

A man with a grey beard, wearing a blue hard hat and a yellow safety vest over a grey jacket, is kneeling on a roof covered in solar panels. He is looking down at a tablet computer he is holding in his hands. The background shows a clear sky and distant hills.

Best Practices for  
Transforming the Customer  
Experience with

# CONNECTED FIELD SERVICE

salesforce

service cloud

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## INTRODUCTION

In the era of the connected customer, delivering a superior, end-to-end customer experience has never been more important. In fact, according to the Customers 2020 report, customer experience has overtaken price and product as the key brand differentiator. To put it simply – the future of business success relies on providing superior customer service.

Customers are expecting personalised, connected service everywhere and service expectations have long evolved from the call centre. In today's connected world, online contact and engagement centres are also no longer enough – on-site support must be connected as well. Additionally, it's now easier than ever for customers to switch between competitors if they're dissatisfied with their service experience with one company.

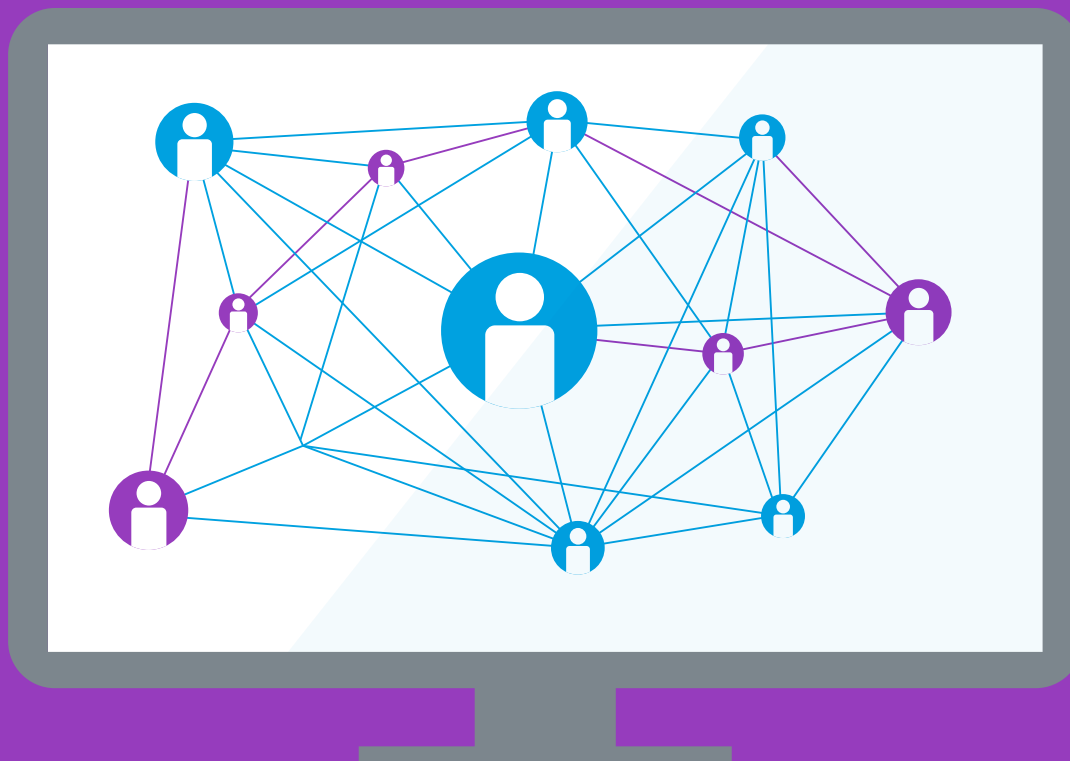
With changing customer expectations, today's businesses are not equipped to deliver what customers expect, particularly when it comes to field service management. As a result, the customer experience gap is widening. As technology transforms how companies are interacting with their customers, field service in particular faces exclusive challenges in evolving its model to meet the needs and expectations of the modern customer. How could your business revolutionise the way it manages field service from end to end? What would it look like if companies were able to deliver personalised, smarter, faster service that transforms the customer experience? Moreover, what would it look like if this exceptional customer experience could be delivered – every time – by service reps in the field?

