

# A proactive approach to field service

5 priorities for implementing strong service foundations

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## What does proactive service mean to your customers?

**Proactive field service is about being one step ahead of your customers. It requires systems that meet customer needs while minimizing their efforts.**

When thinking about moving from a reactive field service model to a proactive one, most people jump to the Internet of Things (IoT), servitization, and outcome-based services. But it's important to first create an operationally-efficient foundation that benefits both customers and employees.

Although a primary goal of proactive service is to stay one step ahead of your customers' needs to help prevent issues all together, things still break. Part of proactive service includes looking at how to minimize the inconvenience to your customers when they do. This includes communication, transparency, and responsiveness.

**Moving to a more proactive field service model can help optimize costs, drive operational excellence, shorten resolution times, and help you address customer needs with speed and efficiency.**

### FOCUS ON MEETING CUSTOMERS' NEEDS AND MINIMIZING THEIR EFFORTS BY:

01

#### ANTICIPATING NEEDS

Make it easy for customers to get answers, and access information when, where, and how they want to.

02

#### GETTING AHEAD

Prevent issues from happening by getting ahead. When that's not possible, provide advance warning and accurate updates on resolution statuses.

03

#### RESOLVING QUICKLY

Be quick and effective at resolving issues to minimize downtime, customer effort, and frustration.







## Proactive field service first steps

**A shift to a proactive service model requires a focused strategy; but with limited time, budget, and resources, it's vital that you clearly define your strategic parameters and realistic goals.**

A solid strategy should take into account what's in your control and what you can influence. Consider all the human elements as well as the technological and change management implications. You don't have to do it all at once. Strategy is as much about what you don't do as what you choose to do. Take small steps, get quick wins, and learn from the process.

**When it comes to developing your strategy for providing more proactive field service, ask yourself these questions:**

?

Which initiatives will have the greatest positive impact on both your customer and field service teams?

?

Which changes will significantly improve your efficiency and effectiveness?

?

Which levers can you pull to get you to value faster?

**The answers to these questions will ensure your first steps towards proactive field service are on solid ground.**

## Prioritizing for proactive service

**Every initiative has to start somewhere. When looking to improve both operational efficiency and stakeholder experiences—while best serving the customer—you must first listen to and understand the customer.**

Think outward first when moving to a more proactive field service model and consider what the customers need, what information they want, and what type of services are most important to them. Also consider if they prefer self-serve, remote support, or in-person services where possible.

Answering these questions can position you to provide the most value to your customers and prevent you from developing systems that do not meet their needs and create complications for your field service technicians.

### WHERE DO YOU GO FROM HERE?

**We've identified these 5 steps to help you create a strong foundation for more proactive field service:**

- 01 Break down silos
- 02 Automate and optimize processes
- 03 Increase scheduling and dispatching efficiency
- 04 Maximize asset uptime
- 05 Empower customers to take action with self-service

**Let's discover how some of our ServiceNow customers successfully addressed these priorities and drove their organization forward...**



# Break down silos

## What's wrong with silos?

Silos build barriers. They slow things down, creating complexities when work needs to be simplified. Your customers get frustrated when straightforward requests take ages, when it's difficult to log issues, when they get transferred between departments and have to repeat themselves, and when they're left in the dark on progress. No person is an island, but if your organization works in silos, managers, dispatchers, field technicians, and contractors will all be marooned.

## How does ServiceNow help?

With one platform, one architecture, and one data model, ServiceNow tears down the walls between silos, joins up disconnected systems, and breathes life into inefficient processes to increase productivity and reduce cost. The Now Platform seamlessly connects your people, processes, and data on a single system of action to address customer needs efficiently, transparently, and proactively. ServiceNow® Field Service Management (FSM) is built on the Now Platform, and is designed to help increase operational efficiency and make your field service organization even more impactful. Teams can collaborate, processes are optimized, and everyone can get the visibility they need to stay informed.

**When employees stand alone, standout service becomes the exception, not the norm.**

## What to expect

You'll be up and running at speed with intelligent automation, out-of-the-box workflows, AI, and tools that make work easier and better.

Field service teams are empowered with access to the information they need to deliver proactive service and speed up positive outcomes. And with a single, unifying source of truth, everyone—customers included—will have complete visibility into work order statuses as well as asset and service histories.

Wherever their jobs take them, technicians can use the Field Service Management mobile app to ensure they have all the job details, customer information, collaboration tools, and contextual knowledge to maximize first time fix.

