

A Buyer's Guide To

FIELD SERVICE SOFTWARE

This guide is designed to lay out the basics of field service software and help steer you toward a solution that will help you get more organized so you can win more jobs.





Introduction

No one launches a business hoping to fail. But success is daunting too, especially for field service companies. There is staff to hire, manage and train, leads to track, customers to contact, estimates and invoices to generate, payments to collect--and none of this has to do with the actual service you're providing.

At some point many field service companies figure out that they can't go it alone, and they need software that is specifically geared toward their business needs. Whether the integration with accounting systems or the ability to take payments in the field, field service businesses face unique challenges. But vetting the options is daunting; how do you go about deciding what you need and which solution is best for your business?



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Understanding Field Service Software

Overview

If you've made it this far, there is a good chance that you work in a field service industry, one that relies on staff or subcontractors deployed to customers' homes or locations to do assigned jobs. One significant development in the past several years is the availability of office management-type software to support field businesses of all sizes. This guide is designed to help you understand what field service software is, how it can help your business, and how to find the best provider for your needs. Let's start with the basics.

What is Field Service Software?

Simply stated, it is software a business uses to organize workers out in the field and the back end office activities to support those workers. This includes tools to help businesses manage leads, work orders, scheduling, dispatching, employees, customers, payments and inventory.

This isn't How Our Business Runs

40 years ago, if you had a leak you'd call Town and City Plumbing. The receptionist would pick up the phone and check the plumber's wall calendar to see when he could be there. As the customer, you would pick from the available dates and times. Maybe the appointment gets rescheduled a few times, which means a lot of back and forth with the receptionist. Eventually the plumber shows up, fixes the leak

and hands you a clipboard with the charges to sign. Then you send a check at some point to cover the expenses. Chances are that Town and City Plumbing is still doing business the same way 40 years later and hasn't seen any significant increase in their efficiency or growth in their business over that time period. Why? Because, given the way the business is operating, there will always be time and resource constraints that can't be overcome.

There is a Better Way

The scenario above is full of inefficiencies, opportunities for error, and double data entry. Field service software turns all of that on its head, making managing and scaling operations easy, because all lead, customer, staff and schedule information is stored in one place and is easily accessible. Customer data, job information, and schedules are available to anyone on your team with an internet-enabled device, meaning a smartphone, tablet or laptop. And some solutions, like mHelpDesk, provide the ability for you to send custom or automated text to customers or field workers as job reminders or to reschedule appointments. Field service software becomes your mobile office manager, allowing you to get more done, faster and with fewer mistakes.

Understanding Field Service Software

Why would a Field Service company decide it needs software?

The reasons vary from business to business. The primary benefits of field service software include the ability to get organized, manage your business more effectively, win more jobs and grow your business. Most field service companies looking for software have determined that managing schedules via a whiteboard or sticky notes is inefficient, error-prone, and requires a lot of double data entry. Field service software solves these headaches.

Field Service Software used to be an enterprise thing

Field service management software is nothing new. Enterprise businesses—those with hundreds of field workers and billions in revenue—have been using them for decades. They have been able to scale their work forces and their businesses easily through the

organization that field service management software provides. However, this type of software has also been both complex and expensive to set up, which is why it has been reserved for the few that can afford the systems and staff to support them. A new generation of software designed specifically for small to medium-sized field businesses is changing that.

“The Cloud” versus on-premise software

First, let’s go over the basics of how software is delivered today. You’ve probably heard about “the cloud”. The cloud is a way to deliver software to users via the Internet; there is nothing to install, and you simply access the software using any web browser or modern mobile device. If you’re evaluating on-premise versus cloud software for your business, here are some key considerations:

	WITH CLOUD	WITH ON-PREMISE
Data Security	Minimal risk of data breach	Company data is managed internally for increased security
Costs	No increased costs for additional equipment or infrastructure	Large initial cash outlay for equipment (and every few years for new equipment or maintenance)
Maintenance	No need for dedicated IT staff	Dedicated IT staff for equipment maintenance
Agility	Third party does update and product enhancements on a regular basis	Feature “lock-in”; usually limited to solution features at time of purchase
Mobility	Broad accessibility for internet-enabled devices	Access generally limited to devices on-network

Understanding Field Service Software

The Costs

When it comes down to it, a cloud solution is almost always the more cost-effective solution over the long run. With an on-premise solution you're determining all of your requirements and costs up-front when you purchase the solution because there is equipment and associated software to be installed; there is very little opportunity to scale up or back later based on the state of your business over time. With cloud, the amount of storage or utility (and the associated costs) can be easily adjusted based on the decisions you make about your business.

