

**FALL 2024**

# **Part One: Guide to Field Service Automation**

**How the world's best field technicians are getting ahead**



**SERVICE PRO**  
*by MSI Data*

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# INTRODUCTION

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**The field service management industry is expected to exceed \$4.94 billion by year end here in 2024.** It's no wonder that with all the disruption how easy it can be to find yourself lost in the noise of buzzwords and terms. You may also find it difficult to implement new technology with so many changes all at once. There are a ton of new tools being explored every minute in the age of AI (or Artificial Intelligence.)

**\$4.94B**

field service management  
industry's expected  
growth by end of  
2024.

**The implementation of AI in field service management can lead to significant benefits:**

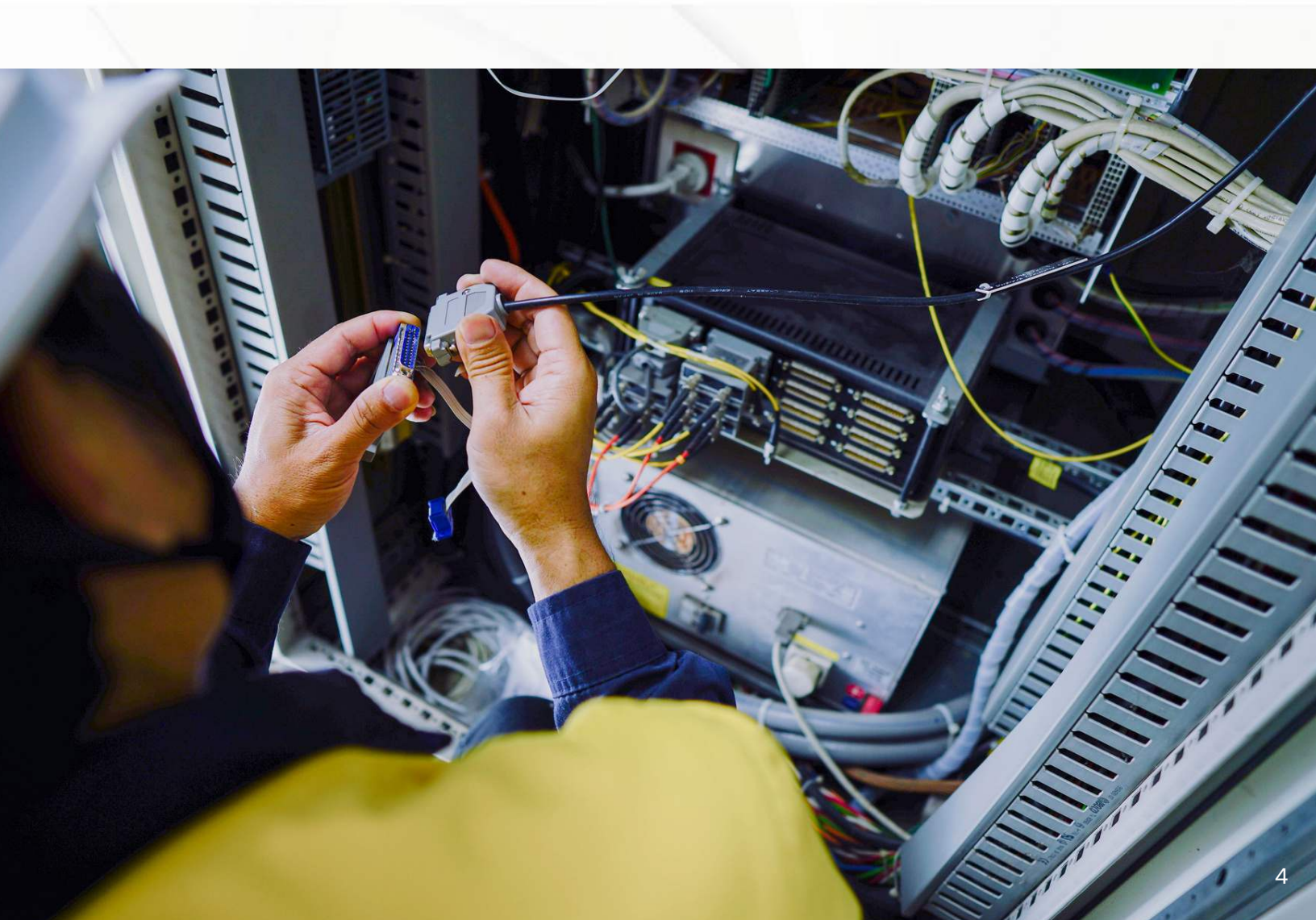
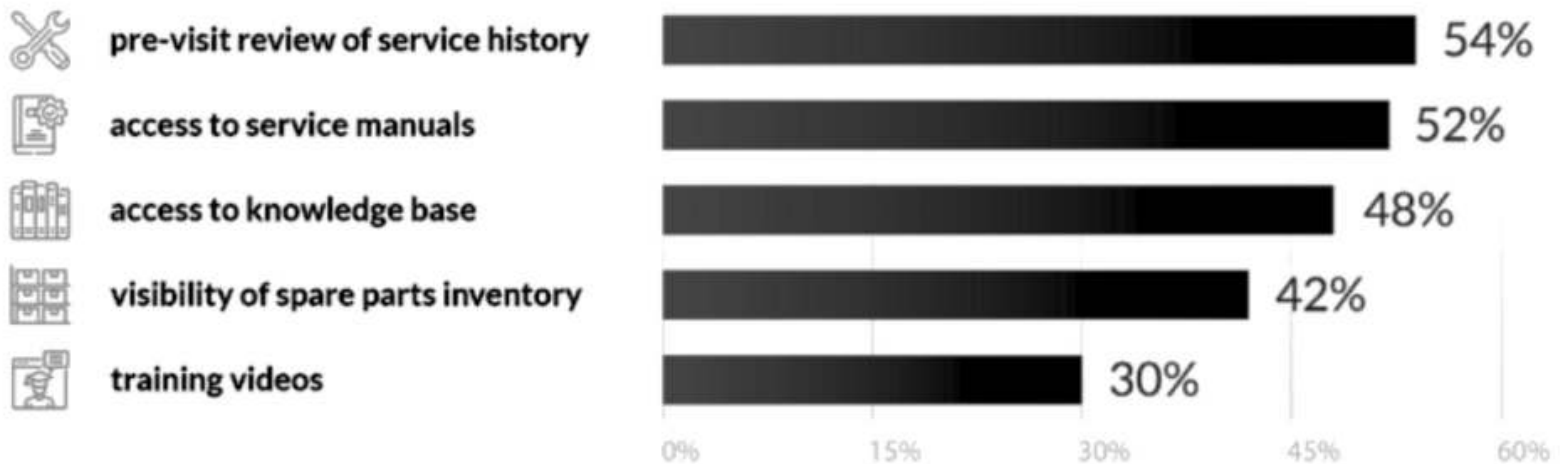
- Increased efficiency and productivity, reducing operational costs.
- Predictive maintenance helps avoid costly emergency repairs and equipment failures.
- Automation of routine tasks allows staff to focus on more complex, value-adding activities.