**"Before ServiceNow, we would've had multiple tickets to handle field service, but now we can streamline support and give the customer a totally seamless experience while working as one team."**

Daniel Pilquist  
Service Desk Manager

Tunstall Nordic

## Tunstall

### Care in the community

Tunstall specializes in technology that enables home healthcare and supports caregivers in the field. ServiceNow makes it easier for them to deliver efficient, effective, and empathetic care.

**70%** increase  
in customer  
satisfaction



[Read Case Study](#)



## PRIORITY 2

# Automate and optimize processes

## What's the challenge?

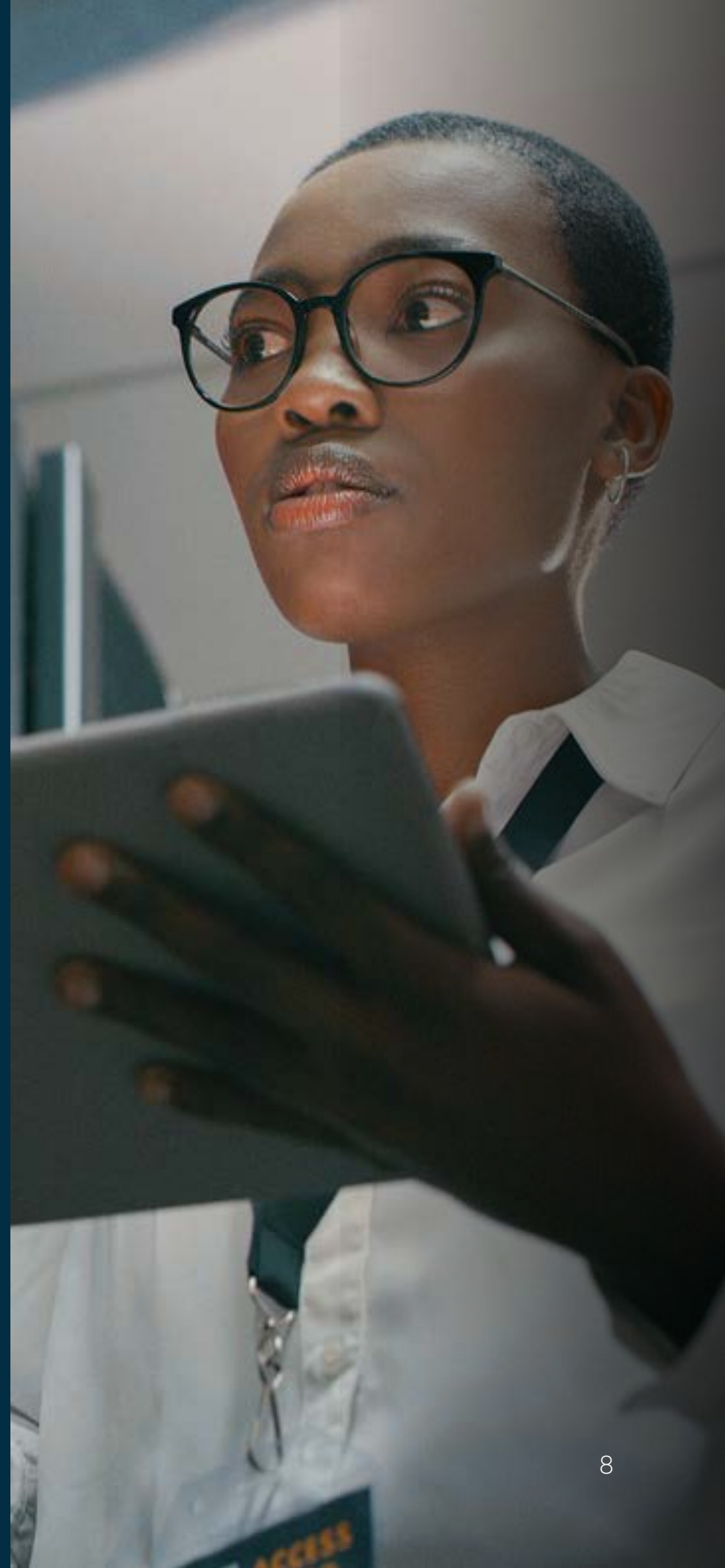
The field service talent pool is shrinking. Experienced technicians are retiring, and it's proving more difficult than ever to attract and retain the next generation of workers.<sup>2</sup>

Great people want to be productive, challenged, and empowered. They don't want to get bogged down in paperwork. Manual and disconnected processes result in a heavy administrative lift for technicians and dispatchers, and unnecessary effort. These inefficiencies prevent your field service team from doing what they want to do most—resolve customer needs. People deserve tools that help them do their best and most rewarding work. If you don't provide them, your competitors will.

