

MOBILIZE

Microsoft Dynamics™ GP

Transforming Field Service Operations with Mobile Technologies

White Paper

Solutions that Help Transform Field Service Operations into Strategic Profit
Centers

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Introduction

Across a wide variety of industries, businesses provide customers with field service as a primary business or as part of long-term customer service and support. For example, field service operators may include manufacturers who offer after-market service, equipment rental organizations, and in-home and commercial service providers. Depending on the size and type of organization, service operations may involve a small team of employees in a local area or thousands of technicians deployed internationally. Whether field service represents the primary business or a service offering needed to remain competitive in their industry, organizations with a field service component now look to service operations as a way to drive revenue, rather than as a cost center. To achieve this goal, organizations depend on efficient coordination among distant field employees, dispatch and office staff, and the organization's collective customer and business knowledge.

Forward-thinking companies that face increasing competitive pressures and product commoditization are turning to mobile technologies to bolster operational efficiencies and improve customer satisfaction—in turn driving top-line profitability. By combining well-defined business processes and field service automation solutions that bridge the gap between the back office and the field, post-sales service is evolving from a tactical cost center to a strategic profit center

This white paper discusses the challenges faced by organizations with a field service component and the benefits of adding mobile technologies to existing field service solutions. Along with an overview of best practices for implementing a mobile technology solution, the paper describes how Field Service Anywhere for Microsoft Dynamics™ GP can empower field service teams to reduce response times and costs, increase first-time fix ratios, boost revenues, generate greater customer satisfaction, and help transform a potential cost center into a key profit center.

Mobile Technology Needs for Field Services Operations

For many businesses, managing field operations accurately and effectively is a daunting challenge. Manual processes, inconsistent work practices, and inadequate or untimely visibility into field activities hinder efficiency and impede both customer service and profits. Manual or offline reporting of time and materials use often requires redundant data entry and increases the likelihood of errors and delays in planning, scheduling, and billing. Even with the most experienced dispatchers, work-assignment decisions rarely take full advantage of timely data on resource availability, qualifications, service history, work priority, and other mission-critical information.

Successful field service delivery depends on the careful coordination of several stakeholders across the organization. Customer service representatives – whose duties include call logging, SLA verification and issue diagnostics – need a direct link to dispatchers who monitor job requirements review, technician planning/scheduling, and customer preference validation. Likewise, dispatchers must have a seamless connection with field service technicians – who deal with issue resolution, administering customer transaction, and up-/cross-selling — and technicians, who interface with the parts depot workers managing inventory, part returns, and warranties.

Despite these challenges, technology investments in field service operations are often secondary to other business management expenditures. Although many businesses enjoy the efficiencies of enterprise resource planning (ERP) systems and field service automation, those systems rarely extend into the hands of field technicians, whose productivity can be significantly enhanced with integration and electronic information.

In an increasingly competitive marketplace, companies that provide repair, maintenance, and other field-based services can no longer afford to treat post-sales service and supply chain management as an afterthought. Still, many firms servicing equipment, facilities, and other high-tech and industrial assets rely on outdated, inefficient processes for managing call logging and tracking, work scheduling, contract and warranty management, and service parts management.

Efficient, profitable field service operations depend on the ability to automate and integrate the flow of critical information across the back office and the field. By equipping field technicians with robust mobile functionality and connectivity – supported by well-defined business processes – organizations can dramatically reduce delays in field service delivery and impact overall profitability. Companies that can outfit their technicians with devices such as Personal Digital Assistants (PDAs) or multi-function smart phones can bridge the gap between the field and the back office, helping reduce costly service inefficiencies and ensure that people across the organization work with real-time, accurate information. By incorporating mobile solutions into their business systems, businesses can realize marked gains in revenues, profit margins, cash flow, and overall customer satisfaction.

Tangible ROI for Mobile Solutions in the Field Service Space

Optimized field service delivery involves the coordination and synchronization of four key components – people, parts, process, and data – which is an impossible feat without some measure of technology support. To achieve the greatest efficiencies and to capture all the potential value within a field service operation, businesses need to establish links across all four components. Handheld devices enable field technicians to receive data on everything from service bulletins to customer preferences and to transmit data on parts, warranties, and invoices. They have the potential to dramatically build and strengthen the critical linkages among the four field service components.

