

# Field Service and Customer Care

## Transforming the Customer Experience

ORACLE WHITE PAPER | APRIL 2016





## Introduction

Within the field service industry, the customer service function is traditionally viewed as a cost center. It's necessary to maintain customer-facing operations in order to deliver, install, or maintain products. Customer service is an essential part of doing business, particularly in the business-to-business (B2B) space or within maintenance organizations.

Field service technicians or call center representatives are typically the only personal contact customers have with vendors. Making the most of these touchpoints and building solid customer relationships is an essential part of customer retention, brand differentiation, and a healthy bottom line.

Additional challenges include reduced margins; increased product- and service-based competition; and regional, national, or global expansion of products and services. It's time to consider the customer service organization as a potential profit center rather than a cost center.

To truly transform a customer service operation, organizations need to understand how their customers are changing, how their service model needs to change, how to anticipate customers' needs, and how to strategically address those needs. Then organizations can learn how to accomplish all of this by leveraging a sophisticated, cloud-based, field service engine to close the loop for end-to-end customer service delivery.

---

*"The customer experience will reign as the primary investment target in 2014, as 68 percent of businesses plan to increase their customer management spend."*


*—2014 Call Center Executive Priorities Report*

---

## Self-Service and the Changing Customer Landscape

Best-in-class field service organizations understand that customer dynamics have changed and will continue to evolve. As the number of tech-native consumers grows, organizations will be expected to keep pace by offering products and services that fit customers' lifestyles. Often, this means an online portal or a mobile app that allows customers to look up account information, pay bills, and schedule appointments 24/7. Increasingly, traditional business hours do not govern customer communications.

Self-service empowers customers to be in contact with service providers at their own convenience. As consumers become more accustomed to up-to-the-minute information about daily tasks and events—tracking a flight from a smartphone, for example—they expect to have insight and a degree of control over more types of experiences, including service in their home or business. People want to know where their technician is, what time the technician will arrive, and how long it will take to complete the job. If they need to cancel or reschedule an appointment, they prefer to do it with a minimum of inconvenience, preferably through an automated system.



Not only is this a matter of convenience, but it also reassures customers that they can trust your service organization as well as individual technicians and contractors. By sending customers a text or an e-mail that includes the name and picture of the technician who will arrive at their home or business, you can build trust and loyalty resulting in fewer canceled appointments, customer no-shows, or dissatisfied call center contacts.

---

*“Deriving strategic advantage from loyal customer relationships requires true differentiation. Often that means not just great products at competitive prices, but also dependable delivery, tailored services, and a high level of responsiveness and collaboration.”*

—Bain & Company Brief, February 2014

---

## Machine-to-Machine, Technician Enablement, and the New Service Model

In the traditional service model, customer service was mostly transactional—a customer needed something, and a vendor provided it. For instance, if a copier at a large accounting firm required routine maintenance someone at the firm would call or e-mail the copy machine vendor and request a service appointment. A technician would show up to the office, perform the service, and leave. The whole scenario would be repeated again the next time the machine indicated that routine service was required. Meeting service-level agreements (SLAs) was a singular goal and the largest measure of how well the service model was working.

The new model is focused on customer success. SLAs are still an important measure of service quality, but in this scenario the copy machine vendor monitors the firm’s copier remotely via machine-to-machine (M2M) communication. Using a mobile workforce management solution, the vendor interprets this actionable data to anticipate a repair or routine maintenance and proactively schedule an appointment. While onsite, the technician not only performs the service but also provides a quick training session to new employees, shows how to use an underutilized feature that will save the company money, and suggests additional products or services that will help the company achieve its goals.


Successful field service operations also deploy technicians that have access to up-to-date work instructions in the field, meaning that appointments are completed more quickly and more first-time fixes are achieved. Service organizations that can’t provide these advantages will lose business to competitors that can. Just as with business-to-consumer (B2C) companies, B2B organizations are discovering that their customers face the same pressures and tight margins as the vendors they use, and have little tolerance for issues and problems. A missed service appointment or SLA failure will result in losses for the vendor, the customer, and their customer—a real domino effect. To prevent this, B2B companies must also increase visibility over field activities, anticipate potential issues, and offer customers the option of self-service.

A customer success-oriented model also benefits the vendor by providing a built-in opportunity to upsell to existing customers. This provides customers with services they need and allows the vendor to mine existing customers for additional revenue. The probability of selling to a new prospect is 5 to 20 percent, but the probability of selling to an existing customer is 60 to 70 percent.<sup>1</sup>

Enabling field technicians to function as sales representatives—offer additional products and services, renew contracts, collect signatures, and more—is possible with integrated field service management technology. Field representatives can eliminate paperwork and save time by getting customer signatures right on their mobile devices.

---

<sup>1</sup> Farris, Paul W.; Bendle, Neil T.; Pfeifer, Phillip E.; Reibstein, David J.; *Marketing Metrics: The Definitive Guide to Measuring Marketing Performance*. Pearson FT Press, 2010.



In the customer success model, the vendor is actively engaged in its customers' success and works hard to help them reach their goals. Research by Gartner<sup>2</sup> indicates that factors such as vendor interaction and personalized offerings based on real needs are important in growing and maintaining relationships with customers. While it's important to meet SLAs, it's also increasingly important to delight the customer rather than just serve them. In the new model it's the vendor, rather than the customer, who bears the responsibility for making it work. The result is an increased number of first-time fixes.

