knowledge17

http://clabs.link/lab132017a

WORK at LIGHTSPEED

Maximize Field Service Productivity

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servicenow

Agenda

- What is Field Service Management?
- Solution at a Glance
- Field Service Lab

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Speaker Introduction



Name: Mark Crumpacker

Title: Senior Advisory Solution Architect

Function: Customer Service Management and Field Service

Company: ServiceNow

Experience: 3 Years Development, 7 Years Customer Service, and CRM Commercial and Enterprise Solution Consulting.

Expertise: Customer Service Management, Customer Relationship Management, Partner Relationship Management, and Partner Driven Service, Business Process Mapping.

Achievements: Built an omni-channel support and service center to support customer events for 3 consecutive years that supported upwards to 130k conference attendees.

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Speaker Introduction



Name: Steve Werner

Title: Solution Consulting Manager

Function: Customer Service Management and Field Service

Company: ServiceNow

Experience: 17 years in enterprise software; 10 years in customer service and field service solutions

Expertise: Customer Service Management; Field Service Management; Enterprise Architecture; Business Process Consulting

Achievements: Strategic adviser to over 40 Global 2000 clients to help them modernize and transform their customer service business processes and technology solutions.

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Objectives and What You Will Learn

Objectives

- Participants will learn the business concepts and functionality for the Field Service Management solution

What you will learn

- Field Service Management Background
- Relationship Between Assets and Field Service Management
- Field Service Work Orders
- How to Use Central Dispatch to quickly identify the most available best skilled resource through the Dispatch Console
- Create and Complete Planned Maintenance Schedules and Tasks

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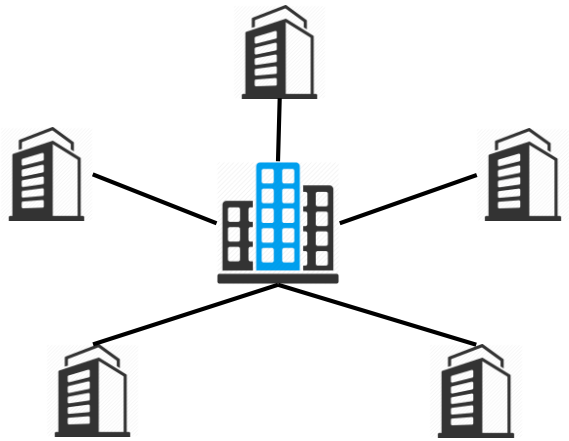
What is Field Service Management?

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- Field service management encompasses planning and delivery of services by a service provider on location. Used by organizations providing installation, repair, or regular maintenance of systems or equipment.

A Company with multiple campuses/ office locations – maintaining own assets.

e.g., Banks, Retail chains



A company providing deployment services, or after sales services to its customers

e.g., Equipment manufacturers, maintenance service providers

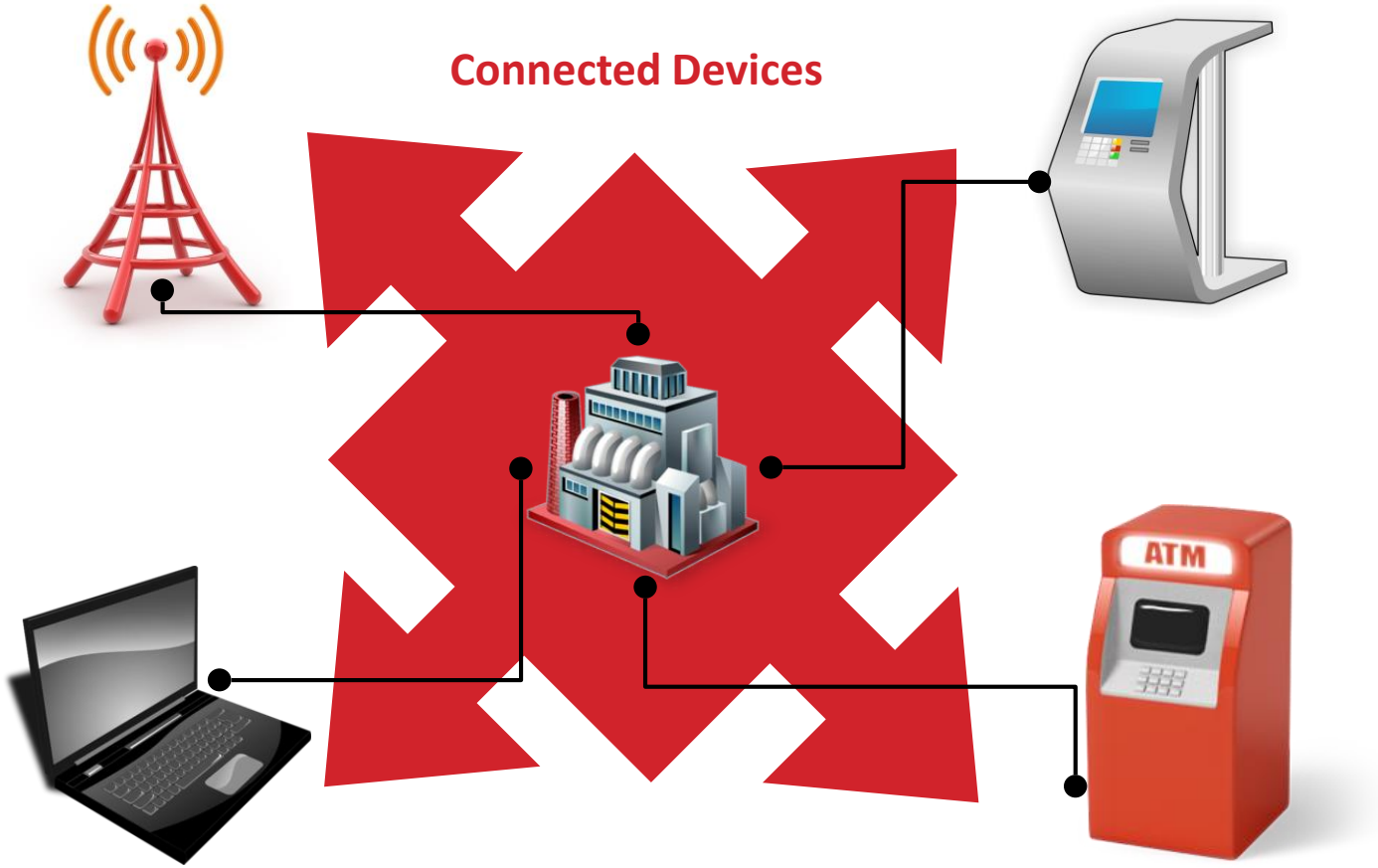


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Field Service Models

- **Reactive** – Break-fix
- **Planned** – Maintenance at regular intervals to prevent break downs
- **Projects** – Installations and reconfigurations
- **Proactive & Predictive** – Monitor assets and proactively initiate maintenance



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Field Service is Broken!

