HCLTech | Supercharging Progress™

# **Your guide** to quickly driving utilization and profits

Downloadable eBook

Why so many field service organizations are now looking to Microsoft's **Dynamics 365 Field Service**

As your field service operations grow, the matrix required to match jobs to your people, equipment and facilities can quickly spiral out of control. Dispatchers can't balance all the variables when they are tracking resources through multiple spreadsheets or disconnected systems.

Until recently, there was no easy solution—complicated ERP add-ons are costly and require hundreds of hours to implement. Which is why so many field service organizations are now looking to Microsoft's Dynamics 365 Field Service and Resource Scheduling Optimization (RSO) to quickly transform their operations. Robust, data-driven automation can be deployed to any type of field or customer service team—to address service challenges immediately and take advantage of deep data analysis to refine operations.

In this eBook, we'll explain how organizations like yours are using Field Service and RSO to automate the allocation and scheduling of resources. We'll show you how they align and optimize resources across variables— like travel distance, working hours, skill sets, priority, SLAs and more. As a bonus, we'll give you insight into the next generation of field service functionality that can further transform the way your people work.
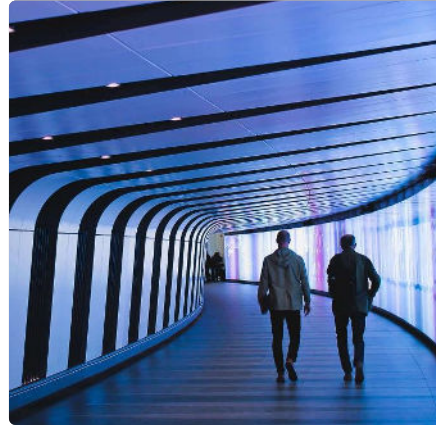
Automate scheduling to optimize resources

Service calls are a direct reflection of the value you place on customer service. And customers don't like it when field technicians are scheduled to provide repair or maintenance services but don't have the right information, expertise or tools to complete the work.

In addition, the costs of wasted time and resources will hurt your company's bottom line when multiple trips are required to make repairs that could have been done on the first call.

Optimize resources drive results

Field Service and RSO assignments are made intelligently. Computations of optimal assignments are defined based on the applicable factors for your organization. Dispatching the right technician at the right time with the right skills delivers:

Improved first-time fix rates and completion of more service calls per technician
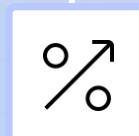
Better customer service with accurate arrival time notifications

Reduced travel time, mileage, and vehicle wear and tear

More upsell and cross-sell opportunities

Informed techs, with complete account and equipment history

Digital transformation comes to **Field Service**

The digital age is providing new ways to address traditional challenges. Field technicians, once isolated and working on their own, can now stay connected to the office and the information they need like never before.

In the following pages, we'll show you some of the exciting digital breakthroughs that are transforming field service, including:

1 IoT preventive maintenance	**3** Proactive customer service
2 Mixed reality technical support	**4** Digital twin predictive models

Empower dispatchers to act dynamically

For most field service organizations, the dispatcher's job is part data-backed and part guesswork. Dispatchers need to sort through multiple spreadsheets and applications to match technicians with service calls. Without visibility into details of the service request, they "hope" to send the best tech for the job.

Optimal assessments

You can empower dispatchers to manage more resources more effectively with Microsoft Dynamics 365 Field Service and RSO. Assignments are automatically calculated based on centralized data for technicians and other resources required for each service call. Computations of optimal assignments are defined based on the applicable factors for your organization, which could include:

|	
Resource availability	Required skills and equipment
Promised time windows	Geographic territory

Focus on exceptions

Dispatchers use visual drag-and-drop dashboards to monitor assignments and efficiently oversee a larger pool of resources. With less time spent scheduling, dispatchers can focus more time on exceptions to quickly resolve unanticipated conflicts and reduce customer impacts.

Increase customer satisfaction

With less time spent manually developing schedules, dispatchers can spend more time focused on customer service. Empowered dispatchers set the stage for a positive service experience, so technicians are welcomed when they arrive on site—rather than getting an earful about bad service.