---

*"A customer is four times more likely to defect to a competitor if a problem is service-related than price- or product-related."*

*—Bain & Company Brief, October 2012*

---

## Tuning In to Customer Needs

At one time it was enough to simply keep customer records and be able to look back at what customers needed over time. Now, best practices include anticipating future needs based on what can be learned about customers, what they're saying to technicians or salespeople face-to-face, and their behavior. In the new customer care model, deep customer knowledge is necessary so vendors can focus on insights, which provide actionable data, rather than facts, which only say what happened in the past.

It's still important to keep detailed customer records, but now consider what might be learned from such records. Does the customer replace equipment every two years like clockwork or wait until the equipment breaks down or becomes obsolete? Do they prefer to be contacted by phone or by a representative visiting the office? Do they hire seasonal employees or not? Based on these records, vendors can learn to anticipate needs and set customers up for success. These pieces of information are important because it is no longer enough to simply offer the lowest price. Businesses must also empower customers to be successful, and act as partners in achieving and maintaining that success.

Challenges in this space include an aging labor force, with many experienced technicians retiring or transitioning to back-office positions. As these people leave the field, their product and customer knowledge often leaves with them, unless it has been collected and codified for easy retrieval in the future. The aging workforce also means that companies must leverage talent over a broader range of customers, which can lead to inefficiencies or customers waiting longer for service.

If information about customers, equipment, and other events is collected and stored in the cloud, it will always be easily retrievable through a field technician's mobile device. With the power of mobility, it will no longer matter which individual technician arrives to complete the service appointment. As long as the technician arrives on time and is enabled to solve the problem at hand, customer satisfaction will follow.

Best-in-class field service organizations know they must shift the perception of value from individual technicians to the company. Continuously improving information collection and storage ensures that customer records and product information are accurate and easily accessed by all technicians, underscoring that the vendor is trustworthy and customer-oriented.

---

<sup>2</sup> Gartner, "Why Companies Need to Market—and Not Just Sell—to Existing Customers," March 6, 2014.



## Implementing Mobile Workforce Management

To transform the customer service model, it's important to manage field activities as the frontline of winning and keeping customers. Maintaining complete visibility over field activities is not only valuable but vital. Managing customer information, product changes, service manuals, and other important information by paper or through legacy back-office systems is impractical and risky, almost certainly resulting in customer dissatisfaction.

---

*"62 percent of organizations view customer experience provided via contact centers as a competitive differentiator."*

*—Deloitte Global Contact Center Survey, March 2013*

---

This kind of visibility requires a field service management solution that wraps around field activities, from technicians to trucks. Mobility is essential in gaining insight into the field, as well as connectivity between the field, back office, and customers. Employees at work on jobs can contact experts back at the office or other nearby technicians, or access a knowledgebase to search for answers to questions or product information needed to complete a task.

Technology can also provide employees with more of one very valuable asset—time. Employees do not work longer hours; they just use their workday time more efficiently. Employees with more time in their day can give more time to customers.

### Customer Experience Case Study

A major telecommunications firm that wanted to transform its business from bureaucracy-riddled utility to world-class competitor made the decision to refocus the entire organization on the customer experience. Managers lowered costs, reduced complexity, and increased operational efficiency—and the company's field force improved its quality of service while increasing productivity by 70 percent. The key to this improvement was equipping field service technicians with better tools, better training, and improved scheduling and routing. Technicians received prompt customer feedback so they could understand strengths and areas with room for improvement.

## Conclusion

Retaining customers often depends on reliable delivery, tailored services, and appropriate responses to issues. Deploying field service technology allows your company to make the most of every customer touchpoint after the initial purchase. Efficiency is ramped up while costs are controlled.

Field service management technology provides the following benefits:

- » Enables visibility into the field, arming call center representatives with accurate, real-time information
- » Allows call center representatives to respond to both customer preferences and workforce capacity
- » Empowers the call center to support your organization's focus on the customer
- » Gives customers peace of mind with extra safety and security measures
- » Emphasizes customer convenience via self-service and 24/7 access to appointment details
- » Focuses on customer success

When field service technology is deployed in the right way, these benefits extend to everyone, from the call center representative who schedules an appointment to the customer who receives the service.



**Oracle Corporation, World Headquarters**

500 Oracle Parkway  
Redwood Shores, CA 94065, USA

**Worldwide Inquiries**

Phone: +1.650.506.7000  
Fax: +1.650.506.7200

CONNECT WITH US



[blogs.oracle.com/oracle](http://blogs.oracle.com/oracle)

[facebook.com/oracle](https://facebook.com/oracle)

[twitter.com/oracle](https://twitter.com/oracle)

[oracle.com](http://oracle.com)

**Hardware and Software, Engineered to Work Together**

Copyright © 2016 Oracle and/or its affiliates. All rights reserved. This document is provided for information purposes only, and the contents hereof are subject to change without notice. This document is not warranted to be error-free, nor subject to any other warranties or conditions, whether expressed orally or implied in law, including implied warranties and conditions of merchantability or fitness for a particular purpose. We specifically disclaim any liability with respect to this document, and no contractual obligations are formed either directly or indirectly by this document. This document may not be reproduced or transmitted in any form or by any means, electronic or mechanical, for any purpose, without our prior written permission.

Oracle and Java are registered trademarks of Oracle and/or its affiliates. Other names may be trademarks of their respective owners.

Intel and Intel Xeon are trademarks or registered trademarks of Intel Corporation. All SPARC trademarks are used under license and are trademarks or registered trademarks of SPARC International, Inc. AMD, Opteron, the AMD logo, and the AMD Opteron logo are trademarks or registered trademarks of Advanced Micro Devices. UNIX is a registered trademark of The Open Group. 0416

Field Service and Customer Care  
April 2016



Oracle is committed to developing practices and products that help protect the environment