To tackle critical field service objectives, leading organizations are taking advantage of emerging mobile solutions and, as a result, are reaching new heights in overall corporate performance. According to a recent research report by the Aberdeen group, organizations with at least two years of mobile experience reported the following average performance improvements as a result of their mobile technology deployments:¹

- 31 percent increase in work orders completed per day
- 34 percent increase in service revenues
- 33 percent improvement in Days Sales Outstanding (DSO)

Businesses exhibiting best-in-class post-sales service characteristics and a successful track record with mobile solutions have seen performance gains that include 139 percent improvement in daily work orders completed, 263 percent improvement in service revenues, and 50 percent reduction in emergency service orders.

The Aberdeen Group's report indicates also that nearly 50 percent of firms that use mobile devices to enable on-demand work status, tracking, transaction, and communication are retaining 85 percent or more of their customers. By contrast, only 25 percent of firms that rely on spreadsheets for these processes are seeing this level of customer retention.

It's not surprising that mobile software solutions are making their way to the top of the investment priority list for field service organizations. The Aberdeen Group reports that nearly 25 percent of service-oriented firms are planning investments in mobile devices within the next 12 to 24 months. Utilities and consumer-driven firms are particularly bullish on mobile devices, according to the benchmark report. ²

¹ Aberdeen Group. Best Practices in Strategic Service Management. June 2005.

² Aberdeen Group. Field Service Benchmark: A Mid-Market Perspective. March 2005.

Microsoft Dynamics GP customers can now take advantage of a mobile solution that fits seamlessly with their existing ERP solution and that takes advantage of innovative Microsoft technologies – Field Service Anywhere for Microsoft Dynamics GP.

Field Service Anywhere Solution Overview

Ideal for companies looking for a robust mobile field service solution, Field Service Anywhere for Microsoft Dynamics GP is like having another field service expert on your remote staff, helping technicians record and retrieve the information they need to do their jobs. With immediate wireless access to customer and equipment information, technicians can make informed and educated decisions.

Field Service Anywhere has a user-friendly interface that allows technicians to log, receive, and follow service calls and the parts, labor, and expenses associated with the service call. Technicians also can transfer the information using communication methods that include direct network, wireless fidelity (Wi-Fi), or phone network connections. Information can be managed from any location, even while on the road, using Field Service Anywhere's remote capability.

Customer and equipment history information can be easily accessed to help diagnose problems and reduce trips to the field. Benefits may include reduced paperwork, increased technician productivity and a faster invoicing cycle. Real-time knowledge allows technicians to respond quickly and efficiently, helping them do their jobs better and helping you maximize your service profitability.

Technicians can open and close calls remotely, helping eliminate duplicate data entry and allowing dispatchers to concentrate on customer needs. Inventory and receivables management data are updated instantly, so you can keep a watchful and informed eye on where your company's time and money is being spent.

Field Service Anywhere puts your team close to the customer. With Field Service Anywhere on a device powered by Windows® Mobile, you can successfully build customer loyalty and build your revenue and reputation for excellent customer service.

Key Benefits

With Field Service Anywhere, businesses can:

Connect office and field staff – Enhance the flow of business and technical information via mobile devices — including Pocket PCs with phone capabilities.

Meet specific business requirements with flexible capabilities – Your specific configuration of your internal systems is extended into the remote field; integration with Microsoft Dynamics GP helps ensure consistent business processes and a seamless end-user experience.

Speed and optimize scheduling and dispatch – Quickly understand service urgency and resource status, and easily match the best resources for each task to help reduce response times, lower costs, increase customer satisfaction, and boost profitability.

Streamline the work order life cycle – Enable rapid response to service calls and speed work order processes — including creation, assignment, dispatch, closure, and billing. Efficient integration and automated processes help eliminate manual tasks, redundant data entry, and unnecessary paperwork.

Field Service Anywhere Solution Detail

Field Service Anywhere is a mobile extension of Field Service Management for Microsoft Dynamics GP. It enable technicians working in the field to report service call status, labor, parts, expenses, and miscellaneous charges using remote Pocket PCs and Pocket PCs with phone capabilities and a wireless or wired connection using devices running Windows Mobile 5.0 or later versions. This information can be transferred via bi-directional synchronization through a wired or wireless data or Wi-Fi network connection over the Internet, via a VPN connection, to the Field Service synchronization service within the Microsoft SQL Server™ database server. Field technicians can manage their technical information from any location, even while on the road, using Field Service Anywhere's remote capability. Because all technician updates are saved whether a technician is logged into the service call management system or not, you can be assured that critical information isn't lost or forgotten.

