

## What Have We Learned?

By Roger Henson, Southwest Training and Consulting

In my business classes and seminars I always talk about keeping your résumé up to date — the point being that every year there should be something that needs updating. You learned a new skill, completed a course, perhaps made a significant accomplishment. What makes you worth more to your employer and/or yourself? And, if there is nothing to add, why not? No plan, procrastination, stuff just got in the way. What have you learned? Why is it important? What will you do differently?

In 2017 there have been many lessons we may have learned by watching and hearing about the once-secret lives of movers and shakers. Are we fortunate to not have in-depth scrutiny applied to our lives or organizations? Do we know of issues within our organizations that we need to view with a new set of eyes or from a new perspective? Sometimes we learn, or become knowledgeable, but do not apply the lessons learned because we are too busy or it does not seem important. Today is probably not the time to ignore or sweep under the rug what may seem like small issues or rumors. With everything else that is on our plates, we may have to find time for one more item. Thankfully, we have technology to reduce the time we spend on some of the more mundane or rote activities.

These are not easy times, or — as someone else commented — these are weird times. Internationally, nationally and locally something is coming to light that wasn't expected. And, the "why" questions seem to outweigh all the rest of the questions. The one area that seems to have been on a steady upward track has been the stock market and the success of most businesses. I recently discovered that Amazon has created a new business problem for the post office in many places, especially remote areas that do not have home delivery. The boxes keep coming, but the recipients don't pick them up on a daily basis, creating a storage problem. The opportunities are still coming in the form of new problems to be resolved. What problem will your organization choose to resolve in 2018 based on a problem you discovered in 2017?

*So this is Christmas and what have you done,  
Another year over, a new one just begun*

*And so this is Christmas, I hope you have fun  
The near and the dear ones, the old and the young*

*A very merry Christmas and a happy new year  
Let's hope it's a good one without any fears*

*And so this is Christmas for weak and for strong  
The rich and the poor ones, the road is so long*

*And so happy Christmas for black and for white  
For yellow and red ones let's stop all the fights*

*A very merry Christmas and a happy new year  
Let's hope it's a good one without any fear*

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# Shorten Service Windows and Provide Better Customer Service with Mobile and Location-based Technologies

Source: *Field Technologies Magazine*

## Telogis – A Verizon Company

**All mobile service professionals work toward two main goals: making service more predictive and more proactive.**

The current business model relies heavily on break-fix occurrences, where a failure has occurred and the customer engagement is entirely reactive. By that time, the customer experience has started out negatively.

The not-too-distant future will bring us HVAC and other building components/appliances that talk directly to service providers who can address mechanical issues before they grow into bigger failures (much like heavy equipment and vehicle fleet managers do today). That level of proactivity is near as everything becomes more connected.

In the meantime, service providers need to focus on shortening the service cycle and providing the greatest possible customer satisfaction – and mobile technologies help achieve that.

## Executive Summary

Almost all field service techs have cell phones, and 80 to 90 percent of them use smartphones. This puts convenient Internet access and a powerful computing device in the field. Smartphones equipped with advanced mobile/ location intelligence apps help workers in the field be more efficient and shorten that window from event/customer request to resolution. This makes customers happier and lowers the total cost of service (more work done each day). In this eBook, we'll cover a few of the ways this mobile technology is helping improve customer service satisfaction and costs.

## Sharing Information/Filing Resources

Smartphones are for more than Facebook and Instagram – they enable real-time research and information sharing with coworkers and back-office personnel.

This could be as simple as a web search or communicating through the text messaging capabilities of the phone, or as advanced as the incorporation of a work order management app that provides access to important documents. This can include paperless forms, service agreements, customer profiles, instructional material, how-to videos or graphics, parts catalogs – anything that will help the field tech do their job better.

It essentially places the entire intelligence of the organization out on that service call – making the answer to almost any question a call, IM or document search away.

**Today's professional navigation and routing applications take into account real-time feeds of traffic and weather information.**

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# Field Service Shared Struggles

Source: *Field Technologies Magazine*

They say misery loves company, and while I wouldn't go so far as to say these challenges are causing field service leaders misery, I would say they are causing their fair share of stress and probably some sleepless nights. So take solace in the fact that you aren't alone in your struggles — your peers are up against the same challenges you are, and are alongside you in the trenches looking for ways to conquer them.

