

# ServiceNow Field Service Management

## The field service challenge

Service quality is becoming more critical as organizations work to differentiate themselves from the competition. That extends to field service, whether that involves sending a technician to install or fix an asset or scheduling an on-site worker, like an insurance adjuster or home health aide. Unfortunately, customer service or the help desk isn't always aligned with field service workers, resulting in multiple service visits, extra customer contacts, and increased costs.

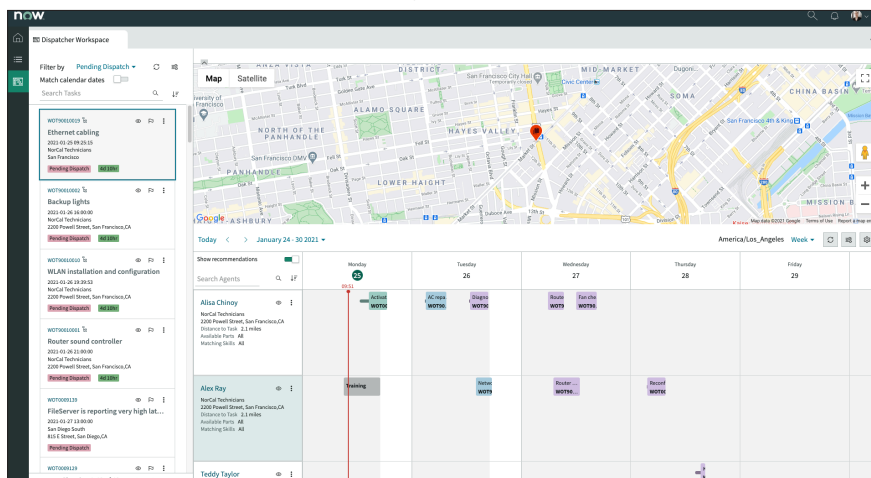
Without a good connection to the customer and understanding of their assets and history, your mobile workforce may not be prepared with the right skills or parts for the task. Limited visibility can also lead to missed maintenance and costly, unplanned break-fix work. Customers are inconvenienced by multiple visits and feel they're out of the loop. In addition, safety is a key concern for everyone, and it can be hard to document compliance with safety protocols or ensure workers have access to proper safety equipment.

Meanwhile, management has little insight into field service performance and how to improve productivity. The result is a poor customer or employee experience, potential negative impact on customer loyalty and company revenue, and an inefficient use of time for customers and workers.

## The ServiceNow solution

ServiceNow® Field Service Management helps you manage location-based work efficiently and safely. It works seamlessly with ServiceNow® Customer Service Management and ServiceNow® IT Service Management to connect customer service and the help desk with field service processes, or it can be used stand-alone. With Field Service Management you can:

- Complete work the first time by scheduling the most qualified worker for the task. Manual or automated scheduling considers their skills, location, parts on hand, and availability.
- Fix problems before your customers know they have them with preventive maintenance and asset management.
- Improve mobile worker efficiency to meet service level agreements with an intuitive, native mobile app for iOS or Android with work order information, directions, parts locations, knowledge base articles, and safety checklists.



Manage tasks, workers, and locations in a single screen with Dispatcher Workspace.

## Create work orders seamlessly

Integrate with ServiceNow® Connected Operations, Customer Service Management, or IT Service Management to speed resolution of issues.

## Give customers visibility

Allow customers to schedule appointments and get text message updates with worker location and arrival time.

## Plan assignments efficiently

Automate work assignment based on proximity, availability, and the parts and skills required.

## Consolidate inventory and parts management

Use ServiceNow® Asset Management as a single repository for assets in stock and inventory control.

## Optimize field work with mobile interface

Accept or reject tasks, track travel and work time, use safety questionnaires, view knowledge articles, and collect customer signatures acknowledging work completion, with or without an internet connection.

## Improve insights with reporting and dashboards

Use and customize out-of-the-box reports and dashboards for real-time understanding of utilization, capacity, customers and locations requesting work, and other metrics.

