service providers must transform customer care, using collaborative systems to help field service organizations know each individual customer better. By leveraging a platform that integrates cloud, service, social, and mobile tools, you connect the whole company and empower the field agent to help the customer, on-site. That transforms the field service operation into a profit center by increasing efficiency, reducing operational costs and appointment windows, and gaining cross-sell and upsell revenue. Best of all, with Salesforce, you connect without upsetting the back office. Build a cohesive field service organization from agent to field, while empowering your field service technicians to deliver positive customer experiences, every time.

Faster, smarter service from the phone to the field on one platform

Field Service Lightning gives you faster, smarter on-site customer support. Give your customers the answers they want, the support they need, and technicians who can get the job done right the first time. With Field Service Lightning your company is equipped to deliver the same connected experience in the field, as they would receive on the phone or chatting with an agent online. Turn around your siloed, disconnected field service operations and get ready to exceed customer expectations.

Transform your field service operations into a profit center.

- Increase efficiency in your service organization
- Reduce operational costs
- Gain cross-sell/upsell revenue.

LEARN MORE
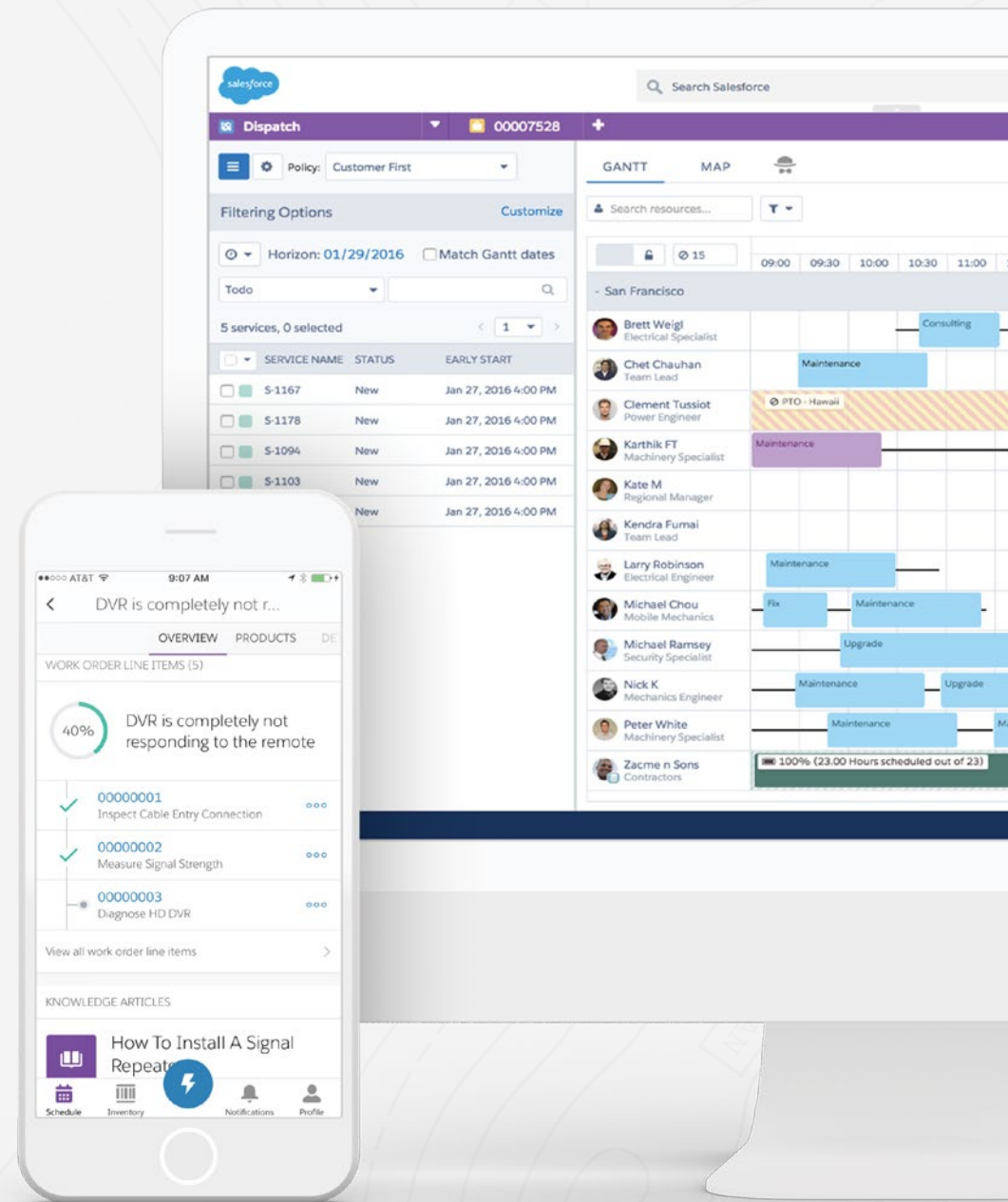
Communicate on a person-to-person level

The Customer Success Platform provides multiple options to integrate with existing BSS/OSS systems without replacing them. CSPs can take advantage of Communications Industry Framework, which is built in accordance with TM Forum Frameworx, that include assets such as Communications Data Model specifications, API and process documentation (and much more) to further accelerate their transformation.

Transform your field service operations into a profit center.
- Gain a 360-degree view of every customer company-wide
- Deliver a cohesive, personalized journey at every step
- No disruption to existing BSS/OSS

LEARN MORE

Resources you may also like:

GET THE TOOLKIT ›

VIEW DEMO ›
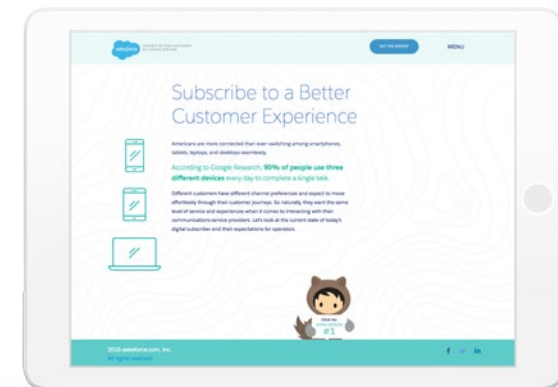
EXPLORE THE INFOGRAPHIC ›

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CONNECT TO YOUR CUSTOMERS
IN A WHOLE NEW WAY