## How does ServiceNow help?

ServiceNow Field Service Management allows your team to focus on high-value work instead of getting bogged down by inefficiencies. By automating processes, field service organizations can reduce manual, repetitive tasks so that everyone can focus on the work they excel at. Digitizing and automating processes also helps drive consistency across the organization. To help reduce paperwork, technicians can debrief the work order and make updates while onsite directly in the FSM mobile app. Checklists help keep them well informed on work to be done, and debriefing is streamlined with the ability to scan bar codes and capture images all from one mobile app.

<sup>2</sup> According to Service Council™ research, 60% of technicians aged 25–44 do not plan to be a technician for the remainder of their career (Voice of the Field Service Engineer, April 2021)





# What to expect

Employee productivity will soar. More efficient processes drive and support proactive service. They save you time and money too.

We enable purposeful automation which means we can take the digital sprawl across your enterprise and deliver an automated, AI-enabled system of action, taking the load and burden off your employees and driving real and measurable business outcomes for every part of your business globally, at scale, driving efficiency and reducing cost across your organization.

**"ServiceNow has helped us to simplify and strengthen our terminal maintenance services. We now have more time to innovate while being confident that our customers are getting the very best service."**

Simona Dovera  
Head of Corporate Systems

Nexi



# It pays to automate

ServiceNow FSM helped digital financial payments provider SIA (now part of the Nexi Group) to drive efficiencies and enjoy explosive growth.

Within two years...

90%

automated  
field service

80%

reduced  
log work effort

48K

saved  
hours

[Read Full Article](#)



# Increase scheduling and dispatching efficiency

## What's wrong with the way things are?

Inefficient scheduling and dispatching is costing your business time and money. You're rolling more trucks than you need to and burning up your margins (not to mention the environment). Work is hard for dispatchers who struggle to keep tabs on who's where and what parts they have onboard; field workers are spending more time driving than serving customers; and you're gambling with your KPIs.

## How does ServiceNow help?

With ServiceNow FSM, you can increase work planning, scheduling, and dispatching efficiency to make work easier and optimize costs. You can start by ensuring optimal resource coverage with territory planning capabilities to visualize, create, and manage service territories. You can then automate the scheduling and dispatching of short-and long-cycle work with Dynamic Scheduling and Schedule Optimization.

Enable dispatchers to focus on exceptions with enhanced usability in the Dispatcher Workspace, where they get a complete view of tasks, crews, locations, and status. It improves the dispatcher experience and streamlines their workload to ensure they are able to adjust as needed to meet customer needs.



# What to expect

Scheduling and dispatching will be more efficient and effective. First-time fix rates will increase, and overtime will decrease. It'll be easier to meet SLAs, and costs and emissions will come down.

Dispatchers have a lighter workload and are empowered to make better decisions, faster. Field workers will spend less time traveling and will turn up on time, with the parts they need, ready to do the job you pay them to do. They'll be proud to work for your organization, and customers can enjoy faster, more proactive, and more personal service.



## Real-time visibility in field service operations

ServiceNow solutions have transformed how Flinders University works. Employee satisfaction has vastly improved, with improved visibility and reliable data empowering staff to complete tasks quickly and on schedule. Support teams can now focus on more complex and interesting parts of their work rather than copying and pasting information between systems.

75%

reduced  
time completing  
cleaning requests

35K

increased  
tasks handled  
each year

24K

integrated  
facility assets via  
a single platform

[Read Customer Story](#)

**"Many tasks require more than one tradesperson or technician. As all information pertaining to each asset and the service request is in ServiceNow, we can manage resource allocation more effectively and resolve issues faster with fewer operational interruptions."**

Jayne Preece  
Manager of Customer and Business Improvement for  
Property, Facility, and Development Divisions

Flinders University





PRIORITY 4

# Maximize asset uptime

## What's the challenge?

Uptime is always the goal. Customers want their business-critical assets to run smoothly and have long and healthy lives. But organizations often lack the visibility into asset performance that's essential to getting ahead of issues and preventing them before they happen. In the reactive field service model, when things do go wrong, it's often the customer who finds out first and has to report the issue. By then, they're already frustrated. And unexpected downtime can significantly impact the business.