- Challenges with Field Service systems and processes today

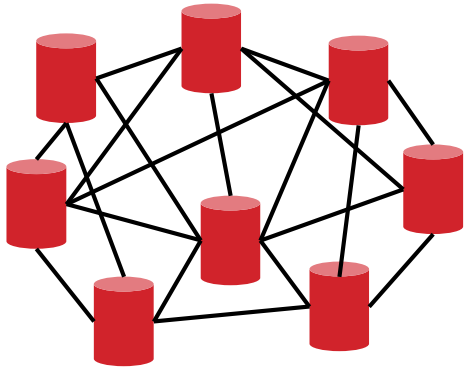
Complex

- No process visibility
- Inward focused – not customer focused
- Non-strategic



Disconnected

- Multitude of systems
- Non-integrated processes
- Redundant steps



Reactive

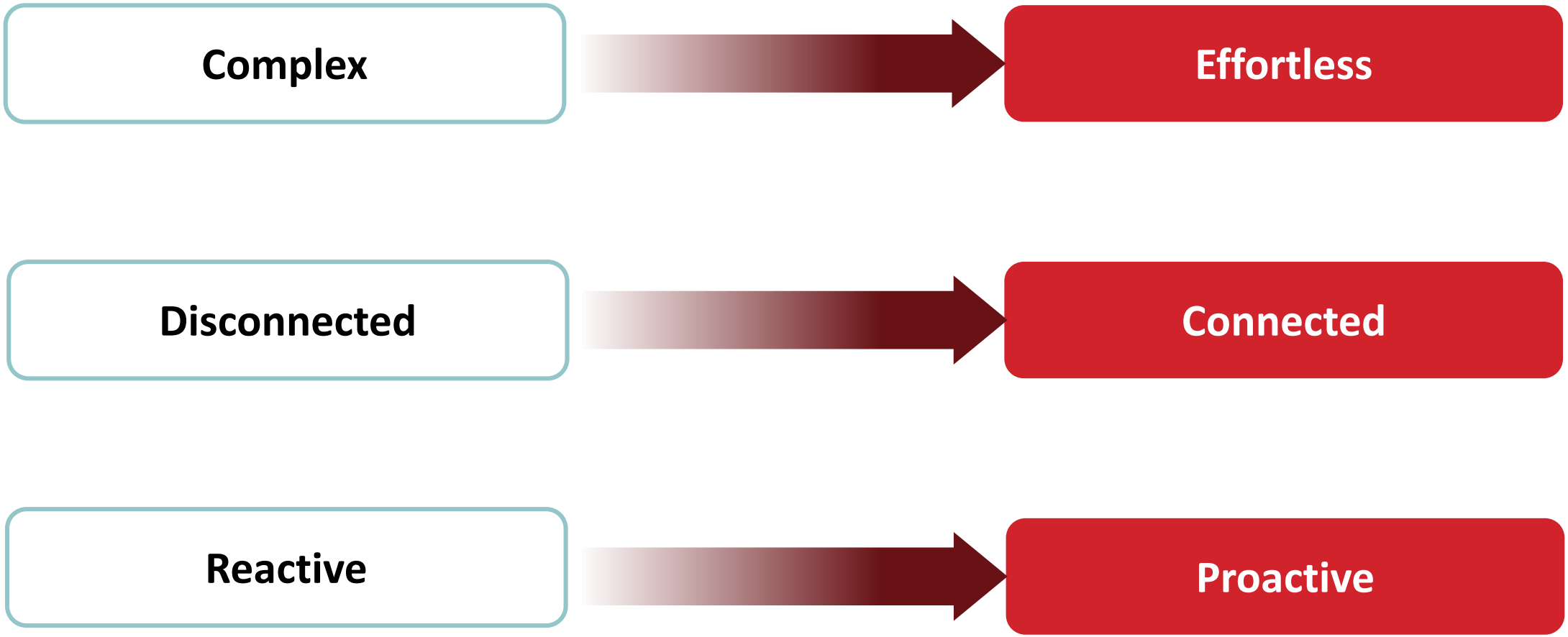
- Costly break-fix repairs
- Asset downtime
- Unpredictable



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Field Service Needs in a Service Economy

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Evolution of Field Service in ServiceNow

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Geneva

- **Customer Service Management** : Omni-channel case management integrated to Field Service processes
- **Native mobile app:** iPhone app for technicians
- **Flexible templates and checklists**
- **Performance Analytics Content :** PA dashboard for Field Service

Helsinki

- **Central Dispatch** – semi-automated assignment of work order tasks with intelligent agent recommendation
- **Enhanced mobile experience:** Mobile app improvements for technicians
- **Proactive communications and agent alerts**
- **Improved asset usage and drop-off**