**This guide provides tried-and-tested strategies to elevate your field service performance.**

**Become an industry leader using purpose-built field service management tools in the age of AI.**



# Top challenges for field service techs in 2024



# WHAT IS FIELD SERVICE AUTOMATION? AND WHY IT MATTERS

Field service automation involves using AI technology to improve and optimize manual tasks in field service, such as scheduling, dispatching, and routing technicians. **Additionally, field service management software automates and simplifies communications, inventory management, and work order management.**

By breaking down silos and connecting them across your organization, you can move beyond reacting to issues as they occur.

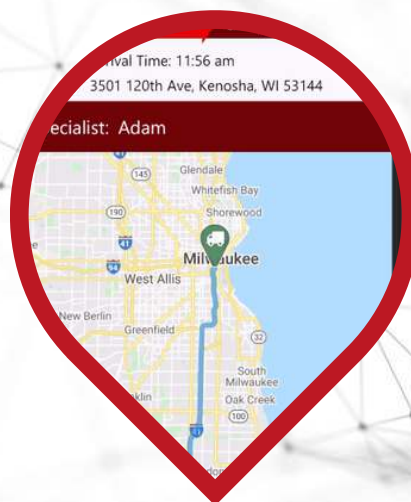
**Some of the core components for implementing technology that includes Field Service Automation, include:**

- Scheduling
- Dispatching
- Work order management
- Inventory management
- Mobile access
- And More!

**DID  
YOU  
KNOW?**

**89%**

**of companies still use  
manual methods for  
most of their field  
service tasks**





# KEY BENEFITS OF FIELD SERVICE AUTOMATION IN 2024 & BEYOND

- **Improved productivity:** Automating repetitive tasks saves time, money, and resources – and that's just the beginning.
- **Enhanced accuracy:** Feel confident knowing you have the most up-to-date information as data flows from your accounting system to the back office in real-time.
- **Better resource utilization:** Focus areas of your workforce where you need them most and relay tasks to be done – all in one place.
- **Increased customer satisfaction:** Spend all the time you save by automating tasks with the people who deserve it most: your customers. Serve them with increased efficiency, speed, and reliability.



# Field Tech Advancements

Savvy customers require higher equipment uptime and on-demand access to service history. Field service technology has evolved in stride to meet these needs.

Here are a few technology advancements used by leading field service companies.

## BASIC

## ADVANCED

### CUSTOMER COMMUNICATION



Confirm appointments  
by phone

Confirm appointments by  
automated text message



### SCHEDULING



Schedule service weeks  
in advance with wide ETA

Request service online  
with customer portal



### PROACTIVE REPAIR



Repair after  
equipment failure

Repair before failure  
with IoT connectivity



### PAYMENT



Mail invoices weeks  
after service

Invoice same day  
as service



### SELF-SERVICE TOOLS



Address customer queries  
by phone and email

Provide self-service tools  
with customer portal



# INSIDER SCOOP ON FIELD SERVICE SOLUTIONS: HOW TO CHOOSE THE RIGHT ONE

## STEP ONE: DEFINING NEEDS VS. WANTS

When searching for a field service management software, an organization should definitely have done their homework first. **Best practices would be to identify what you are doing today, what isn't working, and what you are looking to improve.**

Even more advanced companies will often find success by creating a 'Need vs Want' list when they identify what they are looking for in a technology partner. If you can capture 80% of your Need items, you are in the right spot for a good technology.

## STEP TWO: RESEARCH THE TECHNOLOGY

Now, just because you found a company that can meet your needs doesn't always mean they're the right partner for you. It is critical to have a base understanding of things like the implementation process and timeline, post-project support, customer success offerings, and hidden fees that can creep up to bite you.

## STEP THREE: VET THE PARTNERS

A good partner should want you to be successful and they should be honest with you through the entire process of you looking at their solution. If they say "yes" to everything or say they "do it all" the advice we'd give you is to RUN – nobody is perfect, and software is also not perfect.

The right partner can make or break a successful investment in technology. Make sure you vet the partner as much as you vet the technology while you do your search.