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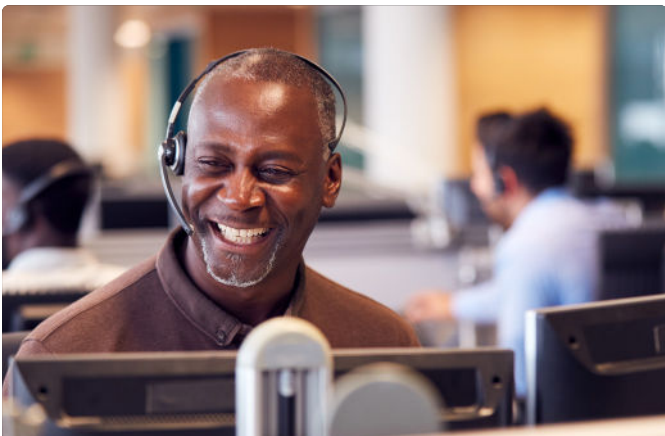
IoT preventive maintenance

The IoT (Internet of Things) is the network of sensors embedded in equipment and machinery that collect data on activity and performance. Through Microsoft Dynamics 365 Connected Field Service, organizations use IoT data to provide proactive service through the combination of diagnostics, scheduling, asset maintenance and inventory management. Connected Field Service can control costs by:

Reducing
machine downtime with early intervention

Resolving
issues remotely

Dispatching
technicians with the right expertise, availability and proximity

Connect technicians to essential information

Your service is only as good as your people. Attracting and retaining the best technicians is critical to the success of your field service operations. Those technicians expect to use modern applications to provide them the information they need to provide great service.

Increase productivity and job satisfaction

By automating your field service operations with Dynamics 365 Field Service, you provide enterprise-level support to your team. They go on service calls with a clear understanding of the customer, the target machinery and the work to be done.

Communication tools enhance collaboration between dispatchers, field technicians, customers and other stakeholders. Through their mobile devices they can:

- Access work orders, customer data and asset information
- Review their list of appointments, plus driving directions to each location
- Capture signatures, photos, videos and voice notes
- Locate product information and guided repair instructions
- Check on the tools and parts they need, as well as how to use them in real work situations

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From the Global Calendar, you can view where each service technician is and what job they're on. That helps other people planning, so if they need to use a particular technician, they know how far out they'll be scheduled and they don't have to wait for someone to get back to them. They already know where it is by that map and by that calendar."

Meredith Erwin
Sales Operations Coordinator | National Oilwell Varco

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Mixed reality technical support

Mixed reality is the blending of the physical and digital worlds by leveraging virtual and augmented reality. By digitizing information and delivering it in the context of the physical world, mixed reality enhances your field service technician's ability to create, problem solve and collaborate.

For example, Dynamics 365 Remote Assist enables distributed technicians to collaborate on in-field challenges in real-time. On-site technicians can solve problems with the help of remote experts—no need to reschedule a service call or send someone else. Remote Assist allows growing organizations to leverage experienced workers to support newly onboarded technicians.

Improve service profitability

As the number of work orders increases in your field service organization, so do the costs associated with performing the jobs. In addition to direct labor costs, there are the administrative costs to maintain customer service and operational costs like fuel and inventory.

Automation cuts through complexity

Through automation, your organization can take tighter control of each of those costs. Resource assignments are made through behind-the-scenes computations to optimize utilization based on the applicable factors for your organization. Dynamics 365 Field Service plus RSO allows you to do more with existing resources and build profits through:

- **Predictable service that increases customer satisfaction**

- **Support for administration staff**

- **Better visibility into customer warranties, increasing upsell and cross-sell opportunities**

- **Efficient scheduling to reduce overtime, mileage and fuel costs**

- **Automatic scheduling that minimizes travel time and maximizes utilization**

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Proactive customer service

Through IoT sensors and predictive service models based on artificial intelligence (AI), you can detect and resolve issues before they escalate. You'll be notifying customers proactively of potential issues and even intervening to resolve those issues remotely.

Using the Dynamics 365 Connected Field Service platform, your organization can create surveys to monitor customer satisfaction and identify opportunities for additional work needs. Technicians and customer service agents can use the information from surveys to offer solutions that are customized to meet individual customer needs.

