

Whitepaper

#Creating A Customer

First Approach in Field Operations





Creating A Customer-First Approach in Field Operations

The field service industry has long been plagued by a persistent set of customer complaints.

Many of these revolve around appointment scheduling problems, missed appointments, long appointment time-spans, failures in first time fixes and unsuccessful appointments that necessitate return visits.

Service providers should no longer expect their customers to tolerate these issues. The contemporary customer prioritizes their experience, service value, and brand ethics. **PWC** estimates that around 59% of customers will leave after several poor experiences and 17% will leave after just one.

Vanguard organizations are pulling ahead with a customer-first approach. This approach holds the customer's needs as a priority and considers them at every step.

KPMG lists six pillars of excellent brand experience as integrity, problem resolution, expectation management, client empathy, personalization, along with respecting the customer's time and effort. Companies that excel in each area outperform their competition and earn client loyalty.

When brought into field services, these resolve into a few critical areas: increasing client autonomy, improving information, anticipating their needs, and improving the service visit itself.



Increase Autonomy

The autonomous customer interacts on their own terms. They want self-service options, information on-demand and their choice in channel.

If one provider forces them to go through an automated phone system for information, they will find one who can provide it instantly via a mobile app.

The service provider who requires customers to call in to reschedule an appointment will experience higher attrition rates than the one with nimble, self-scheduling capabilities.

Field services must enable their customers to control their own service experience, while maintaining a human touch.

The field service organization must operate seamlessly and synchronously to deliver this. Barriers caused by siloed information and disparate systems must be eliminated.

Autonomy is empowerment. Empowered customers have fewer complaints and experience higher satisfaction.



Inform Them

Lack of communication is at the root of most field service complaints. The uncertainty caused by leaving clients in the dark, creates tension, frustration, distrust, and resentment.

Long wait times, operational delays, and rescheduling issues don't have to result in client tension. Acknowledging problems demonstrates integrity and begins the path to resolution.

The customer-first organisation freely shares information, sets expectations in advance, checks in at every step, and actively manages any issues.

Business intelligence such as real-time service analytics, time estimates, and technician status shouldn't be reserved for internal use only. Offering clients this level of insight invites them in, as a valued partner.

The contemporary client is both autonomous and digitally savvy. They need to access pertinent information on-demand and receive it through a variety of channels.

Email, voice calls, and SMS notifications should be standard offerings, along with online information portals.



Anticipate Their Needs

Proactive service is the new standard. The organization that understands customer needs in advance can eliminate lengthy wait times, minimize equipment downtime, and better manage inventory.

Field services were early adopters of IoT for remote device monitoring. With the emergence of new AI capabilities and machine learning models, this raw data can be transformed into information that's valuable to every business area.

Some organizations choose to leave their service at detecting, then fixing problems. The customer-first mindset requires us to think beyond this and consider their needs at every step. IoT information should be integrated with the intent of improving their experience.

Inventory and workforce management are two areas that directly impact the customer.

Clients shouldn't be left to wait for parts post-breakdown. Customer-first inventory management actively plans for upcoming customer needs when sourcing parts and equipment.

Customer-first workforce management ensures that the right engineers are available when needed. This ensures that customers can receive timely service.

The new mindset anticipates their needs, prepares operations, then gently nudges them to schedule service.



The Improved Service Visit

The field visit is often the client's only in-person interaction with the organization. Field services are infamous for wasting customer time with long appointment time spans and missed appointments.

Customers are no longer willing to tolerate these issues.

Customer friendly operations are transparent. It keeps customers fully in the loop and treats them as valued partners. This is achieved through better communication, operational visibility, and proper workforce organization.

Engineers should be given everything they need to resolve the problem in as few visits as possible. This generally requires having full work details at hand, acquiring any specialty parts in advance, and maintaining access to informational databases.

Constraints should be put in place to limit the damage any rogue personnel can do. Operations can incorporate checklists to ensure work quality, require geographical check-ins, and automatically deliver technician information to the client.

Leading organizations are those who consider more than their immediate bottom-line. These service providers are making full use of these new capabilities and delivering exceptional care. They make their service convenient, seamless, and unobtrusive for customers.

Organizations who value their customers, must work this mindset into every facet of operations. Creating the best customer experiences possible isn't an option, it's the new status quo.



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