**"If you can capture 80% of your needed items, you are in the right spot for a good technology."**





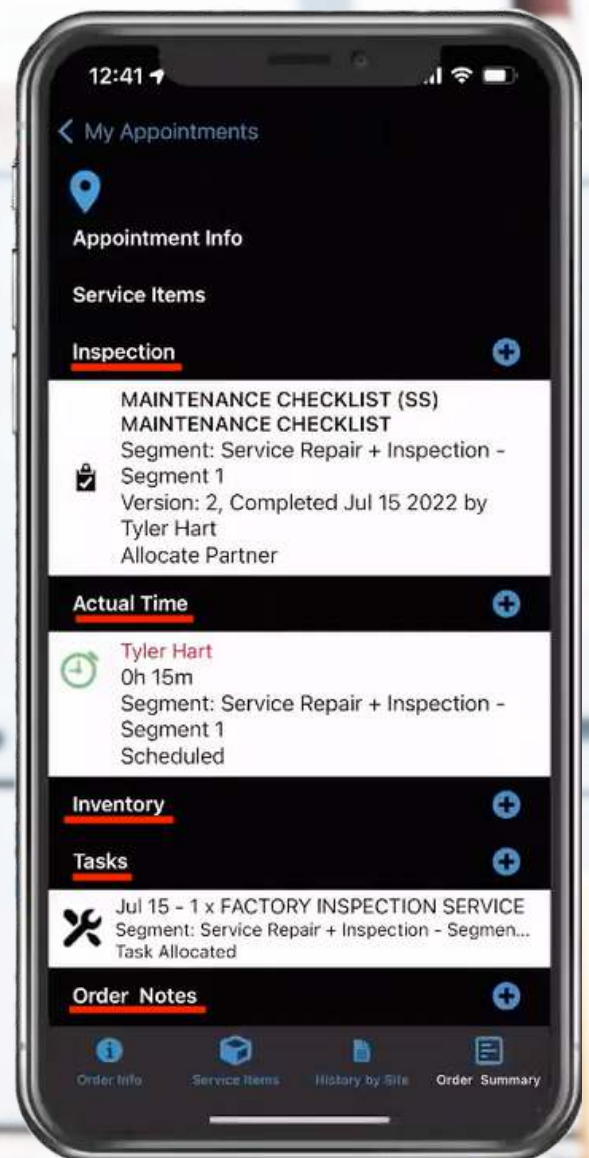
# LOOKING AT SPECIFIC INDUSTRIES TAKING ON AI

What else comes to mind when thinking of the concept of field service automation? Today we're going to highlight the importance and value of software for field service and quickly introduce a few of the transformative benefits it can bring to service organizations especially now in the Age of AI.

## Power and Energy

Within the Power and Energy industry there are several ways to leverage the power of Generative AI to improve, gain efficiency, or minimize downtime. One-way organizations are exploring the use of Generative AI within this segment is through Predictive Maintenance support.

Companies can leverage their existing data and metrics, with the help of Generative AI, to improve predictive models around repair, asset optimization, and system downtime.



# LOOKING AT SPECIFIC FIELDS TAKING ON AI: CONTINUED

**Heavy Equipment** – Machines are now being inputted with new devices, widgets, and sensors all filtering data through the Internet of Things (IoT) in order to make more advanced decisions. **This data can include fuel usage, working hours, warnings, errors, and much more to allow an organization to make critical decisions** in advance compared to years past where these decisions were made late or based on gut feel. Gone are those days!

**Mechanical Equipment** – A core challenge with field engineers and technicians is the requirement of documentation of their work. Historically, paper was the primary means to document work as proof to support invoicing. **Today, mobile applications such as Service Pro by MSI Data allow technicians to leverage a dynamic mobile experience to capture notes through digital forms, take pictures of work completed, and capture client signatures in real time.** Automatically sending all of this information back to the home office expedites invoicing and shortens one KPI in particular: the critical “service-to-cash” cycle.



# AN AUTOMATION SUCCESS STORY IN FIELD SERVICE



- Specializes in process control solutions
- Serving the industrial automation and process control industry since its founding in 1969

## OVERVIEW

The main challenges **Eastern Controls** faced they experienced significant growth in their service offerings, operational challenges began to emerge, including:

- Instances of double bookings
- Missed appointments
- Technician over-utilization
- Lack of visibility into scheduling
- Inability to track critical KPI's

This robust software provides Eastern Controls Inc. with advanced tools to **streamline their scheduling processes, automate appointment management, and optimize technician allocation.**

With Service Pro's real-time visibility features, E.C.I. now efficiently tracks technician utilization, reducing instances of over utilization and ensuring a balanced distribution of resources. The software's capabilities **also help in preventing double bookings, contributing to a more organized and customer-centric approach to service operations.**

 [\*\*Read the full story here\*\*](#)



**Real-time communication**



**Evaluate utilization and service quality**



**Avoid double bookings**



**"In adopting Service Pro, ECI has successfully transformed its service delivery, overcame operational challenges, and enhanced overall efficiency."**



# Common Challenges and How to Overcome Them

## OBSTACLE 1: NOT HAVING A TECHNOLOGY PLAN

1 An area all organizations, not just service organizations face, struggle with when something is new to employees is change. **Change is inevitable and we all understand technology is an enabler—and even an accelerant if used properly.**

When employees are resistant to change, an organization can struggle and even some may cancel projects. Having a strategic plan for communication, enablement, and adoption is critical for an organization to have when making a technology decision. A good technology partner can also provide recommendations for a smoother transition.