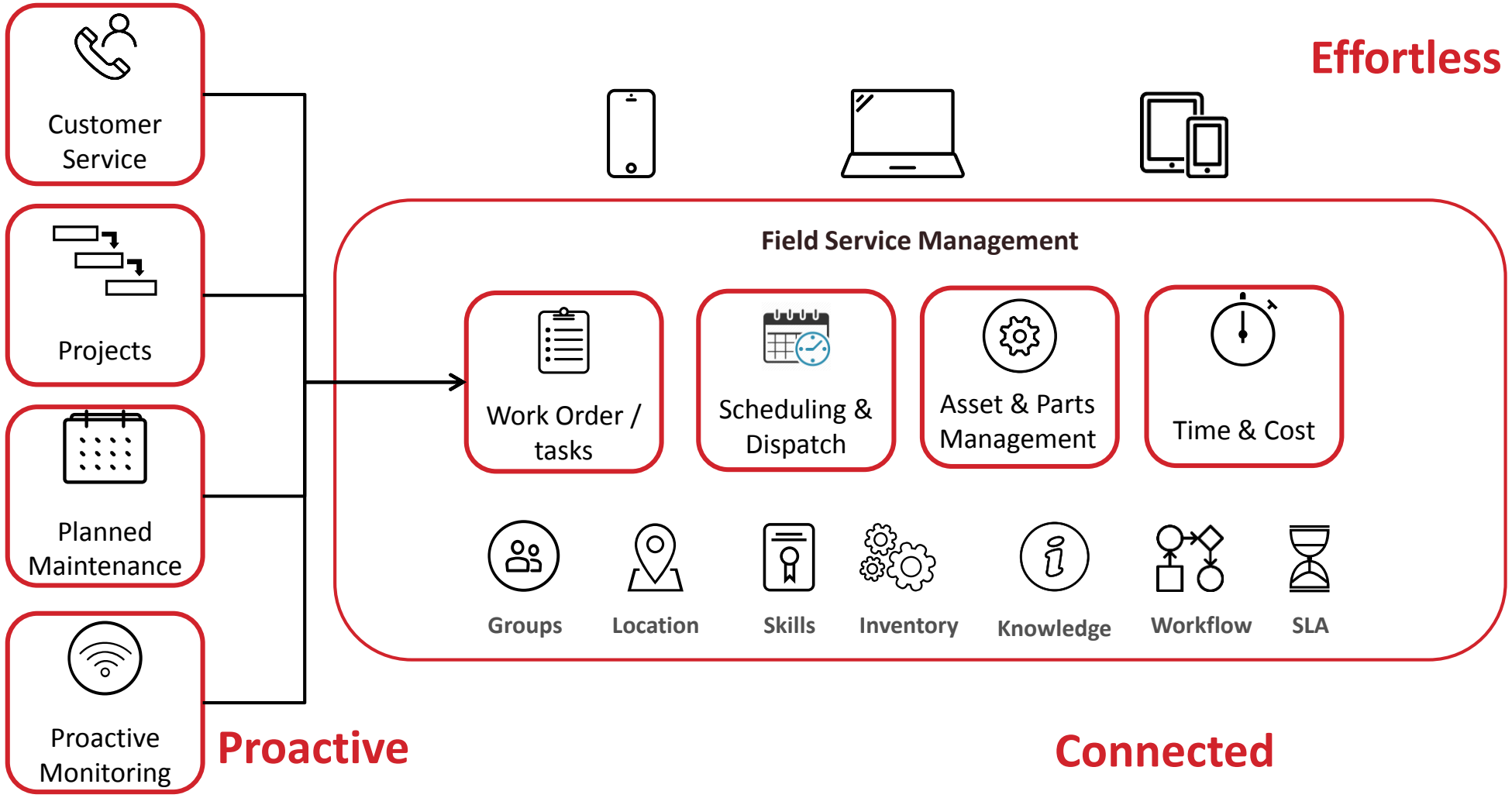
Istanbul

- **Technician calendar and scheduling:** Manage technician availability and time-offs
- **PPM Integration for long cycle work:** Manage customer onboarding and complex deployment projects and coordinate work execution with the field service teams
- **Signature pad and work order summary**

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Solution at a Glance

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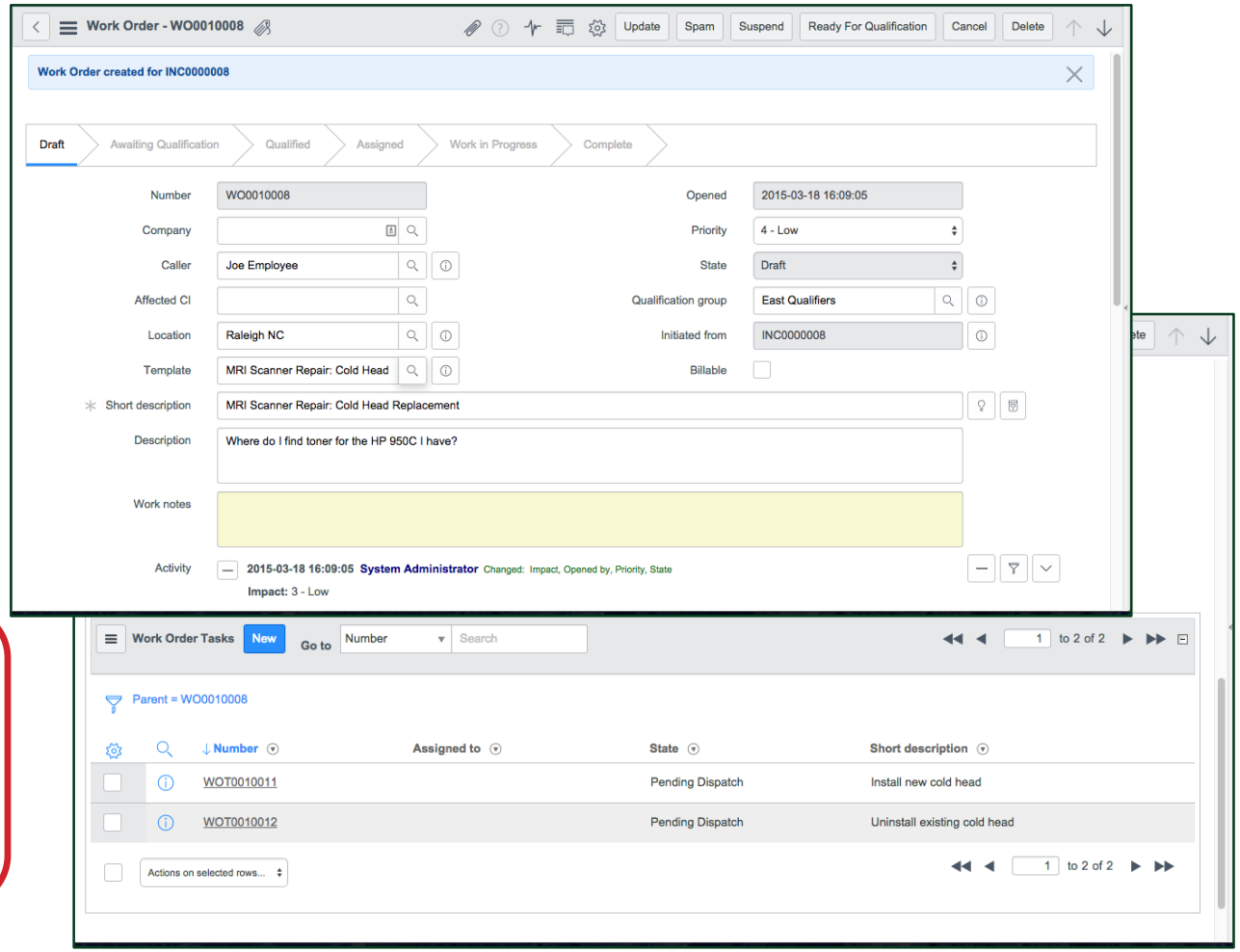


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Work Orders & Work Order Tasks

- Easily create Work Orders as follow-up to incidents
- Work order templates to organize work into tasks, and simplify parts planning & dispatch
- Qualify work orders to ensure relevant information is captured prior to assigning
- Track work order tracks to completion, to complete the work order

Better visibility into the end-to-end process
Standardization to ensure quality & consistency in service delivery