Prepare to scale operations

Every company experiencing growth risks a decline in customer service levels as the complexity of resource coordination increases. Whether your organization is growing organically or through a merger/acquisition, you need standardized processes and communication channels to maintain customer and employee satisfaction.

Streamline processes and communication for connected teams

Dynamics 365 Field Service provides the tools to automate and streamline processes, while facilitating seamless, friction-free communication across the field service team. Efficient scheduling and service delivery reduce the hassles of data entry and administration so they can focus on productive work.

Through connected data and standardized processes, Dynamics 365 Field Service empowers your team to:

- Triage calls and dispatch technicians automatically to ensure a unified workflow
- Manage asset history to better inform technicians on the tools, equipment and parts needed for each job
- Dispatch the technician with the right experience at the right time to the right location
- Proactively communicate to customers to provide personalized service

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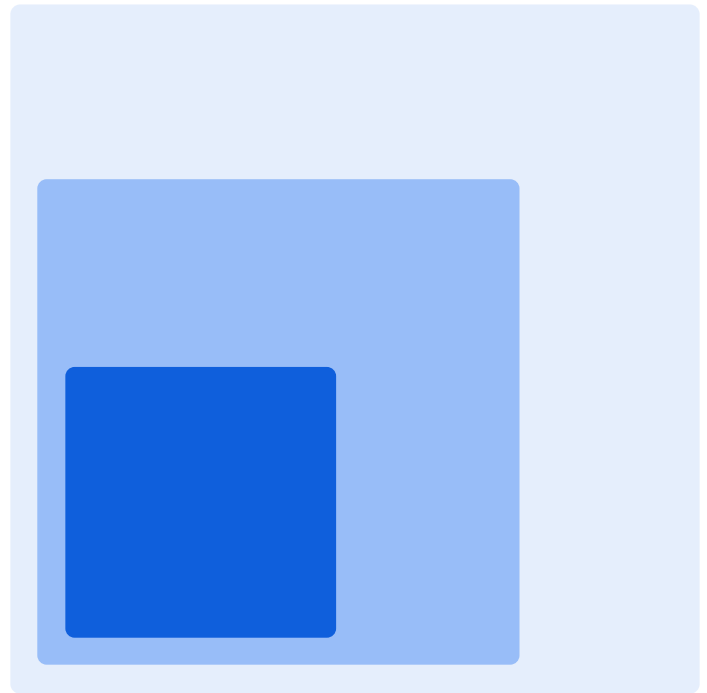
The largest benefit of having the field service functionality is our ability to work inside of our business groups. Not only can our commercial and sales teams have the same data that's being exchanged with our service and aftermarket group, we can collaborate together and focus on customer solutions."

Chris Rossman
Director of Service and Aftermarket Operations, National Oilwell Varco

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Digital twin predictive models

Enabled through the revolution of IoT, the digital twin has emerged as a valuable tool for field service organizations. A digital twin is a virtual model of a process, product or service.

Pairing the virtual and physical worlds allows data analysis and proactive monitoring of systems. Organizations can identify and head off problems before they even occur, prevent downtime, develop new opportunities and even plan for the future by using simulations.

Digital twin benefits

By collecting data through the digital twin of an asset or group of assets, your field service team can monitor remotely. By moving from reactive to proactive monitoring, the digital twin enables your organization to:

Correctly identify problems remotely to improve first-time fix rates

Predict and schedule maintenance before equipment fails

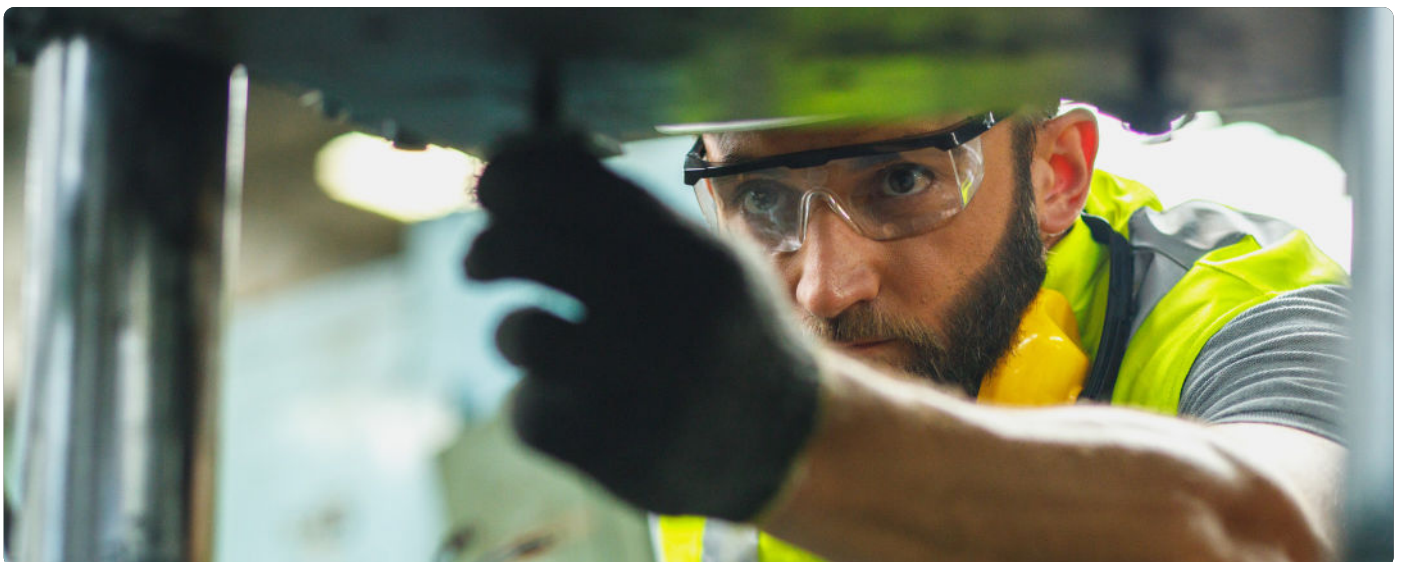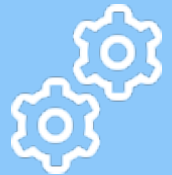**Predict** the remaining useful life of equipment

Identify product weaknesses for future improvements

40%
Reduction
in reactive maintenance

Source link

This was achieved in less than one year by companies using a **digital twin.**

Use analytics to improve operations

Most field service organizations have limited visibility into their field operations. Without comprehensive data on resource and work order performance, customer-facing service-level agreements (SLAs) and internal labor guidelines are based on guesses and gut feelings.

Data-driven decisions

Using Microsoft's Power Platform you can put that data to work, getting new insight into customer experiences, resource utilization, cost analysis and more. Using the up-to-the-minute analytics, your team can gain a better understanding and improve key metrics for your field service organization, like:

How long a specific job should take or the productivity of any given field resource

Profitability of warranties and service contracts

How different approaches to upsell and cross-sell opportunities are performing

Comparisons of profitability and growth for each service line

Trends in customer satisfaction

Optimize field service with HCLTech

Field service management is about more than just having the right tools for the job. It's about being able to connect with your most important asset: your customers. With Dynamics 365 and field service management solutions from HCLTech, you can create a customer service story that spans multiple channels, maximizes your employees' efficiency and exceeds customer expectations.

Let us show you how to:

Increase service revenue

Prevent warranty leakage, enter new markets, maximize technician productivity, increase upsell/cross-sell opportunities and speed up cash flow.

Increase employee productivity and satisfaction

Automate your field service operations to increase field utilization, eliminate duplicate data and increase employee satisfaction.

Reduce cost

Reduce overstocking costs, improve parts visibility and workforce utilization, reduce administrative overhead and increase process efficiencies.

Increase customer and partner satisfaction

Keep your customers and partners happy by opening up multi-channel communication lines, meeting or exceeding SLAs and providing proactive vs. reactive service.

Our people take SERVICE to the next level, providing the expertise and capabilities needed for end-to-end implementations of Microsoft Business Applications, designed to meet your unique field service requirements. We offer several different technical support programs to ensure you get started on the right foot with the knowledge and technical expertise at your fingertips to succeed far into the future.

Connect with our field service experts today!

Contact now

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