## OBSTACLE 2: DATA INTEGRATION ISSUES

2 “Garbage in, garbage out” is very true when it comes to technology investments. Most organizations want a connected technology system, meaning various applications will talk and work well with each other, but when you have legacy, paper based, or just lack of information or data it becomes extremely difficult to progress forward.

**Having a clean starting point, with clean data, is critical for a smooth connection between technology systems.**

# Common Challenges and How to Overcome Them

## OBSTACLE 3: TRAINING AND ENABLEMENT DIFFICULTIES

Not only can change management be a struggle for organizations when adopting a new technology, but a proper enablement and training plan can at times be difficult to create. Will you start with one branch? Power Users? Big Bang? Ensuring you have a rollout and training plan, paired with the right technology partner, will mean the difference between a tough rollout and a successful one.

## OBSTACLE 4: TIME AND PROJECT PRIORITIZATION

An area most organizations fail to fully understand at time of a new technology purchase is what is required of them versus the technology partner. For enterprise level technologies, meaning you aren't buying online with a credit card, time and energy will be required on both the buyer and the seller. Ensuring you can dedicate the right number of resources, time and energy to a project will ensure a smooth, timely, and successful one.

**For even more tactics on how to best be ready for tackling all of the obstacles in bringing on a field service solution, explore the top 10 field service challenges and how to solve them [here](#).**

# BRINGING IT **TOGETHER**

## FROM THE FIELD TO BACK OFFICE

Leading service companies empower their field technicians and back office team to be in lockstep to best support their customers. But if your team still uses whiteboards, multiple phone calls, and paperwork, then they're likely spending more time on internal communication and data entry than they should be.

And now with **more than 16 million US workers working remotely**, communication between team members is even more challenging.

**From a recent survey of service companies, for Apollo Technical more than 90% stated their office personnel and technicians are working fully remote.**

**60** mins

every hour,  
thousands of new  
tools for AI  
are created

*Automation  
is now a  
necessity.*



**By using manual, paper-based methods of collecting information, service organizations are likely missing out on opportunities to grow existing customer relationships.** And that means a loss of potential revenue, too.

All the information your techs gather at customer sites through the mobile field app automatically syncs with the back office software.

This provides your office personnel with a real-time window into the field, almost as if they're on site with the techs. Now your techs and administrators are always in sync.



# CONCLUSION

Become the leader in your industry by taking advantage of field service technology now. **Start by selecting the right partner for your digital transformation.**

Field efficiency is Service Pro by MSI Data's sole mission. Our cloud-based field service management software, helps companies **increase productivity by eliminating paper and automating repetitive tasks.**

**Gain Visibility. Maximize Profitability.**

Ready to get results? Let's chat! Email us [sales@msidata.com](mailto:sales@msidata.com).

**40%**

reduction in time  
wasted on  
inefficient efforts

**\$1250+**

average add-  
on revenue  
per inspection

**100%**

increase in  
technician-to-  
office work ratio

**\$100k+**

annual savings  
with integrated  
system

**3-week**

reduction in  
invoicing time

**\$2.9M**

in warranty  
write-off savings

Ideal solution for firms performing field service work to  
**install, repair, maintain, and inspect in nearly any industry**



Power & Energy  
Equipment



Mechanical  
Equipment



Industrial  
Equipment



Commercial  
Equipment



Oil & Gas  
Equipment



Medical  
Equipment



Fire, Life & Safety  
Equipment



Other Industries



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field service technology  
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