What strikes me most about the challenges field service organizations are facing today is how interconnected they are. When you read through the top challenges of our survey respondents, you begin to think about how one really ties in with the next. This in and of itself is a challenge because it can make it difficult for service organizations to determine a strategy for tackling one problem at a time and then identify the best solution for doing so. However, it is important to get to a point where you can evaluate both the interconnectedness and the singular impact of these different areas because, while related, different factors can influence each.

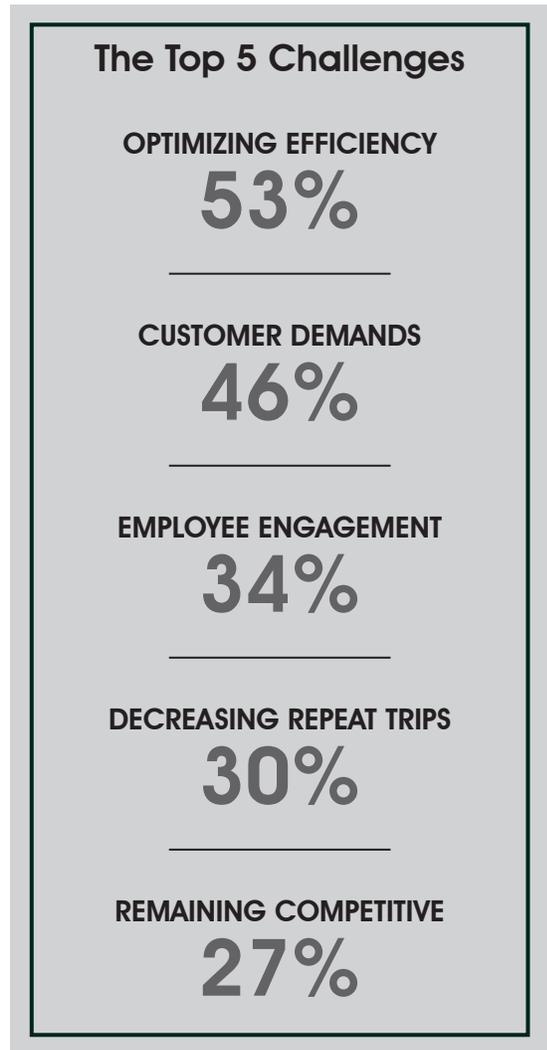
The field service leaders who took our survey were asked to rank some of their top challenges, and the number one challenge, shared by 53 percent of respondents, is ensuring mobile workers are at optimal efficiency/productivity. I think as long as I've been at Field Technologies that has been the number one challenge — and I think it remains so because it is an issue that can be detrimental to the service organization. It is also a pain point that bleeds into a number of other challenges, including the second biggest challenge on our respondents' lists — meeting growing customer demands/expectations (at 46 percent).

These top two challenges really illustrate the interrelatedness of these issues. You're going to have a very difficult time making your customers happy if your field workforce isn't operating at optimal efficiency and productivity. That said, again, you need to be able to examine these issues alone as well as in terms of how they intersect. Efficiency and productivity can make customers happy (through things like being on time for appointments, accomplishing first-time fix, and so on), but there are a number of other factors that will play in to meeting your customers' expectations (such as the technician's demeanor and knowledge while on-site, how information is shared with the customer, the ability to self-service, etc.).

The fact that meeting growing customer demands/expectations is the second biggest challenge makes sense based on what we've heard from field service organizations all year — that they are struggling to keep up with what their customers want and how they want it. The need and desire to better understand, incorporate, and meet the customers' expectations has been a major theme in field service this year. As we approach 2018, this focus area will only grow in importance.

Next on our respondents' lists is employee engagement, training, and incentivizing, which 34 percent of respondents list as a challenge. As field service business models change (from reactive to predictive, from break-fix to contractual, etc.) to modernize and better meet customers' needs, organizations struggle with how to successfully bring their employees on board, and how to teach them to master the new ways of business. This issue again factors in to meeting customer demands, because a disengaged or frustrated employee isn't going to help you accomplish that goal. It is also compounded

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## Shorten Service Windows and Provide Better Customer Service with Mobile and Location-based Technologies

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This can provide benefits as simple as avoiding major congestion or accidents and routing to the next job in the fastest way possible, or it can help the technician reorder their day based on the weather. As an example, they can plan their day so that all indoor jobs are planned and routed in the morning while it’s raining, and all outdoor jobs are planned and routed in the afternoon when it’s dry.

