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point^{of}VIEW

FOUR KEY STEPS TOWARD ELEVATING FIELD SERVICE CUSTOMER EXPERIENCE

BUSINESS
CONSULTANTS

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A customer's experience with the field services organization has a lasting impact on their overall impression of the company, which can positively or negatively impact customer satisfaction, retention, word of mouth, and future sales.

Often, though, field service operations are disconnected from corporate initiatives to enhance customer experience. Aided by technology, leaders are taking steps to mobilize their field service organizations in the race to respond to evolving expectations and distinguish experience from competitors.

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READ THIS PAPER TO LEARN:

- ◆ Four ways that field service organizations can impact and elevate customer experience
- ◆ Features of modern technology that can improve productivity and deliver other benefits
- ◆ Practical starting points for transforming field service operations

In the race to differentiate on customer experience, don't overlook one of your most important assets: your field service organization

By now, most business leaders recognize the importance and value of a positive customer experience. In a recent article, "[State of the Connected Customer](#)" (Salesforce Research, 2018)¹, 80% of customers said that the experience a company provides is as important to them as its products or services.

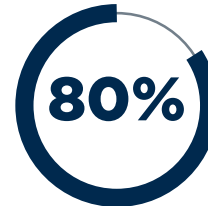
However, good experience is not necessarily enough. The bar is rising; 67% of respondents said that their standard for good experiences is higher than ever. Today's customers expect seamless handoffs between departments and channels, for example, between sales and service teams, with 70% of customers saying such connected processes are very important to winning their business.

When designing customer experience strategy, companies need to consider, optimize, and connect all key touchpoints. This requires heightened focus on the experience delivered by the field service organization, a function often disconnected from marketing and customer experience strategy.

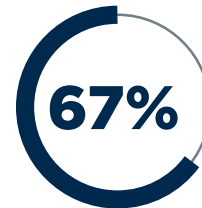
Field service organizations can support the organization's overall effort to elevate customer experience by doing four things well:

- ◆ Build capabilities for driving revenue
- ◆ Increase productivity
- ◆ Deliver a consistently high level of customer service
- ◆ Target technician experience as well as customer experience

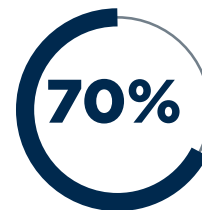
RAISING THE BAR



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70% of consumers said connected processes are very important to winning their business

Build capabilities for driving revenue

Plenty of studies have illustrated the importance of retaining and growing revenue from within your existing customer base. It is more expensive to acquire a new customer than it is to keep a current customer. Additionally, retaining and growing customers has an impact on revenue and profitability. Research by [Frederick Reichheld](#)², creator of the Net Promoter System of management, found that increasing customer retention rates by 5% increases profits by 25% to 95%. Another study found that repeat customers spend 67% more than a new customers (["Achieving Big Customer Loyalty in a Small Business World"](#))³.

Your field service technicians' direct interaction with customers—potentially over long time periods, depending on the type of business—have the ability and opportunity to participate actively in "selling" to a customer and progressing the customer relationship to trusted advisor status. For example, many organizations now provide sales incentives above and beyond base pay, such as quarterly bonuses, to field sales personnel to encourage up-sell or cross-sell activities upon completion of a service visit. Alternatively, if a technician visit was in response to a break-fix request, then you can equip the technician with the ability to sign the customer to an ongoing preventative maintenance plan.

If your organization prefers not to engage field service personnel directly in sales, then it can enlist their support indirectly. For example, you can train technicians to identify new sales and service opportunities and log them into your CRM system following a visit. A sales representative can then follow-up on the opportunity.

Increase productivity

Cost reduction and productivity improvement are continuous challenges for field service organizations. Advances in technology enable you to automate traditionally manual field service processes and make great strides in increasing productivity. For example, tools such as Salesforce's Service Cloud and Field Service solutions offer capabilities that help:



IMPROVE FIRST-TIME FIX RATE

PERCENTAGE: One of the key tenets of operational productivity improvement is

increasing the fix rate for the first on-site technician visit. Technology plays an important role by ensuring that **(1)** the technician you dispatch for the job has the right set of skills to complete the service successfully and **(2)** the technician has the right tools and parts on the van to complete the repair, before traveling to the customer's site.



OPTIMIZE TECHNICIAN

UTILIZATION: As your business continues to grow, you need to make sure you are

optimizing field service technicians' on-site time and the number of jobs that they can complete per day. Many organizations continue to use spreadsheets, sticky notes, and white boards to manage scheduling and dispatch functions. Bringing this capability into a field service technology solution provides tools for technicians to manage on-site time and minimize drive time.