Licensing and Updates

How often do you think companies make improvements and updates to the software that you use on an everyday basis, both in your personal life and in your business? The answer really often. Many companies release software changes every week, and most release enhancements at least once a month. When you're leveraging an on-premise solution, you don't benefit from any of those new features that support the needs of changing markets and

customers. You are locked in with the product, as-is, until your next contracted physical update.

Equipment Maintenance

Speaking of equipment, servers and computers break and need regular maintenance. Therefore, an on-premise solution often requires specially trained, dedicated IT professionals to service that equipment. This is an on-going cost that is eliminated with cloud software where someone else takes on the burden of continued updates and upgrades.

Mobile Accessibility

Mobile, in-field accessibility via phones and tablets is of utmost importance to workers in on-location services. That's another area where cloud and on-premise solutions differ; the cloud is built with accessibility and mobility at its core. By running your business with cloud-based software you ensure the ability to access your data, whenever and wherever you need it.

A decade ago many experts would argue the cloud is better suited for small to medium-sized businesses, and that on-premise is better suited for the enterprise businesses with thousands of field workers. Today, the cloud has become the default across the board.

Assessing Field Service Software

Do you really need Field Service Software?

There are plenty of good reasons to consider field service management software. If you or anyone on your team has ever had trouble finding a service order, customer history or form, then you could probably benefit from a strong field service software solution.

Do you spend more time than you'd like on creating estimates and handling your billing?

Do you have challenges scheduling (and rescheduling) your field workers based on customer needs?

Do your workers frequently have to return to headquarters to collect information, pick up new work orders or grab parts?

Have you ever run low on parts at the last minute?

If you answered "yes" to any of the above then you could probably benefit from a field service software solution.

What can Field Service Management Software do for you?

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Grow Your Business

Technology is an enabler. By design, technology is designed to help its end user become more efficient and effective. When you spend less time coordinating and executing on back end operations, you have the ability to grow your business.



Deliver Better Service

Customers love when you can schedule their jobs quickly. They also love when you show up on time, provide status updates, deliver accurate estimates, give them convenient payment options and make it easy to request your services. Field service software helps you do all of this.



Get Better Organized

Software helps you make sense of all the noise that comes with running a service-based business. Instead of reaching in ten different directions and fumbling through dozens of pieces of papers, software consolidates all of your mission-critical data into a system that simplifies everything.



Save Time

One of the greatest benefits of using a field management solution is that it will save you money in areas like overhead, fuel and missed opportunities. Schedule optimization, routing and electronic forms are features that can significantly drive down your costs.



Reduce Costs

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Assessing Field Service Software

What Field Service Software Can't Do For You

Understanding what field service management software can't do for you is important too. The software is generally not designed to:



Improve Your Sales Process

Many first-time buyers make the mistake of confusing a field service management solution with a customer relationship management (or CRM) solution. Field service management software is focused on the service side of your business, and while it may help you manage your customer data, it is not meant to be used as a tool to manage sales. Some field service management solutions will offer light sales tracking capabilities, but it's not the core focus of the system.



Replace Your Workers

Field service management solutions augment your workers and make them more efficient by giving them tools to improve the way they work. It isn't meant to, and couldn't, replace them.



Automate Your Marketing

Field service management solutions generally do not focus on marketing. It won't send an email blast to your customers, send thank you cards or generate coupons. Many do integrate with marketing automation solutions so they can work together, but field service software does not aim to market to customers.

Why Mobile Is A Must

A typical small business using field service management software is generally made up of one or two dispatchers headquartered in the office with several workers out in the field. It is imperative that any field service software provide connectivity and visibility between dispatchers and field workers.

Dispatchers should be able to send jobs to the field worker's mobile device, where the field worker can perform tasks such as:

- Update the status of the work order
- Accurately keep track of the parts they use
- Track their time and materials used on a job
- Communicate important updates back to the dispatcher
- Create estimates and invoices out in the field

Quality field service software offers mobile applications (apps) to support these operations by the field staff. There are two main types of mobile apps available:

Native Mobile Apps

These are usually free apps that you download on Apple's iTunes app store or Google Play. They can run in the background on a smartphone or tablet and are typically faster than mobile web applications. In addition, native apps have full access to all the device's hardware features. The device can track the real-time location of the field worker, and also allows field worker to take photos and attach them to the jobs while out in the field.