**Work order management applications can deliver new plans and jobs directly to the field service tech without requiring them to return to the office.**

The jobs can be prioritized and routed based on direction from the home office and delivered directly to the app. And not all workers/vehicles return to the home office at the end of each day – this technology allows for a full plan to be disseminated without requiring that extra time and travel – allowing work to get done faster with less wear and tear on vehicles.

**Worker Progress — Much of customer service satisfaction is based on expediency.**

No one likes hearing that help will arrive in a window between noon and 5:00 PM. Location-based fleet management technology can notify the home office when a technician has left one job and is on their way to the next, which then allows them to notify the customer that a technician is on their way and their ETA. Similarly, work order management technology allows those technicians to update their progress throughout the day, and provides insight into how they are performing to the plan for the day. This empowers the back office with information to keep customers up to date for when they can expect service.

### The Future

**These are just a few ways that current mobile and location-based technologies help shorten the service window and help businesses provide better service to their customers.**

This technology is evolving – quickly – and service-oriented companies should take the time to investigate how these technologies will help their business now, and how they will revolutionize customer service in the years to come.

Telogis  
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# 2018 Events

*Note: Dates and locations are subject to change.*

## Field Service Medical 2018

February 26-28, 2018, Hilton La Jolla – Torrey Pines, CA  
www.FieldServiceMedical.com

## Field Service USA 2018

April 17-20, 2018, JW Marriott Desert Springs Resort & Spa – Palm Springs, CA  
www.fieldserviceusa.com

## Field Service East 2018

September 25-27, 2018 – Omni Amelia Island Plantation Resort – Florida  
www.fieldserviceeast.com

## NASM 2018 Business / Board Meeting Schedule\*:

Business/Board meetings are monthly teleconferences (**1-800-630-9030, pass code 4616060#**), unless otherwise noted. Typical meeting dates are scheduled for the fourth Tuesday of each month, starting at 10:00 a.m. central.

**January 23, 2018** . . . . . 10:00 a.m. (cst)

**February 27, 2018** . . . . . 10:00 a.m. (cst)

**March 27, 2018** . . . . . 10:00 a.m. (cdt)

**April 24, 2018** . . . . . 10:00 a.m. (cdt)

\* With some exceptions, there will be face-to-face meetings that coincide with other NASM events. The face-to-face meetings will have available phone-in to the teleconference for those unable to attend.

# What Have We Learned?

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*And so this is Christmas and what have we done  
Another year over; a new one just begun*

— John Lennon

So hug your friends, kiss your family and tell the people in your world that you love them and care for them. Let us be the change we want to see in our world and in other people.

Roger Henson  
RHensonDFW@aol.com

## Articles for NASM Newsletter

NASM publishes the newsletter quarterly.

**Please submit articles/ information to Ken Cook, Ken Cook Co. (kenc@kencook.com).**

### Deadlines are:

November 15

for the December issue

February 15

for the March issue

May 15

for the June issue

August 15

for the September issue

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## What's on Your Reading List

Please take a moment to think about what you've read lately that would be of interest to your fellow NASM members. Be sure to include the complete title, author's name, a brief book overview and where it's available. Send your recommendations to [kenc@kencook.com](mailto:kenc@kencook.com) and we'll include them in subsequent newsletters.

# Field Service Shared Struggles

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by the fact that many field technicians are reaching retirement age. As this happens, field service organizations are facing recruitment issues along with the need to determine how to effectively manage/train/motivate/incentivize a disparate workforce of older technicians and their millennial replacements simultaneously.

Eliminating repeat trips (i.e., improving first-time fix) is a challenge for 30 percent of our survey respondents, which again ties in with both the efficiency/productivity and customer expectation challenges. This metric, however, needs to be able to be examined on its own because many issues can factor in to the reason a first-time fix isn't achieved.