# 1

## What is 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?



Field service management helps organisations manage work tasks of any kind that need to be performed on location. Field service is a collaboration between numerous parties, including:

- The customer who makes the service request;
- The agent who receives the service request and creates a work order;
- The dispatcher who oversees that the right work is assigned to the right service technician based on schedules, technician expertise, and location; and
- The field service technician who receives the work order and makes the on-site visit to complete and execute the work order.

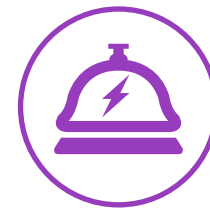
While field service depends on many different factors, at the end of the day, you're measured on the quality of the individual service you provide to each and every customer.

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

**-2016 Salesforce Connected Service Study**

Companies worldwide are changing the game when it comes to providing next-generation services and customers have grown accustomed to these connected services. This has led the expectations for customer service to expand faster than ever, whether delivered over the phone or on-site.

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 astronomical 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 are expecting from their interactions with your company.



# 2

## Field Service Presents Unique Challenges to Connectivity

Companies 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.



Managing field service in particular 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.

Many companies are using multiple tools and solutions to try to address the challenges of field service management. According to Field Service News, 77% of companies are still using an on-premises field service solution. As a result, leaders lack visibility across all customer touch points and insights, which is crucial in developing the panoramic customer view that modern businesses need.



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, which comes at a cost of \$200-\$300 per visit.

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.

Every service experience is made up of a series of moments, and each moment is an opportunity to exceed expectations and build a closer, more connected experience with the customer. By eliminating friction and frustration for both service techs and customers from moment to moment, you're well on your way to developing a more personalised, predictive customer experience.

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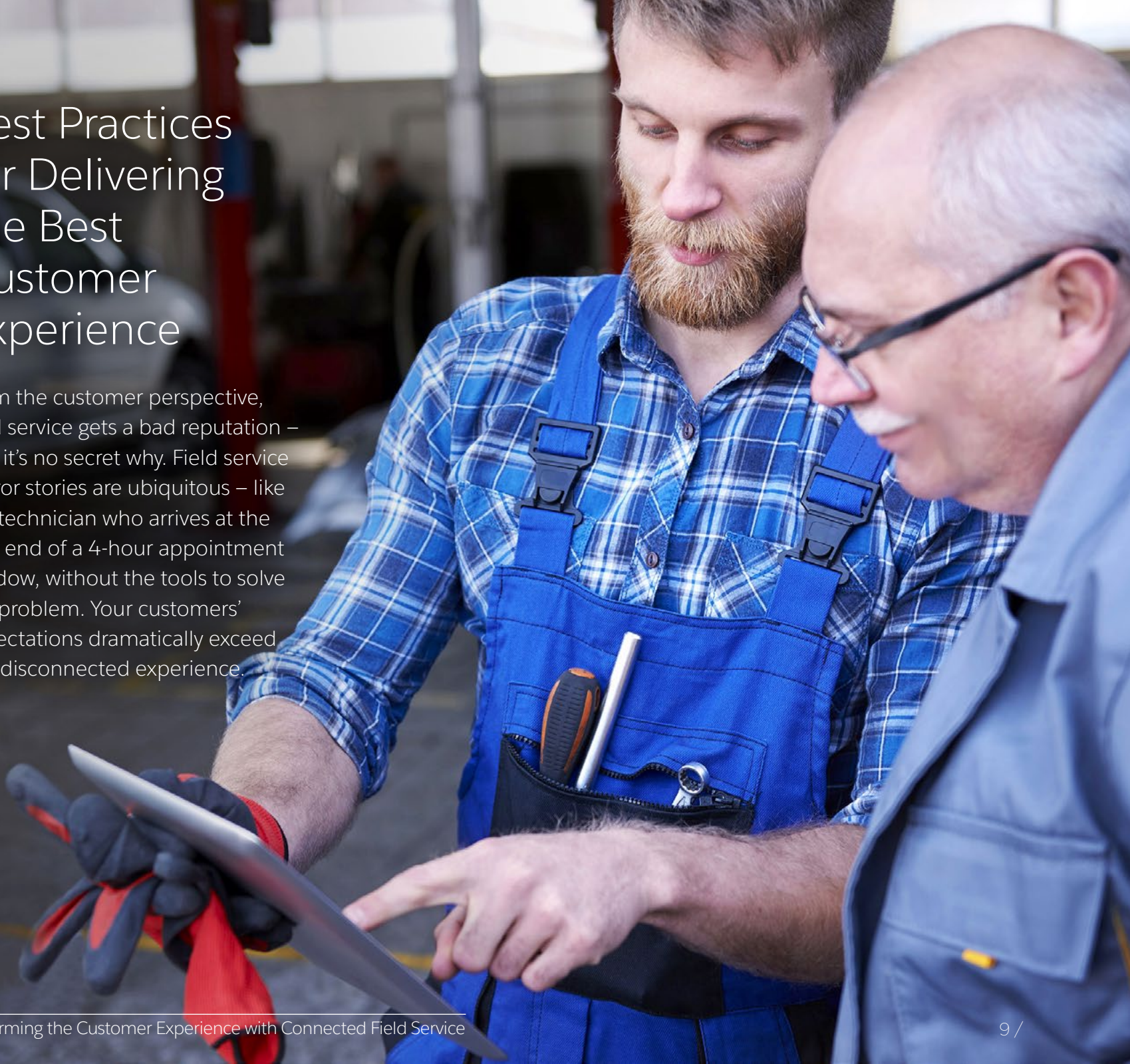
**-Field Service News**