## How does ServiceNow help?

Maintenance servicing helps detect and address issues before equipment fails. Planned maintenance improves the longevity of equipment, reduces downtime, and prevents unplanned outages to minimize customer disruptions. ServiceNow FSM is designed to make managing your maintenance work much easier for both you and your customers. With ServiceNow FSM, you can build maintenance plans based on time, cycles, and usage.

ServiceNow allows you to easily define the who, when, and what of planned maintenance, allowing you to create personalized plans for each customer.

- Which accounts, locations, and assets are covered?
- When should this plan be triggered and how frequently should it be done?
- What work needs to be scheduled and what tasks should be completed?



# What to expect

Reduce asset downtime and maintain service commitments.

Avoid unexpected downtime and productivity loss that can increase costs and negatively impact customer satisfaction. Compliance will be easier and you need never miss an SLA again. Customers will enjoy more uptime, less downtime, and an all-around better experience.



## Embracing innovation to transform the service delivery experience

Xerox is using ServiceNow FSM and CareAR augmented reality to unlock economies at scale to achieve consistency and flexibility across its entire field workforce with the aim to lower costs, reduce inefficiencies, increase uptime, and shrink its carbon footprint.

594

metric tons  
reduction in  
carbon emissions  
in 12 months

10%

improvement in  
remote resolution  
rates when using  
CareAR over  
baseline

53

minutes of  
productive time  
unlocked, per  
technician per day

Learn More

“Using ServiceNow and CareAR, we’re giving our technicians access to the best information and expertise that we have.”

John Perry  
Vice President, Digital Experience for Service Delivery/Customer Service Technology

Xerox



# Empower customers to take action with self-service

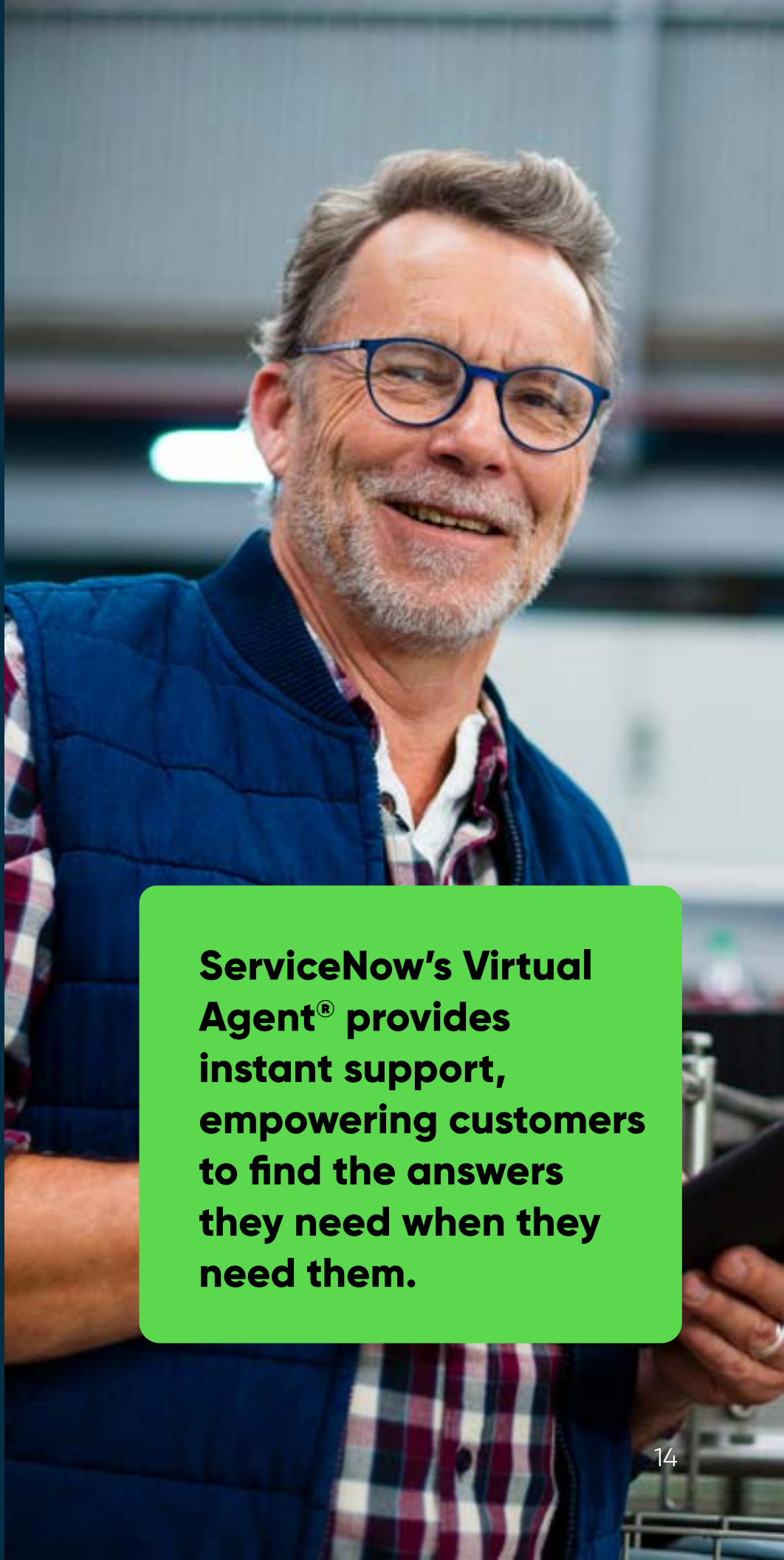
## Doesn't self-service put the effort on the customer?