Mobile Web Apps

These are browser-based apps that rely on the device's web browser. They typically have no access to the device's hardware (like GPS and camera features). So you can't track the location of field workers or take photos to send back to the office.

Choosing Field Service Software

Before shopping for a field service management solution, it's important that you first understand your business's particular challenges and needs. We recommend starting with three to five pain points that you are struggling with most in your business.

Are you frustrated with your scheduling process?

Have you lost one too many service orders?

Is your billing process too slow?

Do you suspect your field workers could complete more jobs each week?

Identify your pain points and then apply those to the available options to determine which solution is right for you.

There Is No Silver Bullet

Why should you only identify the three to five biggest pain points and not everything you'd like to improve? Most commercial, off-the-shelf solutions can't meet every need for every business. Unless you are prepared to pay a significant sum to hire a seasoned programmer to build a custom, dream solution for you, there will likely be some gaps between your ideal solution and those that are available. The goal of purchasing an off-the-shelf product is to find something that meets 80% to 90% of your requirements. Don't let the missing 10% deter you from moving forward with a solution that will benefit your business. Going back to pen and paper is not the way to get to efficiency and scalability.

Match Your Pain Points To Product Features

Once you've made a list of your top pain points, you need to find solutions that can solve them. There are a few ways to quickly determine if a product is going to be a good fit for you. Below are just a few ways to shop more effectively:



Just Ask

It might sound silly but the easiest way to determine if a product is a right fit is to simply ask the vendor. Most vendors will make it easy to request a demonstration of their product with a live person. If not, look for a toll-free phone number on their website and request a demonstration with a live person. Instead of spending hours trying to figure out if a product is going to be a good fit, take ten minutes and have them show you how their product would solve your top pain points.



Consult Directories

Independent software directories such as Software Advice and Capterra can be very helpful in navigating to the right product for your business. These directories allow you to filter through a vast list of vendors to find exactly what you need. Most directories let you select the features you need from a list of options. Then they will produce a list of vendors that are a good match. From there, you can request a demo or give the vendor a call.



Do-It-Yourself Research

If you have the time and prefer researching on your own, then you can simply refer to a product's website. Look for a product "tour" and "features" pages. Most companies will also offer a free trial or a complimentary demonstration with a live person. Take advantage of that if you find a solution that could be a fit.

Choosing Field Service Software

Vetting Solutions

Choosing the right field service software is like choosing the right business partner. You always want to consider things such as stability, security and reliability. There is nothing worse than using a software product in your day-to-day operations and then one day getting an email that your vendor is closing shop. Here are a few questions that will help you vet potential software solutions:



How Long Have You Been In Business?

What to look for: At least 5 years.
Why? The typical technology startup fails within 5 years. Look for vendors that have passed this threshold. Vendors that are just starting up are often still trying to figure out the best features and functionality for their customers. It takes years to accomplish this in software.



What Do Customers Say About The Product?

What to look for: Customer testimonials. Dozens of them. You should Google the company's name and add the keyword "reviews" to the end of the search term (ie, "Software XYZ reviews"). You are looking for real customer testimonials, and read the 1 star reviews as well as the 5 star reviews. A solid company will have a combination of positive and negative reviews, but the positives will outweigh the negatives. Be cautious of vendors that only have 5 star reviews, as it could be employees at the company writing the reviews to improve their profile.



Do You Have Strong Financial Backing?

What to look for: Strong customer revenues. Ask them how many customers they have and how much they charge. Do the math to see if they are generating healthy revenue. Look for financial backing from a well-established investor. You want to make sure the company is well capitalized for the future so they don't unexpectedly close up shop and leave you high and dry.



What Kind Of Experience Does Your Management Team Have?

What to look for: A team of experts with proven experience. Almost anybody can launch a fly-by-night software company with little substance. You're looking for a management team with a proven track record in engineering, security and business. Where did the management team work previously? How many successful software projects have they completed? Who were their major customers in the past?



How Is My Data Secured and Backed Up?