# 3

## Best Practices for Delivering the Best Customer Experience

From the customer perspective, field service gets a bad reputation – and it’s no secret why. Field service horror stories are ubiquitous – like the technician who arrives at the very end of a 4-hour appointment window, without the tools to solve the problem. Your customers’ expectations dramatically exceed this disconnected experience.



Delivering smarter, more personalised, and faster field service to the empowered customer presents unique challenges, but the benefit to the customer (and the business) is worth it.

Customers want the right service technician, 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 agent, with the confidence that the job will get done on the first visit. Consumers are becoming more and more accustomed to up-to-the-minute information about events – from tracking a package to that Uber-like experience. Your customers want to know where the technician is, what time the technician will arrive, and how long it will take to complete the job.

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

**- 2016 Salesforce Connected Service Study**



Your customers understand that the field agent may not be able to understand the intricacies of each individual issue right away, but the customers do expect that the agent has the right tools and technology at his fingertips to find the right answer sourced from experts.

And in instances where field service is needed on a regulated basis for maintenance or for the life cycle of a product, customers want your business to do the heavy lifting by automating service reminders, offering up appointment slots, and contacting the customer via the channel they prefer.

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.



# 4

## Best Practices for an Efficient Call Centre and Dispatcher

Your service agents are on the front lines and are most closely associated with providing an effortless experience for your customer, 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.



To deliver connected field service, agents need a combination of customer insights and easy work order management. When the customer reaches out and requests a field service appointment, the service agent needs a full view of that individual customer and their needs, so they can create and schedule the right work order.

But the insights need to go deeper than just the individual customer level. With multi-tiered 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.