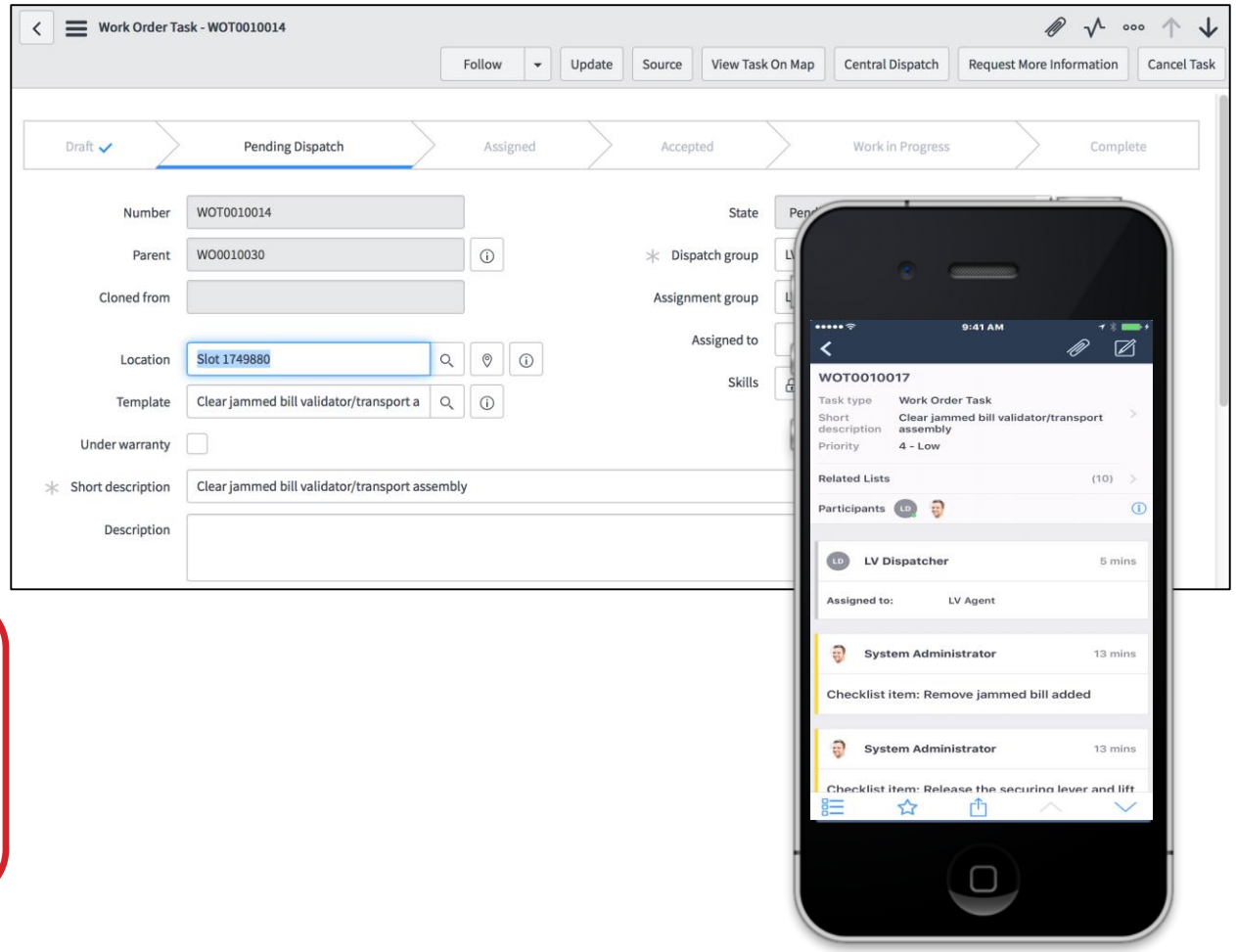


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Work Order Tasks & Execution

- Accept (or reject) and execute work order tasks
- Access and perform Work Management tasks from a mobile device.
- Track travel and work time
- Pick-up or return parts, and assets, and record asset usage
- Track incidental expenses
- Mobile access

Improved usability and productivity by making relevant information accessible anywhere

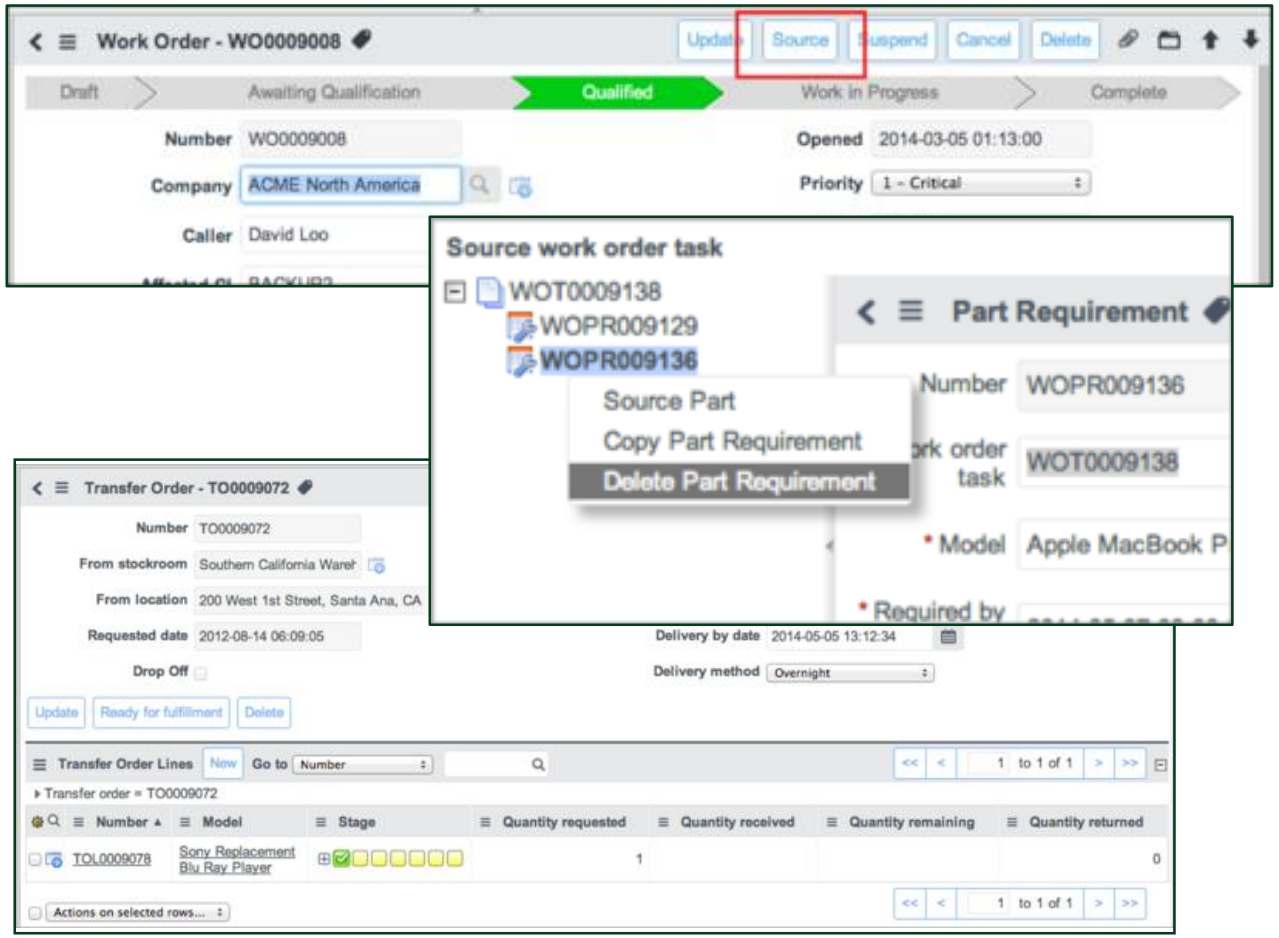


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Parts Requirements & Sourcing

