Microsoft

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Essential Guide for the IoT Revolution in

FIELD SERVICE MANAGEMENT

A field service engineer with a propane delivery and fulfillment company just left a customer site. Unfortunately, it was a wasted trip because the issue was different from what had been reported, so he didn't have the right parts in his truck to fix the problem. He needs to go to the warehouse to get the part, but it's the end of the day, and he won't be able to return to the site. He is the only available engineer who knows how to fix this specific problem, but with other scheduled appointments taking priority, he may not be able to fix the issue for a couple days. This delay affects the customer's operations.

On the other side of town, an HVAC company gets an alert that a temperature gauge at a customer site has failed. The dispatcher checks availability of nearby field service engineers trained in replacing this piece of equipment and sends a message to deploy that person to the location. The technician arrives quickly, with parts in hand, and fixes the gauge before the customer even realizes there was a problem. When he is done, he confirms his next assignment on his phone, which triggers a notification to the customer that he is on the way.

How is this company able to provide a completely different level of service for their customers than the other company? By leveraging the Internet of Things (IoT).

IoT Connected Machines and Devices are
REVOLUTIONIZING FIELD SERVICE MANAGEMENT

From utilities to banking services to equipment maintenance, field service organizations are working with increasingly complex, high-tech industrial equipment. With an IoT connected environment, it's possible to collect critical production and operational data from every piece of equipment or appliance in the field. In fact, one of the many benefits of IoT is that its connected sensors can determine if a machine is down or predict when it is likely to need maintenance.

Because of this capability, IoT is well on its way to streamlining and optimizing field service work on every level. Instead of a "break-fix" approach, IoT allows field service teams to become proactive in their approach and preemptively provide service (as illustrated in the scenario above). This model drives quality support and customer satisfaction and lowers administrative and field resource costs, as well.

Revolutionizing field operations. With IoT connected sensors, field service organizations can determine where issues are occurring and automatically trigger a service request to a technician. The request can be sent immediately to the mobile device of the most qualified technician who is closest to the location of the repair. The technician can then respond to the customer with updates or communicate with dispatch as necessary. In addition to resulting in more rapid response times, IoT enables organizations to remotely diagnose issues, so technicians arrive with the right parts.

Revolutionizing cost models. Traditionally, field technicians would have to physically inspect equipment to understand the problem. With IoT, organizations can access this data via mobile devices and even communicate with IoT devices to perform remote fixes or maintenance, so customers can receive service without ever dispatching a live technician. The ability to provide remote service not only reduces man hours, it also results in significant savings on fuel and fleet maintenance and other related operational costs. In addition, according to research conducted by The Service Council, the average first-time fix rate for an organization is about 77 percent.[1] This means that 23 percent of the time, field service technicians need to do a repeat or follow-up visit. By leveraging IoT data, organizations can increase first-time fix rates, thus reducing costs and increasing customer satisfaction.

Revolutionizing transparency and communications.
No longer keep customers wondering what is going to happen and when. With the data generated from IoT enabled communication tools, field service organizations can keep customers updated with information such as technician arrival times and the status of work orders.

Three Ways Microsoft Dynamics 365 Revolutionizes Your Field Service Management

Fundamentally, field service is customer service, and connectivity is the cornerstone for keeping customers informed and optimizing technicians' time and talent. According to Aberdeen, 74 percent of the best in class service providers use IoT technology to track serviceable assets and equipment.[2] IoT employs a network of sensors to collect critical production data and uses cloud software to turn this data into valuable insights. Yet to take advantage of IoT, you need to have the right field service management solution.

Microsoft Dynamics 365 for Field Service is an Internet of Things (IoT) powerhouse placing your technicians out in front from the time (or even before) a call comes in until on-site billing completion when the job is done - all from the data delivered on their mobile device.

With the flexibility and customizability of the cloud, Microsoft Dynamics 365 for Field Service simplifies your steps, saves time, and points to profit with a single, successful solution. Or, it can work with your existing ERP to layer in the important field services functionality you need to proactively engage with customers, reduce costs, and improve customer satisfaction. Here's how:

1. Lets you be more proactive and efficient

Using Azure IoT sensors, Dynamics 365 for Field Service connects customer equipment to your desktop with digital monitoring, so you know when maintenance is needed or receive an alert when there is a malfunction. With Dynamics 365, malfunctions can be addressed remotely first. And, when remote correction isn't possible, there is seamless connection (and IoT direction) to on-site solutions.

In addition, Dynamics 365 for Field Service lets you automate specific actions over the course of the work order to ensure a consistent and complete customer experience. For example, once a technician is dispatched to the work site, an automated text message can be sent out to notify the customer. Similarly, when a work order is marked as complete, the platform can immediately send the customer a

follow-up customer satisfaction survey. This automation reduces the volume of labor-intensive activities associated with receiving work requests, sending appointment reminders, handling inquiries, and conducting after-sales support.