Key technical capabilities

- Integrates seamlessly with Field Service Management for Microsoft Dynamics GP
- Based on Windows Mobile 5.0 , SQL Server Mobile, and the Microsoft .NET Compact Framework
- Supports devices running Windows Mobile 5.0 or later versions for pocket PCs and pocket PCs with phone capabilities
- Delivers online and offline access to field service and customer information
- Synchronizes schedule to the minute for near real-time data
- Synchronizes manually or periodically to preserve battery life

Data available

- Customers and addresses
- Assigned and open service calls by technician
- Service call history for customer and/or equipment
- Installed equipment and serial numbers
- Service contract information
- Inventory items and prices
- Trunk stock inventory

Ease of use

- Quick onsite arrival and completion for date/time entry
- Seamless entry for new service calls in the field
- Easy updates to existing service calls with parts, labor, expenses, and additional charges

Return on investment

- Faster communication between technicians and dispatchers, including reduced phone time
- Improved service efficiencies that increase customer satisfaction
- Increased efficiency and fewer transposition errors with one-time data entry

Wireless e-mail and Web use may require data services from a mobile service provider at an additional cost. ISP and/or VPN may also be required. Connectivity and synchronization may require separately purchased equipment and/or wireless products (for example, Wi-Fi card, network software, server hardware, and/or ActiveSynch software). Service plans are required for Internet, Wi-Fi, and phone access. Features and performance may vary by service provider and are subject to network limitations. For details, contact the device manufacturer, service provider, and/or corporate IT department.

Best Practices: Service Management Strategies for Deploying Mobile Field Service Solutions

Best-in-class companies are capitalizing on mobile technologies for field service operations to drive margin, top line revenue, and customer retention for their organizations. The process of implementing a mobile solution does require careful evaluation to help companies optimize integration with existing ERP solutions and realize maximum return on investment.

Leverage existing and new technology to synchronize four service pillars

Businesses that are building ties between service and logistics are working towards consolidated "command centers" that overlay parts and technician planning and tracking systems and serve as a unified front end for visibility and exception handling.

In addition, leading businesses are exposing inventory management capabilities to field workers through mobile devices. In this model, field technicians can report parts usage data from the field. The system then automates the process for restocking vehicles by monitoring parts usage and adjusting stock counts.

Businesses that have already deployed Enterprise Resource Planning, order management, or CRM systems are well-positioned to add mobile service management functionality. These internal systems house critical customer and product data that is best leveraged by field technicians. When evaluating service technology providers, businesses, in particular mid-market companies – should ensure that full integration with existing systems is possible.

Address process deficiencies before deploying technology

Without exception, businesses following their partner's best-practices recommendations understand that changing an after-market service operation from a tactical cost center to a strategic profit center has as much to do with creative and efficient business processes as it does with technology selection. The implementation and rollout of a mobile solution should be designed around proven best business practices.

Clearly define requirements and success criteria before evaluating technology solution

The adage about an ounce of prevention also holds true for planning a service transformation. To select the appropriate technology solution and continue to derive maximum benefit from it over time, businesses must take the time to document and prioritize their requirements and criteria for success.

For a business seeking a high-speed, remote service platform that provides a rapid time to benefit, the essential components include:

- Rapid deployment with manageable costs and an expedient installation period

- Ease of use that minimizes training requirements for service technicians
- Few or no additional administrative requirements

Conclusion

To help realize strategic profit objectives, businesses with a field service component are turning to mobile technology solutions to streamline communication with field staff and help reduce or eliminate the need for costly and time-consuming trips to the office for meetings and paperwork. The same mobile technology can help field technicians to access technical and procedural information, which in turn helps them complete their assignments correctly the first time and adhere to standardized procedures or best practices. Mobile communications can also empower staff to quickly enter time and materials use, instead of reporting such information by phone for another employee to input or manually filing paperwork at the end of the day or pay period. This electronic information capture can help not only to increase reporting accuracy and managerial insight, but also provide accurate, current information for planning, billing, purchasing, and performance management.

For businesses looking to extend Microsoft Dynamics GP into the field, Field Service Anywhere for Microsoft Dynamics GP provides a mobile solution that offers seamless integration, ease of use, and functionality that bridges the gap between front-office service operations and back-office planning and processes.

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