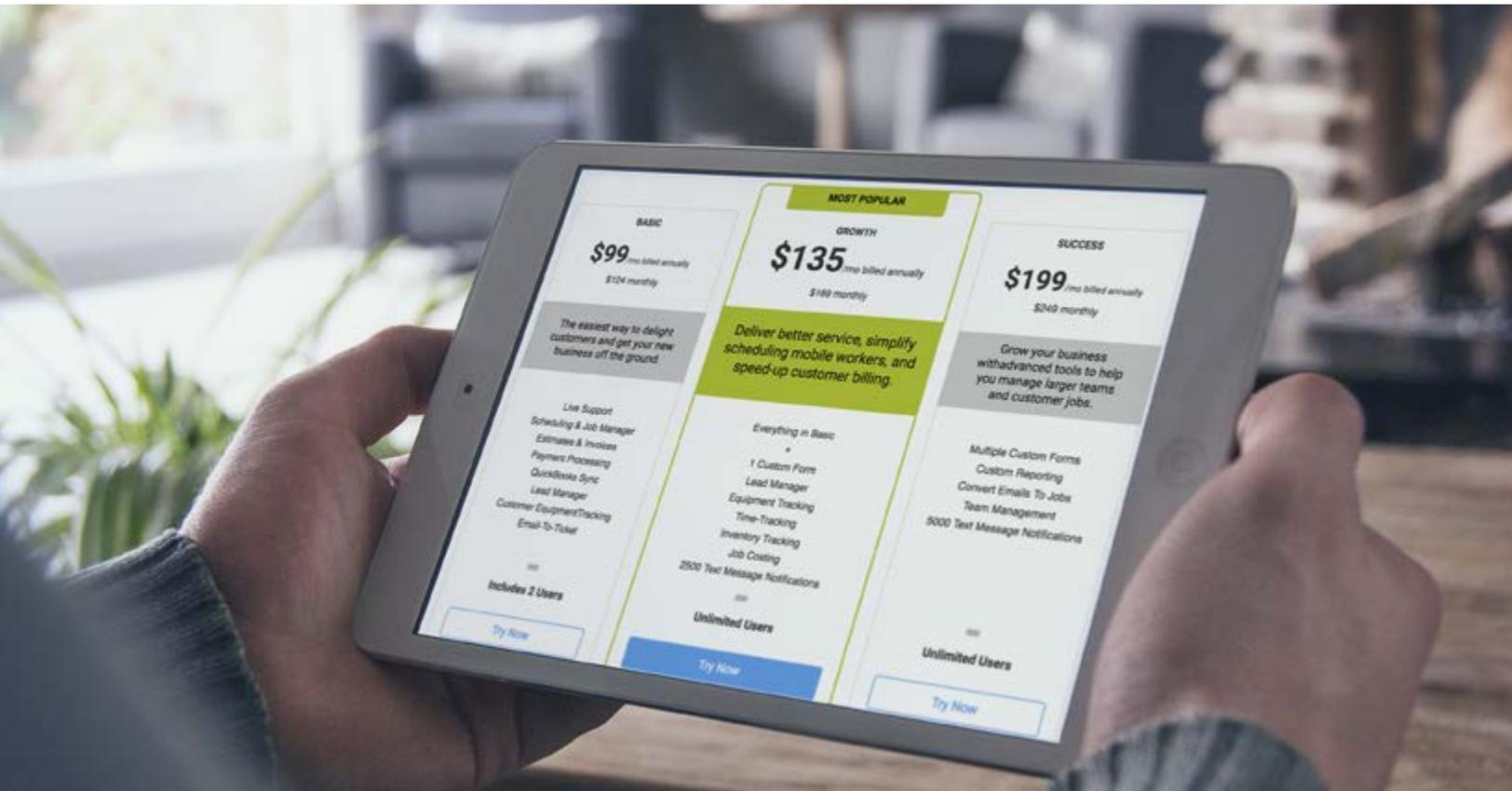
What to look for: Your want the best for your business and your customers, so you should be looking for the same level of security offered by online banking institutions. At a minimum the vendor should be using 256-bit data encryption. Customer data backups should be performed daily at a minimum. Also, look for a software uptime guarantee of at least 99%.



What Kind Of Support Do You Offer?

What to look for: Toll-free phone numbers, live chats, email and online support. The more support systems a vendor has to offer the better. Many vendors hide behind a firewall making it difficult to reach a "live" person for help. As a test, you should try reaching a live person for help during the sales process. If your support before the sale is poor you can assume that the support after the sale will be worse.

Choosing Field Service Software



Pricing Expectations

Prices for cloud-based field service software packages range from \$25 per month to \$25,000 per month depending on your needs, the features included and desired level of support. Prices for on-premise solutions generally start around \$5,000 for the installation including hardware, with additional licenses to be purchased annually for close to the original purchase price of the first year's license.