Dynamics 365 enables you to track equipment success and failure rates — empowering you to make proactive decisions about what resources you place in the field. Digital transformation with Dynamics 365 will launch your company into the heart of services-led functionality, including:

- Detect, diagnose, and solve problems with IoT and predictive technology — before customers realize there's an issue

- Automatically create and schedule work orders, dispatch technicians with the right skill sets and equipment, and enable them to access customer information from their mobile devices

- Go from scheduled services to just-in-time predictive maintenance; repair, clean, and replace parts only when needed

2. Optimizes resources and processes

Dynamics 365 streamlines the process for timely delivery while reducing paperwork and connecting warehouse capabilities. In addition, Dynamics 365 saves manual effort by increasing operational efficiencies and reflecting a truer picture of service provided all the way through to the customer.

Dynamics 365 for Field Service allows for automatic information integration — prompting your technicians, for example, when they've not closed out a workorder. In addition, information that technicians capture in the field can be flowed through your warehouse straight onto the invoice, including photos and additional service suggestions — offering your customers value-added benefits.

- Reduce warehouse shrink by digitally tracking supplies

- Track field equipment level of performance (failure/ success points)

- Automate Return Material Authorizations (RMA) and Return to Vendor (RTV)

- Equip technicians with the right materials to reduce job resources and parts waste

- Consistently deliver work order specificity

Microsoft Dynamics 365 for Field Service helps solve complex problems faster with Remote Assist on HoloLens devices. Technicians stay heads-up and hands-free while sharing what they see with remote experts.

Further, you can dispatch and deliver with the military precision maneuver of Time over Target (ToT) and decrease the time technicians waste while waiting for their next assignment. Using GPS technology and remote notification, Dynamics 365 auto alerts field technicians when service is required. Using AI, technicians are directed according to where they are in the field, what they have on their truck and who is the best service practitioner for the job; taking travel time automatically into account.

With complete digital field service connectivity that enables tighter control over warehouse stock, Dynamics 365 can help organizations:

- Automate scheduling to fit in more appointments per day and match specialists with customer demand for specific skills, priority, location, and estimated appointment duration

- Empower dispatchers to manage resource assignments across multiple work orders using an interactive, drag-and-drop schedule board

- Streamline inventory management and improve first-time fix rates by synchronizing and tracking inventory down to the truck level with real-time visibility

3. Delivers a superior experience for your customers

Technicians play an integral role in customer satisfaction and company-wide success. Empowered with the right solution and equipped with the right tools before they ever get on site, Dynamics 365 data-driven capabilities transitions your technicians from "service provider" to "trusted expert advisors."

With connected IoT and Dynamics 365, customers can receive the level of service they are accustomed to in other channels (retail, travel, etc.) and have come to expect in all their interactions. This company-wide customer commitment allows for predictive, preventative "white glove" customer service that ultimately reduces customer downtime and helps improve their operations.

Dynamics 365 makes digital transformation a desirable initiative for your technicians when they realize how it works for them every day. It can be configured to meet industry specific needs to maximize technician insight and provide them value-added tools.

State-of-the-art technology such as mixed reality video calling, annotations, and file sharing allow technicians to solve problems correctly the first time – resulting in increased customer satisfaction and reduced costs.

- Build customer trust with a more transparent customer service experience that seamlessly shares quotes, contracts, and scheduling information

- Empower customers with an interface that makes it easy for them to self-schedule appointments and keep track of service activities

- Communicate proactively by providing your customers with real-time technician location tracking and automated voice and text appointment reminders

- See things from the customers perspective by sending personalized surveys immediately after service calls

[1] www.FieldTechnologies.com
[2] www.Aberdeen.com

GAIN MARKET STRENGTH WITH
VELOSIO AND MICROSOFT DYNAMICS 365 FOR FIELD SERVICE

With Microsoft Dynamics 365 for Field Service, you can revolutionize field operations and move your organization from reactive to proactive service - allowing you to increase customer satisfaction, reduce costs and win in a competitive market.

And, when you partner with Velosio for optimized delivery and implementation, you will build on that revolution and gain even more market strength.

Velosio can move you to the frontlines of IoT and other digital capabilities found in Dynamics 365 for Field Service. We're Dynamics 365 and cloud technologies experts who enable you to adapt quickly to the platform and accelerate time to market; drive innovation in your organization to transform customer interactions; and invest with confidence in the reliability, flexibility, and affordability of the Microsoft cloud.

With more than 30 years of business systems experience, you can count on us to help you understand and take advantage of all the Microsoft Dynamics 365 platform has to offer, so you can realize business value faster, simplify the process of deploying technology, and move your business forward.

We empower clients to go from what is to what is possible through innovative technology, specialized expertise and strategic partnerships. Let Velosio help your business on its journey to next.

GET STARTED!
Request a conversation with a business technology expert:

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