- Create, copy, and delete part requirements as required for work order tasks
- Reserve or procure parts internally as well as from vendors
- View stock locations and stock levels, and transfer stocks as required

Integrated to parts management, ensuring right parts at the right place at the right time

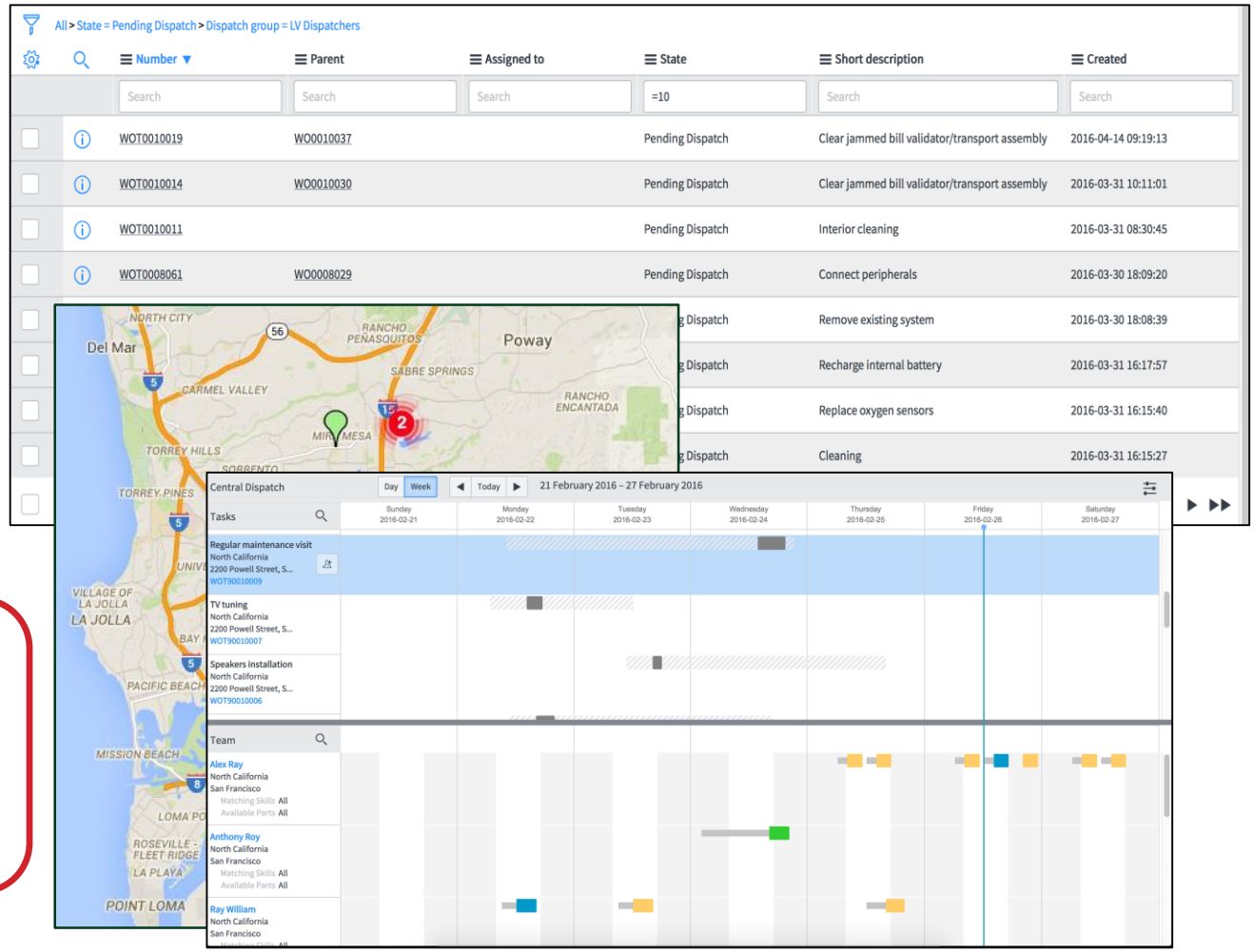


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Scheduling & Dispatch

- Ability to automatically assign work order tasks, or manually assign and dispatch
- Skills to determine right agent for the task
- Geolocation and map view to enable efficient dispatching
- Visual dispatch to easily resolve scheduling conflicts or dispatch of related tasks using a timeline view

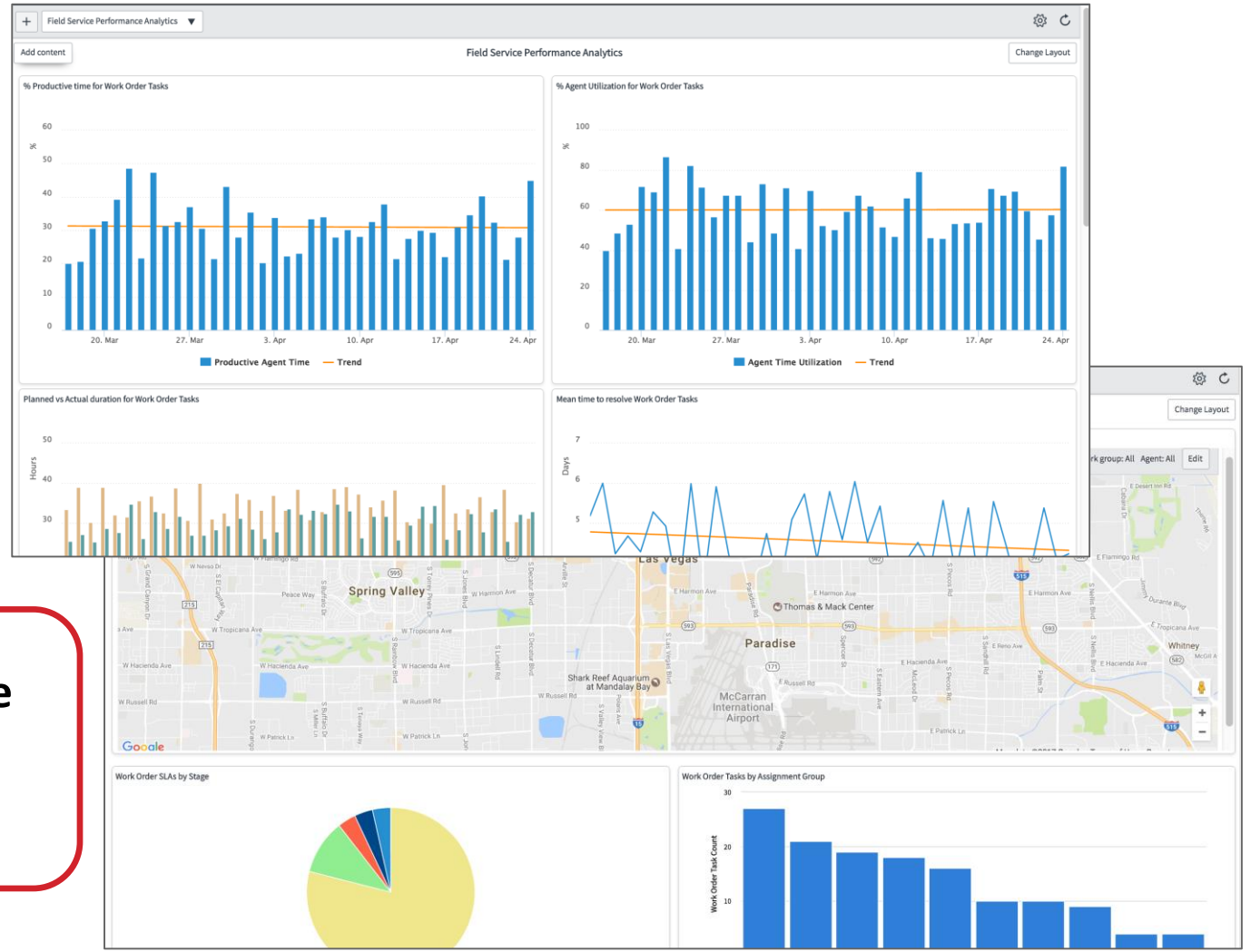
Increased resource utilization and productivity