The idea of self-service seems to fly in the face of what we know about customers: they want more value, and they don't want to have to invest a lot of effort. By placing the responsibility back in the hands of the customers, aren't businesses offering less and asking more? The reality is that customer self-service fulfills a separate need; it provides faster gratification when customers want it, including real-time responses, visibility, and quick service.

## How does ServiceNow help?

ServiceNow empowers customers with self-service portals, booking tools, chatbots, and omni-channel flexibility, meeting customers where they are on the channel of their choice. Through portals, customers can take action when it is most convenient for them - searching your knowledge base for product information, initiating service requests, tracking case and work order progress, scheduling appointments, and more. With our Service Catalog, any requests get routed directly to the right team, streamlining processes for customers and employees.

With our last mile communication, customers are proactively notified on their technician's estimated arrival time, including a link to a web page where they can see real-time details about the technician's location. This helps improve overall communication between the customer and the technician, and reduces costly missed appointments.



**ServiceNow's Virtual Agent® provides instant support, empowering customers to find the answers they need when they need them.**



## What to expect

Improve the customer experience while optimizing costs.

Self-service allows you to offer faster, more efficient, and more cost-effective support. Accessible at any time and from anywhere, self-service portals reduce agent workloads. At the same time, self-service empowers customers to find solutions, take action, and keep informed on their own terms, within their own timeframes.

## SCHEIDT&BACHMANN

### Real-time data and first-rate service

Scheidt & Bachmann is a global leader in parking solutions. Its solutions include ticketless entry and exit by scanning license plates, cameras to monitor availability of parking spaces, and the use of QR codes, UHF-Tags, RFID, and payment cards. Scheidt & Bachmann not only creates these innovations—it provides service and maintenance for all operational hardware.

**24/7** access  
to service portal



[Read Case Study](#)

**"As the majority of our customers run 24/7 operations, they can access the portal at any time and log service calls, which then creates an alert for both for us internally in the business and for the customer's car park operations manager."**

Jason Barnes  
Operations Director  
Scheidt & Bachmann UK



## **Providing proactive service helps you optimize costs while delivering seamless experiences**

Moving from reactive to proactive service can improve the customer experience, reduce resolution time, drive operational excellence, reduce the cost of service delivery, and help pave the way for new service offerings.

**ServiceNow is here to help you set a strong foundation for more proactive service.**

Please **get in touch** or read **The field service experience** to find out more.

**“We appreciate the close partnership with ServiceNow's FSM team, their willingness to listen and incorporate our feedback, and their commitment to continuous improvement.”**

**Adam Ouellette, ITSM Process Specialist, Princeton University**





Learn how to make field service your strategic differentiator.

[View Infographic](#)

Discover how to move your business from reactive to proactive service.

[View Webinar](#)

ServiceNow (NYSE: NOW) makes the world work better for everyone. Our cloud based platform and solutions help to digitize and unify organizations so that they can find smarter, faster, better ways to make work flow. So employees and customers can be more connected, more innovative, and more agile. And we can all create the future we imagine. The world works with ServiceNow™. For more information, visit: [www.servicenow.com](http://www.servicenow.com).