



fluido
an Infosys company

Preparing for a
**Field Service Solution
Implementation**

Starting Your Field Service Solution Journey

Do you want to know more about technology modernization and the way your organization's field service operations are run?

This guide is for you.

You might be thinking about how to prepare for the start of your field service transformation journey or perhaps you want to understand the current trends in field service. You could also just be interested in incremental improvements of your current field service processes and technologies without looking for the next big change.

Whatever your objectives are, I'm sure you'll find some food for thought in the following guidelines based on Fluido's experience in Field Service Solution projects. In this guide, I will cover the three major elements to consider when it comes to ensuring your readiness to embark on any field service transformation journey.

Vesa-Tapio Halmeaho

Field Service Practice Lead
Fluido

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The key trends in field service are:

- Process automation
- Servitization business model
- Maintaining & growing talent
- Technologies enabling these trends



Vesa-Tapio Halmeaho

When was the last time you critically analyzed the customer journey of your field service operations?



1. Strategy & Business Priorities

Companies are working towards being even more customer-centric than before. At Fluido, we have been helping our customers on this journey for over 10 years.

If you want to have field service operations that work in unison with the other aspects of your customer journey, you need to have 360-degree visibility of your customers' assets as well. This asset-centricity is a key element in thinking about your priorities for field service. You need to understand the data behind the products your customers have bought. With this information, you can provide them with the best possible service offering.

Start your assessment with a top-down approach

When starting a new field service improvement initiative, begin from your company's strategy and priorities. Do you work in an area where you are trying to add revenue by increasing your customer base and providing new and innovative services, or do you want to focus on cost savings and getting the most out of your current resources?



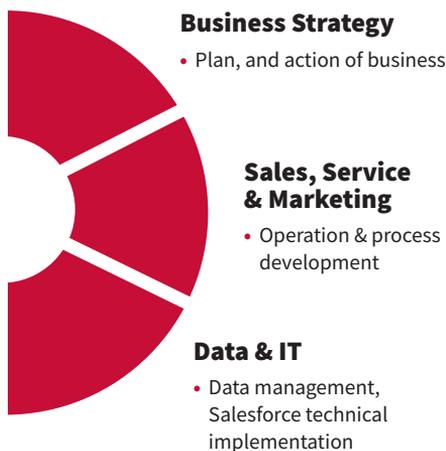
Start your assessment from the top down.

Before starting your project you should define the objectives described in the pyramid above along with key performance indicators (KPIs) with your key stakeholder groups to establish clarity and to be able to track the success of your project.

The importance of a data strategy

In addition to your business strategy, your data strategy is also an important factor to consider when implementing a new field service solution. The idea behind developing a data strategy is to make sure all data resources are positioned in such a way that they can be used, shared and moved easily and efficiently. A data strategy helps ensure that the data is managed and is used like an asset, and that it also establishes common methods, practises and processes to manage, manipulate and share the data across the enterprise in a repeatable manner.

Data strategy, why?



Having data strategy is an important factor in ensuring success with field service solution implementations.

In a Salesforce context we often refer to establishing a Customer 360 view, meaning that at any given moment you have full 360-degree visibility of your customer data so that you can make decisions that lead to the best possible outcome for your customers and your company.

Disconnected Data

Disconnected data creates problems and slows down your end-to-end processes. It is substantially more efficient to have your customer and asset data accessible in one system instead of having to seek data from many different systems to form a unified view of your assets and customers. With one system, you can form a full overview of

the information you need to provide to your field service agents and other stakeholders. If your frontline employees and customer service do not have tools to provide them with access to relevant information, your operations might suffer from slow end-to-end processing times, unneeded handovers, and poor customer satisfaction.

Digital transformation requires time, effort and money. You should be well prepared to ensure that your project gets up to speed properly.