INCREASE ACCESS TO KNOWLEDGE AND SERVICE-RELATED

INFORMATION: Establishing a robust

knowledge base enables technicians to access information they need to resolve an issue quickly and at the point of need, saves time, and boosts productivity.

CENTRALIZE CASE MANAGEMENT: Using a centralized tool to track customer interactions provides all call center agents with information they can use to track, route, and resolve cases prior to dispatching technicians.



Deliver a consistently high level of service

Your technician may have done a great job fixing a customer's television issue on the first call and provided the customer with some valuable advice for the future. But if that technician arrived four hours late and the customer received no updates about the delay, chances are any positive aspects of the service visit will be negated—and worse, the customer may complain to friends about the experience or post a bad review on Yelp. A survey by [American Express](#)⁴ found that Americans tell an average of nine people about good experiences and nearly twice as many (16 people) about poor experiences.

Customers increasingly expect service that is personalized and connected, from start to finish. For example, a recent poll by [CSG International](#)⁵ found that

89% of customers want an “Uber-like” technician tracking service, and 70% want to see the technician's name and photo. More than 85% of customers said they are willing to pay a premium for conveniences such as having a choice of arrival time or one-hour service windows.

Delivering a consistently high level of service and experience starts with understanding expectations and how they are evolving. From this insight, you can target strategies for meeting, and hopefully exceeding, expectations. Given that customers have high expectations around visibility into the service process, as discussed above, enhancing communication about the service call may be a prudent area on which to focus. These areas might include:

- ◆ A service report that summarizes the work order, appointment, and estimated timeframe for completing the job
- ◆ A profile and photo of the technician
- ◆ A tool for tracking the technician's current location and expected arrival time
- ◆ A mechanism for communicating adjustments to arrival time

PERSONALIZING THE CUSTOMER EXPERIENCE



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of customers want an “Uber-like” technician tracking service



85%

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70%

of customers want to see the technician's name and photo

Target technician experience as well as customer experience

Winning in the marketplace starts with winning in the workplace. It is critically important that technicians have both the knowledge and tools to provide excellent service and the confidence that they are well equipped to deliver on expectations.

Steps to engage and retain field technicians should include adequate and continuous training, as well as building an accessible knowledge base around material and repair processes that provide an easy way for technicians and support personnel to access information. A properly designed knowledge base also helps make sure that critical information doesn't walk out the door when technicians leave or retire—a concern for many field service organizations that face the challenges of an aging workforce.

Mobile devices that allow individuals to collaborate, find technical content, and see comprehensive customer information can also improve the service experience for the personnel providing it, not to mention boosting their productivity.

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How to move forward

Most field service functions recognize the importance of delivering a satisfactory customer experience. However, many functions struggle with how and where to start when addressing the four areas above. Taking these steps can help you chart a practical course forward:

- ✦ **RESEARCH BEST PRACTICES IN FIELD SERVICE EXPERIENCE.** Invest time to understand what distinguishes the experience provided by leading field services organizations.
- ✦ **ESTABLISH A VISION FOR YOUR FIELD SERVICE ORGANIZATION.** Gather key stakeholders together to discuss and document what your future field service experience looks like, the goals driving that vision, and the principles that you will use to guide progress toward that vision.
- ✦ **TAKE AN OUTSIDE-IN APPROACH.** Gather as much information as you can through the lens of your customer. Map the customer journey and study each touchpoint and interaction. This will help you identify and target areas for improvement.
- ✦ **EXPERIENCE A “DAY IN THE LIFE” OF FIELD TECHNICIANS.** Spend time in the field with your technicians, observing and discussing how they do their job, what information they use to complete a job successfully, and any perceived roadblocks to providing service as expected by their customers.

These initial steps will provide important insight and data for beginning field service transformation. You will then be able to move quickly to introduce and begin realizing the benefits of modern enabled technology that is transforming field service and improving your ability to meet customer expectations.



About West Monroe Partners

West Monroe is a national business and technology consulting firm that partners with dynamic organizations to reimagine, build, and operate their businesses at peak performance.

Our team of more than 1,000 professionals across nine offices is comprised of an uncommon blend of business consultants and deep technologists. This unique combination of expertise enables us to design, develop, implement, and run strategic business and technology solutions that yield a dramatic commercial impact on our clients' profitability and performance.

For more information, please visit www.wmp.com.

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