## Provide consistent and complete service through work order management

Work orders drive field service with the relevant details for every job—details which are critical to assign the right person. Work orders can be created within Field Service Management or from operations incidents in Connected Operations, Customer Service Management cases, IT Service Management incidents, problems, or changes; or Project Portfolio Management project tasks. This ensures field service workers get important information from the original request and provides visibility to those originating teams.

Create consistency for repeated tasks with work order templates. Templates define the skills, parts, descriptions, checklists, average time needed to complete a specific task, and more. They also enable creating new work orders from a service catalog or appointment booking.

## Automate work with Dynamic Scheduling and Dispatcher Workspace

Easy, efficient scheduling is one of the greatest challenges dispatchers face. Field Service Management provides flexible means to schedule and adapt on the fly to allow dispatchers to spend less time on routine scheduling and focus on exception handling.

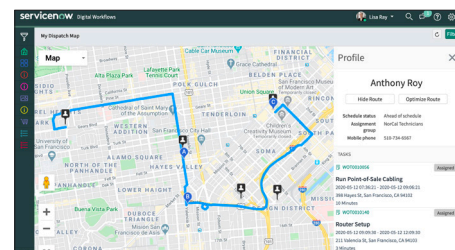
Dynamic Scheduling automatically assigns tasks to the most qualified person using a set of easily configurable rules. Scheduling can happen immediately after the work order is created or it can be triggered manually by the dispatcher. Dynamic Scheduling considers the skills and parts needed for the task, location, and whether the customer has a preferred technician. Work orders can also be reassigned automatically if someone is falling behind.

Dispatcher Workspace gives dispatchers everything they need in one place to make smart and fast scheduling decisions. Easily track tasks, schedules, maps, and SLAs in a configurable, drag-and-drop interface. Get recommendations for task assignments based on technician proximity, availability, and the specific skills and parts required. Selecting an unassigned task will prioritize eligible workers, making it easy for a dispatcher to identify the best person for the job. When a high priority assignment comes in, Dispatcher Workspace works seamlessly with Dynamic Scheduling to reschedule lower-priority work.

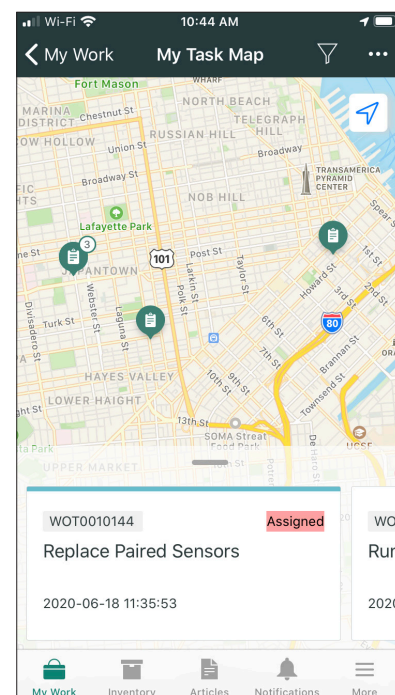
Dispatchers can also use geo-location tracking to see where workers are located and optimize their route for the day with just a click. The dispatch map enables dispatchers to view all open work order tasks to understand work distribution and to quickly identify impacted areas. Work order tasks can easily be assigned, routes optimized, and assignments changed directly from the map.

## Coordinate with third-party service contractors

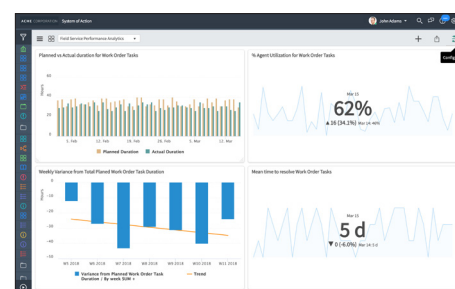
Work is being performed more often by third-party contractors as business models change, but managing the tasks assigned to them frequently involves numerous emails and phone calls. Field Service Contractor Management allows work order tasks to be assigned to a contractor instead of an internal employee. The work order is visible to the contractor's managers or dispatchers via an external portal from which the task can then be assigned to a contractor technician. The technician can also use the contractor portal to log their work progress. This means both the contractor manager/dispatcher and internal dispatcher can see the latest task status instantly without granting contractors access to your ServiceNow instance.