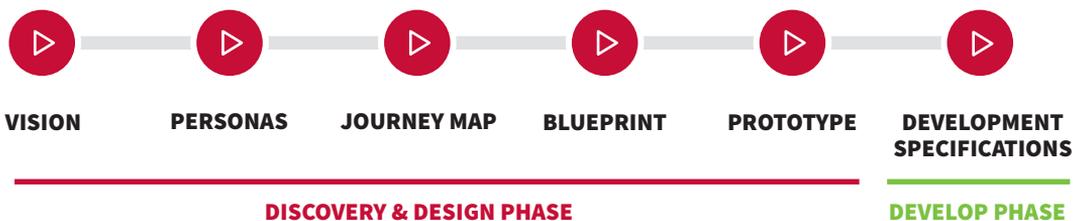


2. Your Organization's Readiness for Change

Clarify your current state and where you want to be

In the beginning, you should outline all the processes that are in the scope of your project. This is also an excellent opportunity to gather the relevant people together to take a critical look at your current way of working and to seek improvement opportunities.

A Fluidio way discovery – full service design process



You can use service design techniques to start your field service journey towards customer-centricity

Ask questions such as:

- Who are the stakeholders of each process?
- How does a specific process currently look from their perspective?
- What are their pains and objectives related to this process?

After you've mapped out your current processes you can focus on your vision and the target state for your processes.

Useful tools and concepts to support your vision are:

- Voice of the Customer
- Personas
- Customer Journey Map

After looking into these tools and concepts, you can use the experience of your stakeholders to build your process charts, data flows, and even a prototype well before selecting the technology and starting the solution design and build. At Fluidio, we often help our customers at this first critical stage by using service design methods.

The Digital Experience (DX) business at Fluidio



Our digital experience offering help you focus on the essentials during your transformation journey.

Prepare Your Team

Make sure your team is ready for the field service solution implementation.

- Evaluate your team's and stakeholders' experience and availability
- Train the project management methodology if needed
- Ensure the necessary resources have the capacity to participate
- Remember to focus on change management and communication

Our change management methodology will help you to solidify the business benefits that you are looking for.

Use Data As Your Asset

Often a field service solution implementation project can be all about designing and building a new IT solution with the chosen technology. To generate value of this new technology, you also need to understand and have access to all the data that feeds into it.

Your enterprise resource planning system (ERP) is usually the place for the majority of your master data. Without connecting

your field service solution and customer engagement platform to your ERP and Product Data Management (PDM), you can't provide the foundation for a good customer experience. Typically, these exercises usually lead to data cleansing, data ownership, and integration mapping activities. Ensuring data quality and availability is the first step towards servitizing your product offering.

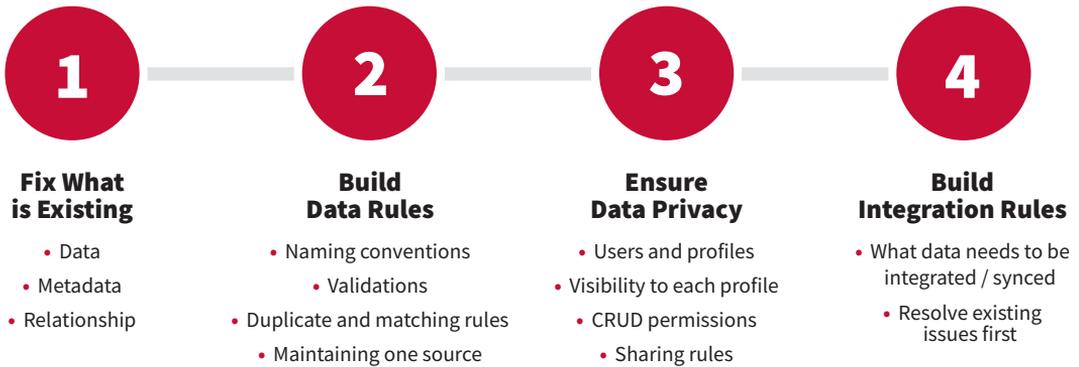
Case: Are Oy

Watch the video to see how Are Oy has increased their field service efficiency and transparency with Fluidio and Salesforce Field Service Lightning.