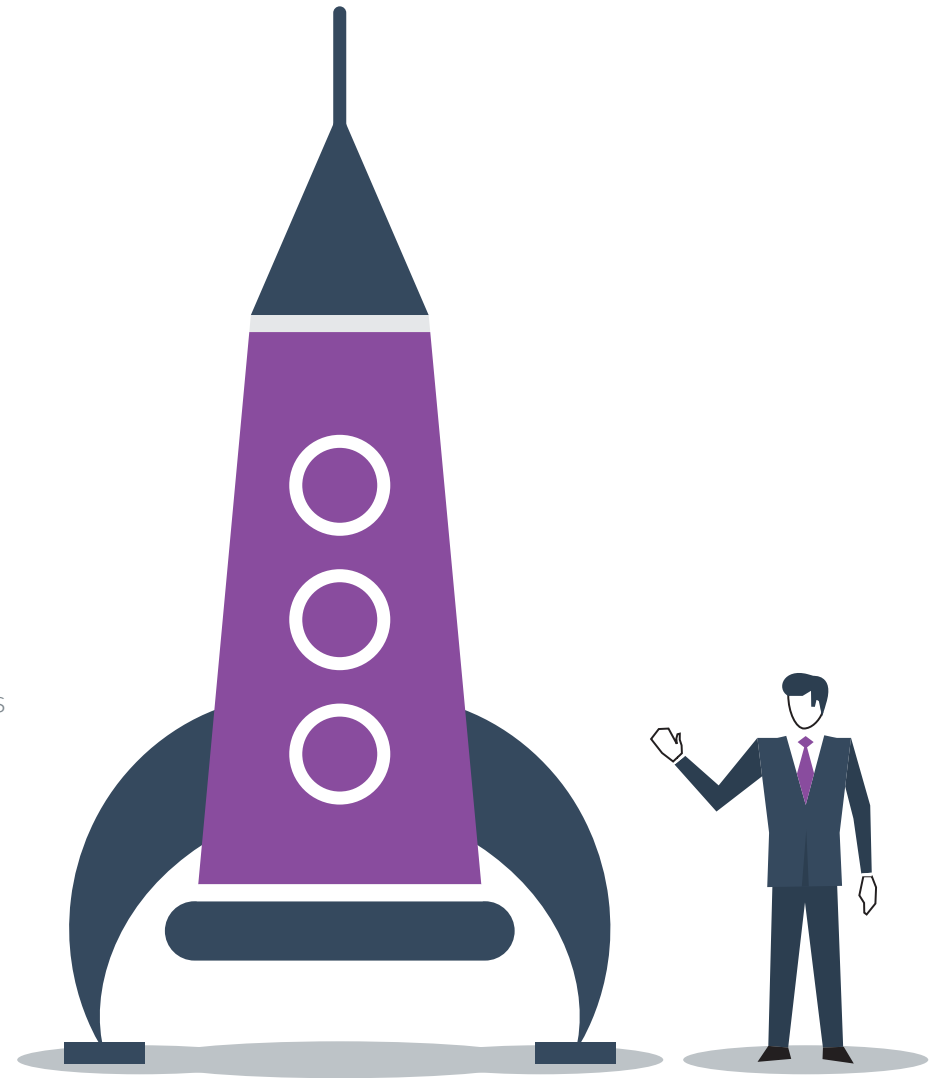
*Executives report that their service agents' top frustration with using their current tools in the field is that current tools are not fast enough (45%) and they can't access all of the information they need (38%).*

**-2016 Salesforce Connected Service Report]**



In the multi-channel, 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. In order 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 agent and the customer.



# 5

## Best Practices for Equipping Your Field Agents

Your field agents are often your employees most closely connected to powering your customer experience, and their interactions with customers are truly make-or-break moments. Field agents are your most mobile employees, but current field service technology falls short in fulfilling their mobile needs.



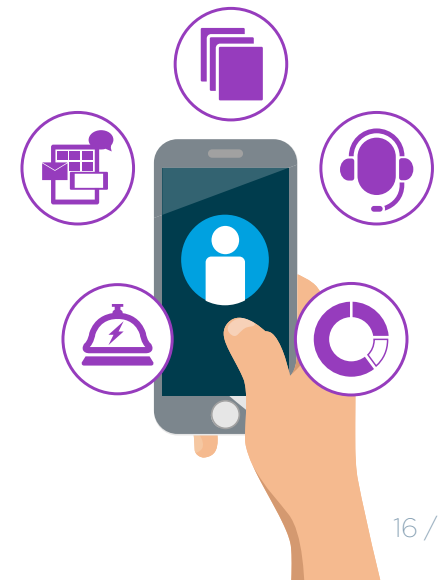
Field technicians need access to work orders and other key information on the go, including real-time job updates, schedules, inventory, and customer information so that they're always working off of the most current information. To increase first-time fix rate numbers, field agents must have everything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

Field Service Lightning is the latest tool from Service Cloud to 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 the same connected experience in the field and close the customer experience gap.

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

-2016 Salesforce Connected Service Study







# The future of customer service, now.

Service Cloud 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 personalised service that goes above and beyond what your competitors can deliver. Meet customers where they live with multichannel support and fix problems before they happen and delight customers in the process.

[Learn more](#)

- 48% Faster case resolution time
- 47% Increase in agent productivity
- 45% Decrease in case resolution time

Source: Salesforce Customer Relationship Survey conducted May 2015, by an independent third-party, Confront Inc., on 4,600+ customers randomly selected. Response sizes per question vary.

Note: Performance metrics are intended as a guideline based upon historical results from a sample set of customers. Results are dependent upon many different factors that are customer-specific. Therefore, actual results will vary.



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