Why is there such a wide range in pricing? Generally speaking, the price points represent the size of the business the software services. For small to medium-sized businesses you can expect to spend somewhere in the lower range. For enterprise businesses with more complex needs you can expect to spend in the upper range.

Using Field Service Software

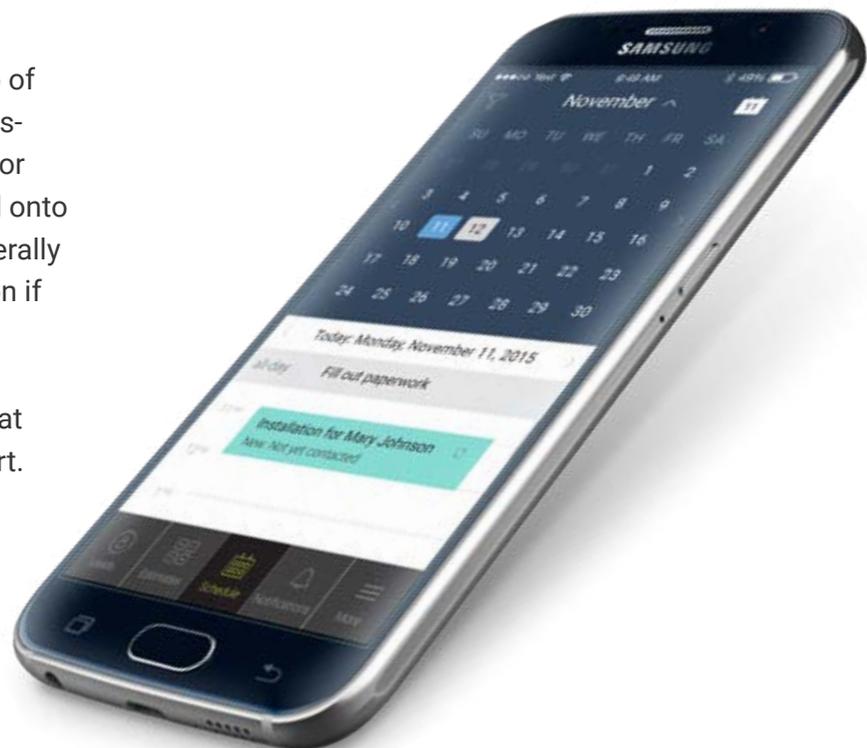
Migrating Your Business Onto Field Service Software

Getting started with any field service software is going to require a shift in the way you think about your business and the way you operate. More importantly, it is going to require that your entire team be on board. Most new buyers of field service software find it hard to grasp the fact that what worked in the past might not be what works best in the future. You and your entire team must keep an open mind that there will be some process changes. These changes are for the better; to help your business grow and become more efficient.

So how do you navigate through these process changes? How do you know what is best moving forward when all you know is the past? The software provider you choose should be well-equipped to help you manage the migration. In recent years, the best software vendors have realized the importance of establishing a group of in-house “customer success” professionals. This group is responsible for helping your business get migrated onto their system seamlessly. They generally handle tasks such as data migration if applicable, integrations with other systems like accounting software, training your team, and ensuring that you have access to ongoing support.

Success Requires Flexibility and Persistence

New technology can be scary and the urge to revert to the old ways is all too common. Most business find change challenging and migrating to technology takes discipline and a focus on the positive outcomes. There’s always going to be one employee or field worker who complains that the new technology isn’t working. The most important thing to keep in mind is that once you get past the initial hurdle, your effort will pay off in the long run. Technology, by nature, is meant to help you move forward. So when you get the urge to quit or revert, take a deep breath and refocus your efforts knowing that in the end it will be worth it many times over.



FINAL THOUGHTS

Field service management software isn't a good fit for every business, but for most organizations with a distributed workforce it is an absolute must for efficiency and scalability. This buyer's guide was designed to help you think through the most important considerations when it comes to making the switch to field service software. More importantly, this guide has armed you with some powerful knowledge to help you through the buying process. With the right knowledge and the right attitude, you'll be best equipped to make the right decision for your company.

mHelpDesk is a mobile office management software that helps you spend less time organizing your business and more time perfecting your craft. Over 10,000 customers rely on mHelpDesk to run their field service businesses.

Learn more at mhelpdesk.com