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Reporting, Analytics & Actions

- Leverage Performance Analytics to get deep insights into various performance indicators
- Analyze and improve average work orders completed, average time to completion, first time fix rates
- Service costs & contract compliance
- Asset related metrics – Mean time between failure; Mean time to repair

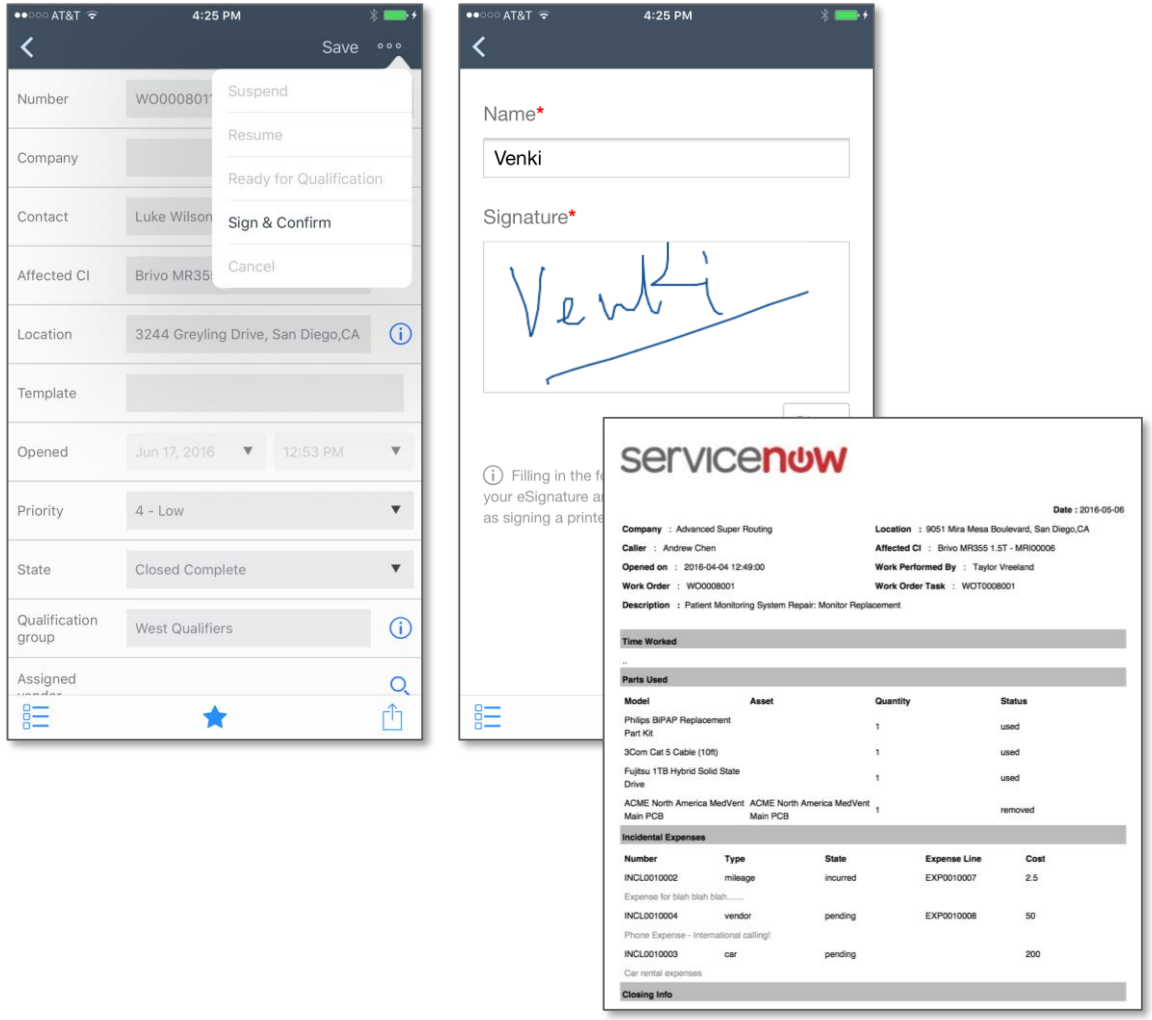


Deep insights on various dimensions of service process
Drive actions to improve quality & efficiency

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Capture Signatures and Present Work Orders

- Review work order with customers
- Get customer signatures on mobile device to acknowledge work completion
- Create work order summaries in PDF format