*Optimize field service worker routes to increase efficiency and maintain SLAs.*



*View and update work tasks in the field with the ServiceNow® Agent mobile app.*



*Gain real-time insights with reports and dashboards.*

## Maximize resource utilization

When working with third-party contractors or your own internal teams, you want them focused on the right mix of tasks as well as the right number of tasks to be efficient. For contractors, it can be even more critical to meet contracted minimums and maximums. With Field Service Capacity and Reservations Management, you can create granular capacity definitions for internal and external teams and a desired mix of task types, such as break-fix work versus maintenance.

These definitions are used by Dynamic Scheduling to automatically schedule work while adhering to these rules. Dispatchers have the power to make exceptions as needed.

## Manage calendars, time, and cost

Field service managers spend much of their time managing their team's schedules. With the team calendar, they can view tasks at a glance and drill in to make changes in real time or approve requests. Field service workers can also easily manage their calendar via mobile.

In addition, technicians can track time spent on work orders and travel to automatically fill out a timecard. They can also track expenses via mobile to ensure proper accounting.

## Empower field service workers with a native mobile application

Field Service Management includes an intuitive, native mobile interface designed for field service workers to quickly view and record information. From iOS or Android smartphones and tablets, field service workers can accept or reject tasks, track travel and work time, display tasks or parts using map views, and access their schedules.

Questionnaires are available to collect and complete necessary task details, such as safety or work completion checklists, and knowledge articles help guide workers through complex tasks. When assignments are complete, customers can acknowledge the work with a signature on the worker's mobile device and receive a work order summary by email. The mobile app also supports offline mode, allowing technicians to work without internet connectivity.

## Find available inventory and parts

Work order tasks use ServiceNow® Asset Management to provide a single repository for assets and a standard inventory control process for both asset and field service processes. Features such as threshold-based stock replenishment and procurement ensure that parts are always available, and dispatchers or field workers can easily source parts, reserve them for work tasks, and better schedule when work can be done.

## Plan maintenance and view asset history

Costly break-fix work can often be avoided by keeping up with preventive maintenance. Field Service Management leverages Asset Management to schedule maintenance automatically based on regular intervals or usage. With complete history of customer assets, technicians can make the most of each truck roll for comprehensive service visits that avoid repeat trips.

## Give customers visibility and control

Informed customers are happier customers. When customers don't know what's going on, it leads to additional calls to the contact center. In addition,

there's a risk of a customer not being on-site to let the technician in to do the work. Field Service Management gives your customers better visibility and communication options to avoid those situations.

Appointment Booking allows customers to choose the appointment time that works best for them. Create schedules for common tasks to let customers pick from the available openings via the Customer Service Portal<sup>1</sup>. Customers can move or cancel their appointments if schedules change, but preset rules determine how late appointments can be modified to avoid last-minute schedule changes.

A modern last-mile customer experience keeps your customers informed of their technician's arrival time. Customers will receive a text message when their work order is assigned and they'll receive a map link when the technician is on their way. Informed customers will be more satisfied, make fewer calls to the contact center, and know whom to expect and when.

## Improve performance through reporting and dashboards

Managers can easily customize reports and dashboards to gain real-time insight into technician utilization and capacity, and better understand customer and employee work requests and locations to pinpoint improvement opportunities. ServiceNow® Performance Analytics for Field Service Management includes key performance indicators (KPIs) and dashboards specific to field service to start providing relevant data right away.

1. Requires ServiceNow Customer Service Management