Twenty-seven percent of respondents cite remaining competitive in their industry as a big challenge, which makes sense as the industry as a whole is modernizing to address customer demands. This modernization includes the shift in perception of service as a strategic initiative, the move to create new streams of service revenue, and the use of technologies to better meet customer needs.

Finally, 25.5 percent of survey respondents are having issues with standardizing processes/technology among multiple operating locations. Not only is the standardization of processes and technologies difficult, when it's combined with the transformation of the business model as well, this challenge is significantly compounded.

## Field Service Leaders Share Their Challenges



**“My three biggest challenges are dealing with legacy systems, managing data, and balancing multiple priorities.”**

*– Johnny Johnston,  
National Grid*

I asked a handful of field service leaders to share some anecdotal perspective with us for this issue so that we can see how it stacks up against the survey data. The first is Jack Rijnenberg, director of global customer service at Markem-Imaje (Markem-Imaje is a Dover Corporation company that specializes in printing and marking technology. The company operates in 30 countries direct, employs more than 3,000, and has a team of 700 field technicians). “Our company’s current biggest challenges are improving our service response times, hitting our service profit margin targets, and standardizing our processes and technologies across 30 countries,” Rijnenberg shares. I interviewed Rijnenberg not long ago about Markem-Imaje’s global standardization, and thinking about that degree of a process and technology transformation is really intense.

Chris Smith, VP of service innovation at Otis Elevator (the world’s largest manufacturer and maintainer of people-moving products, including elevators, escalators, and moving walkways), says that “our two biggest challenges are scale

and scope. Scale because we approach change across a global team of mechanics. For instance, right now we’re deploying a common mobility platform and apps to our global team of mechanics, while continuing to maintain the 2 million units in the Otis service portfolio. Scope in the sense that our investments are about more than just mobility — it’s about new, common service tools, connectivity, and using data to service customers in an entirely new way.” What Smith is saying aligns with what I alluded to earlier — the magnitude of this type of change isn’t so much the introduction of a new technology or tool, but in the shift in mindset you’re asking of your workforce as you migrate to a brand-new way of providing service.

Johnny Johnston is the SVP of business enablement at National Grid (one of the world’s largest investor-owned energy companies). “My three biggest challenges are dealing with legacy systems, managing data, and balancing multiple priorities,” he says. The issue of juggling multiple priorities — often competing priorities — is something I hear often from field service leaders I speak with. It can be difficult to strike an appropriate balance between determining your organization’s path to innovation and growth (which can mean a bevy of projects) and keeping day-to-day operations running smoothly.

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# Transforming Field Service Through IoT

Source: Microsoft

Like everything else in the digital world, the Internet of Things (IoT) has evolved.

It's no longer just a futuristic-sounding catchphrase. It's become something businesses need to start planning for, particularly when it comes to field service. The reason? Field service management and IoT are deeply intertwined. Businesses need flexible cloud-based solutions that add, extend, and integrate technologies, with the agility to adapt and innovate.

Azure is a large, flexible, public cloud station that opens up powerful opportunities and delivers the broad range of benefits needed for businesses requiring complex global IoT and/or distributed resources. You can also empower your people and drive service excellence by leveraging the advanced capabilities of IoT, machine learning, and the connected field services platform from Microsoft.

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## Field Service Shared Struggles

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T. Scot Harnish is the senior manager of field services at FedEx Office. Harnish echoes Johnston's woes of trying to do too much at once. "Some of the struggles I'm facing are obtaining funding for projects, gaining cross-department support for implementations, and finding time to accomplish all I have on my plate," he says.

Kevin Chlopecki is the VP of service operations for Konica Minolta Healthcare Americas (Konica Minolta, Inc., is a large Japanese technology company headquartered in Tokyo, serving over 150 countries worldwide. Konica Minolta Healthcare Americas, Inc., headquartered in Wayne, NJ, is focused on imaging technologies including digital radiography, ultrasound, healthcare IT, and service solutions). "My biggest struggle currently is dealing with the lack of single-source, cost-effective technology solutions," he says. For field service leaders already taxed with trying to accomplish so much, having to piece together point solutions to accomplish their objectives can be very frustrating.

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Election Results April 28, 2017

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