Streamline customer acknowledgement and review process

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Top Takeaways

Effortless

Automate and personalize self-service

Connected



Assign and resolve issues across teams

Proactive



Monitor and prevent future issues

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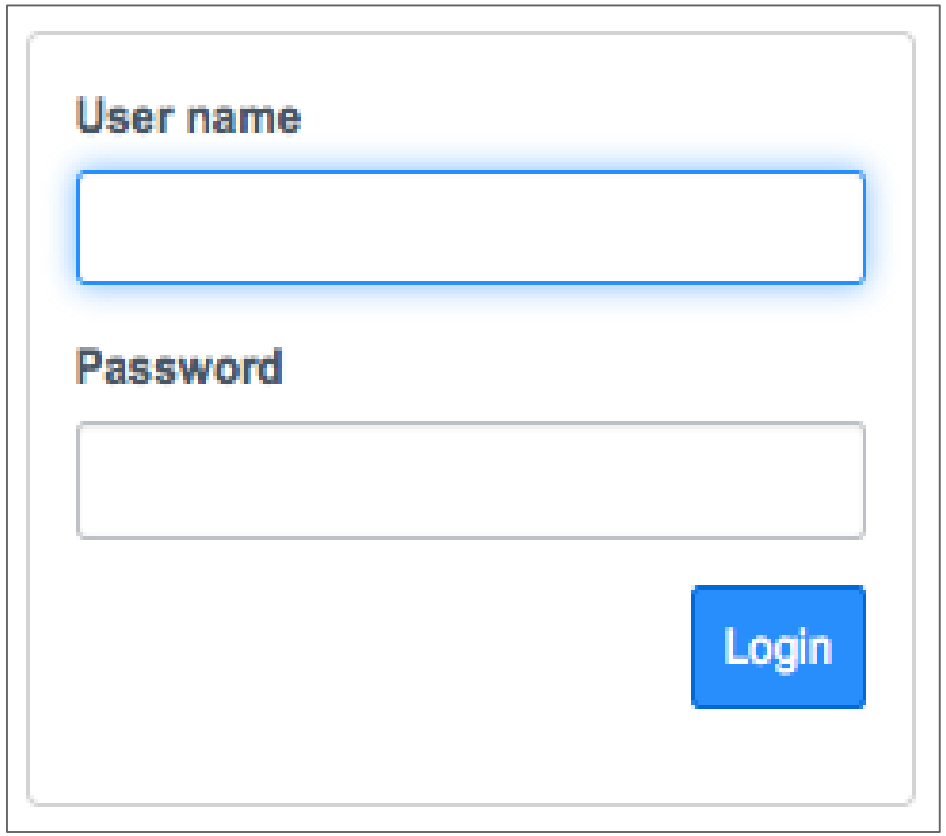
Lab – Field Service

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Access & Configure Your Instance

- Log Into your instance (IGNORE THE LAB COVER)
  - Username: **admin**
  - Password: **132017W300#K17**
  - **Those are all zeros**
- Once you've logged in you'll need to confirm the plugins have been enabled.



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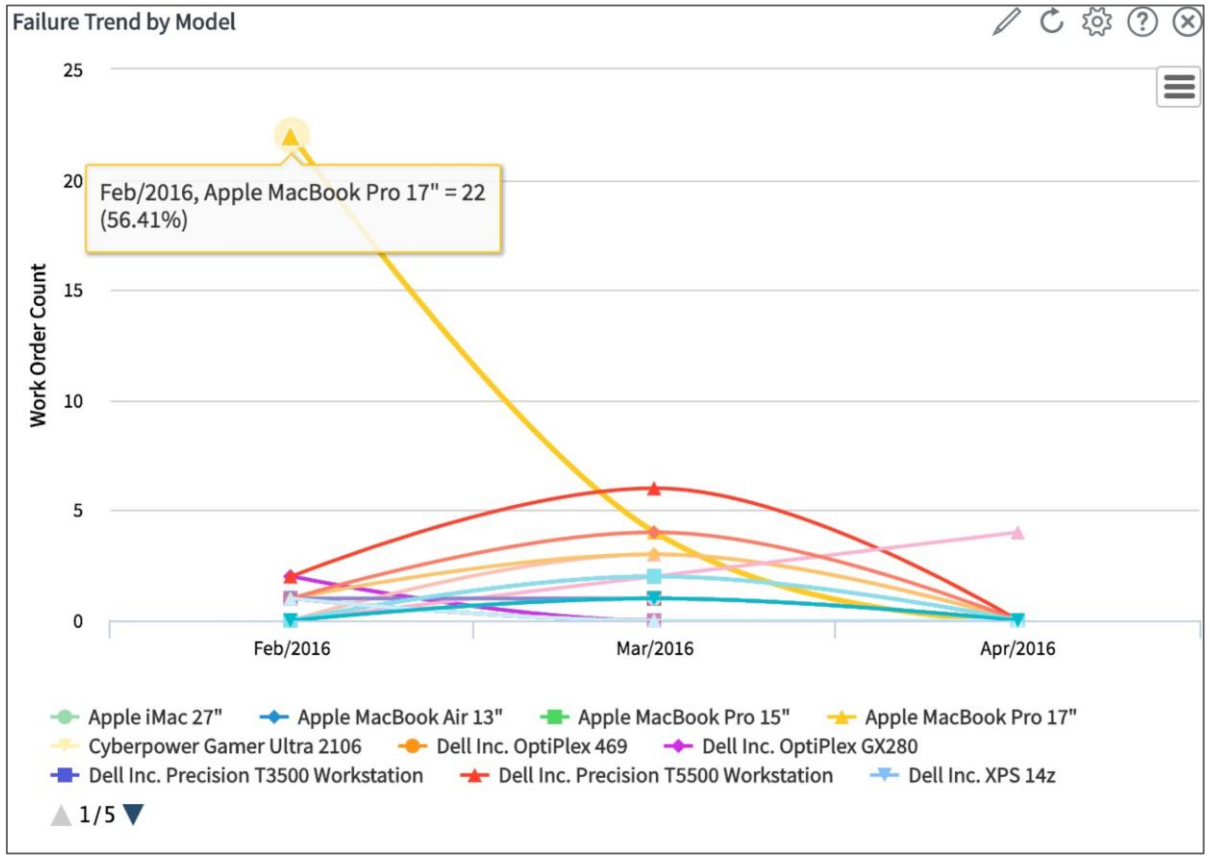
Access & Configure Your Instance – Plugin Confirmation

- Confirm that the following Plugins have been enabled:
  - Field Service Management
  - Field Service Management Demo Data
  - Field Service Management CMS Portal
  - Field Service – Signature Pad
  - Field Service Management Mobile
  - Field Service Management GEO Location Demo Data
  - Performance Analytics Content Pack – Field Service Management
  - Facilities Visualization Workbench
  - SM Planned Maintenance
  - Customer Service Management Demo Data