<https://info.fluidogroup.com/case-are>



Process Flow



The process flow for data governance

Think about what kind of data your to-be operations need, what is the current state of your data, what are the possible gaps and what do you need to bring the data quality to acceptable level. For example, if you are planning to utilise AI, study the data requirements for your specific use cases.

Manage Your Data

While you are implementing your new field service solution, you need to set up governance processes for data as well as for your new solution. Consider this when

reviewing your integration strategy and patterns to ensure that the solution you build is future-proof. The best practice is to use integration middleware (such as Mulesoft) to connect your systems and let the middleware handle any data manipulation.

Finally, consider what measures you are going to take relating to data security and sharing. Make sure that you are closely aligned with the product development of your technology platform when it comes to data management.

Operation

- KPI & data needed for operations & development
- AI-ready: what to predict?
- What to automate?

Data management

- Data governance
- Repeatable and easily maintainable data processing & data flow & integration design

Data sharing

- Unified data security policies
- Alignment with Salesforce core development program & Salesforce Einstein or other tools

Your data has to do with Operation, Management and Sharing

Salesforce automatically updates their products 3 times a year and each new release brings several new features which you can immediately take into use.

3. Technology Selection and Way of Working

Explore Your Options

When you evaluate the possible technology solutions, you'll get more out of the selection process if you get to know the technologies first and understand how their capabilities could help reach the targets of your company. Request customized demos to match your use cases to get a better understanding of the different technology providers.

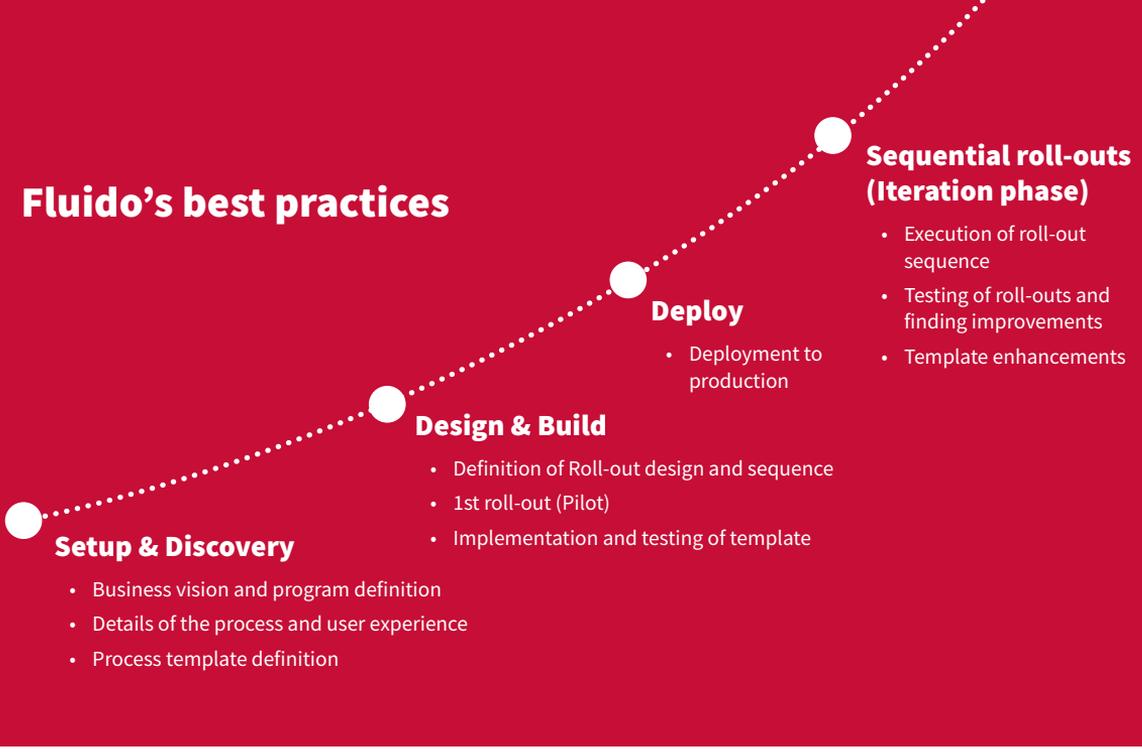
Starting a tightly-scoped proof of concept project (PoC) with technology providers can help you:

- Understand the strengths and weaknesses of the technologies
- Increase knowledge of the selected technologies
- Learn how your team would perform in the implementation project

If you use the standard functionality of the technology, you can be sure that your solution is future-proof towards any upcoming features. However, after considering the standard functionality you still need to ensure that the solution can deliver to your specifications. This is especially important in field service where the processes you define are often mission-critical. After you have weighed in the pros and cons from your perspective, you can make the decisions to proceed with either standard functionality or the customization process.

Another thing to consider is how the field service solution would connect to your customer engagement solution. Think about how you could connect your Sales & Service Contract Management, IoT, External Services and Analytics. Only a connected solution allows you to create exceptional customer experiences.

Fluido's best practices



Setup & Discovery

- Business vision and program definition
- Details of the process and user experience
- Process template definition

Design & Build

- Definition of Roll-out design and sequence
- 1st roll-out (Pilot)
- Implementation and testing of template

Deploy

- Deployment to production

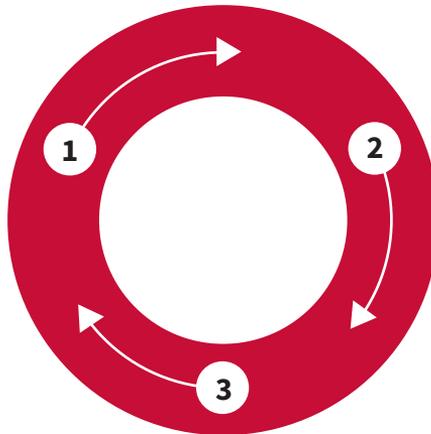
Sequential roll-outs (Iteration phase)

- Execution of roll-out sequence
- Testing of roll-outs and finding improvements
- Template enhancements

Connect Sales, Delivery & Collaboration

1. SERVICE SALES

“Sell what your customers need”



2. FIELD SERVICE

“Deliver it well”

3. STAKEHOLDER ENGAGEMENT

“Collaborate, engage & share in a meaningful way”

Be Agile

Based on our experience from over 1000 Salesforce projects, the best results are achieved if you start with a minimum viable product (MVP) approach and extend the solution as you go along based on the feedback. Working in an agile mode is the key.

The benefits:

- Gain business benefits early when you are delivery-focused on the MVP.
- Repeating iterations will help you become more efficient in releasing new iterations of the solution.

Preparing for a Field Service Solution Implementation in a nutshell:

To get the best value out of your implementation project, consider these areas. At Fluido we can help you in all of the aspects below:

- Start with your organization's strategic vision
- Understand your organization's priorities
- Discover the current state of your operations
- Make sure you have the right foundations in place for the change
- Consider data as your asset
- Understand that a majority of the change is not about the technology
- Build a competent team around you
- Select the right technology for your organization

For more information, please contact us: fluidogroup.com

The leading Salesforce implementation partner in Europe

We help you reach your goals and create outstanding customer experiences using Salesforce technology. At the core of our expertise is a deep understanding of Salesforce solutions and of our customers' businesses. Regardless of whether your focus is sales, marketing or customer care, we can combine your data, processes, and technology to make meaningful customer moments and drive your success.

We are a leading Salesforce Platinum Consulting Partner in Europe and we are also a Trailhead Academy Authorized Training Provider. In addition to the official Salesforce courses, we deliver tailor-made training courses to maximize user adoption and the potential of your Salesforce investment.

Backed up by Infosys, one of the top IT consulting companies in the world, we extend our reach globally and capitalize on their commitment to innovation and continuous learning. Together with other Infosys digital studios globally, we change the way companies and customers experience digital services.

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