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Asset Management

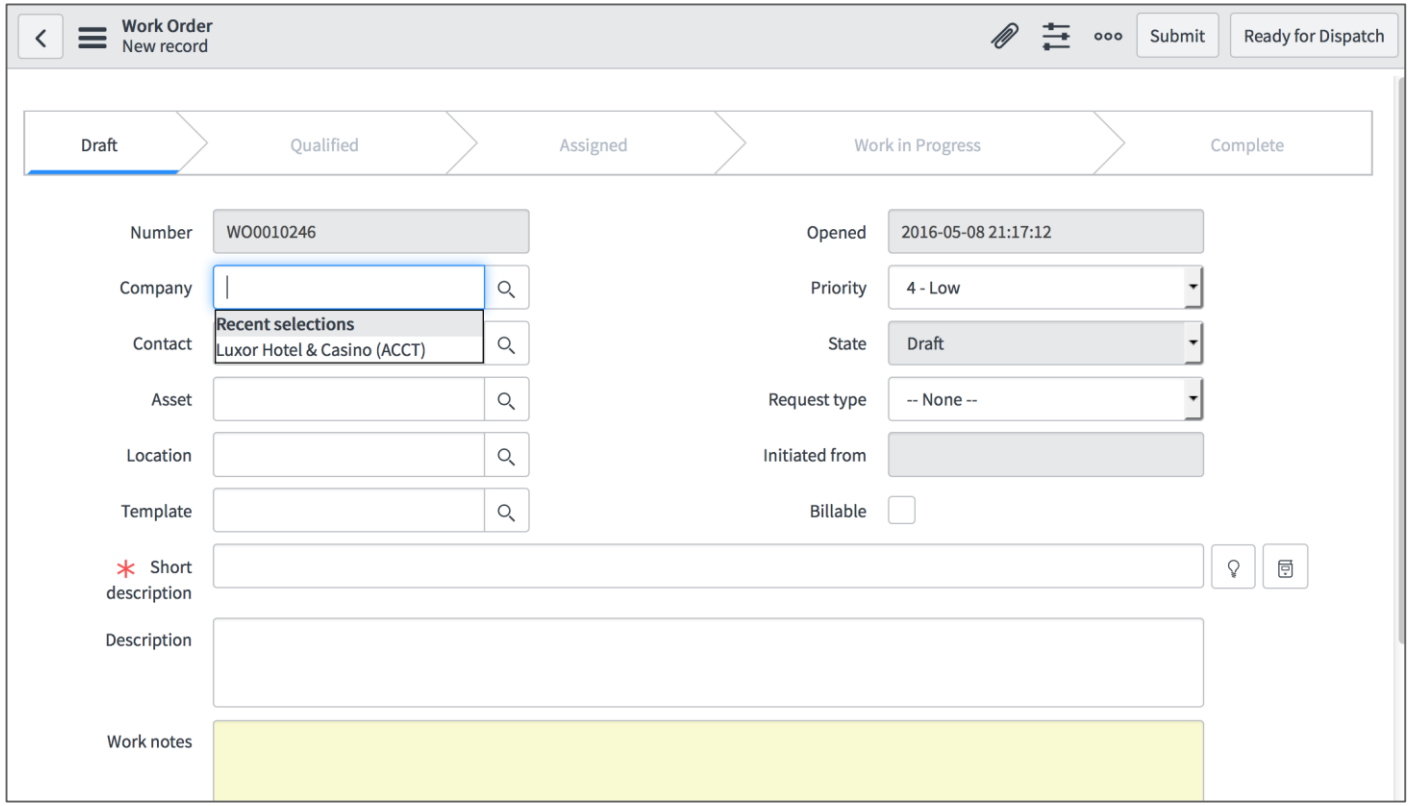
- During this lab we will cover the aspects of Asset Management in relation to Field Services. The objective of this section is purely educational. No configuration changes will be made. When you navigate throughout the dashboard you'll see various representations of asset data – presumably, the assets that are being managed in the field. For example, "Field Assets by Class" organize all the provider's assets (or products).



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Break / Fix

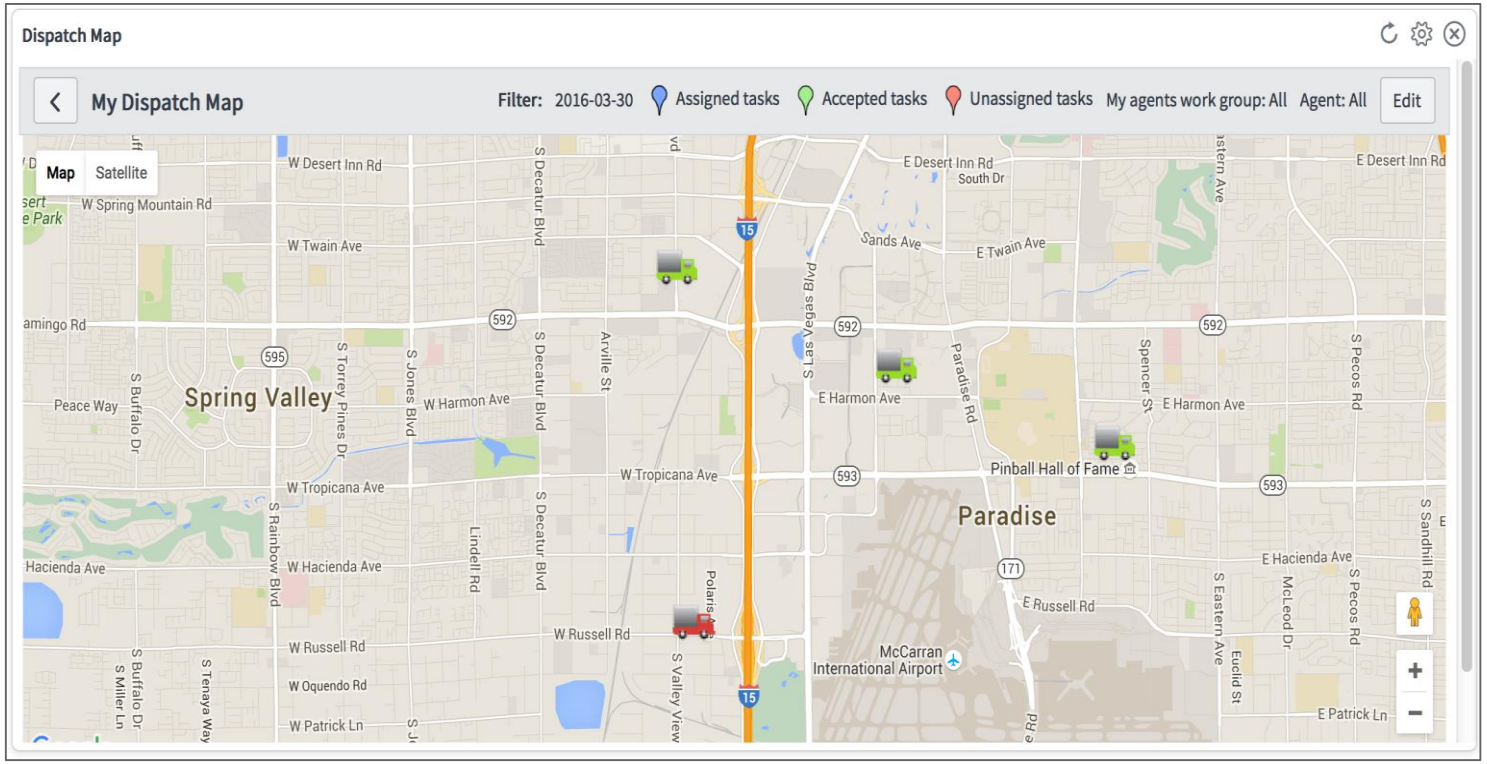
- During this lab we will cover aspects of the initial creation of Field Service work orders. Keep in mind that while work orders can be initiated a number of ways (e.g., through preventative maintenance, self-service), we will be focusing on manual entry to allow you to interact with all areas of the solution that will later be automated.



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Dispatch

- During this lab we will take a persona-driven approach (as dispatcher) to cover the aspects of the Field Service Dashboard, Location Tracking, Work Order Management, Part Sourcing, and Agent Sourcing and Dispatch.
- We will cover multiple methods of dispatch including the map and the new Central Dispatch UI.



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First Half Q & A

Mark Crumpacker
Sr. Advisory Solution Architect
ServiceNow

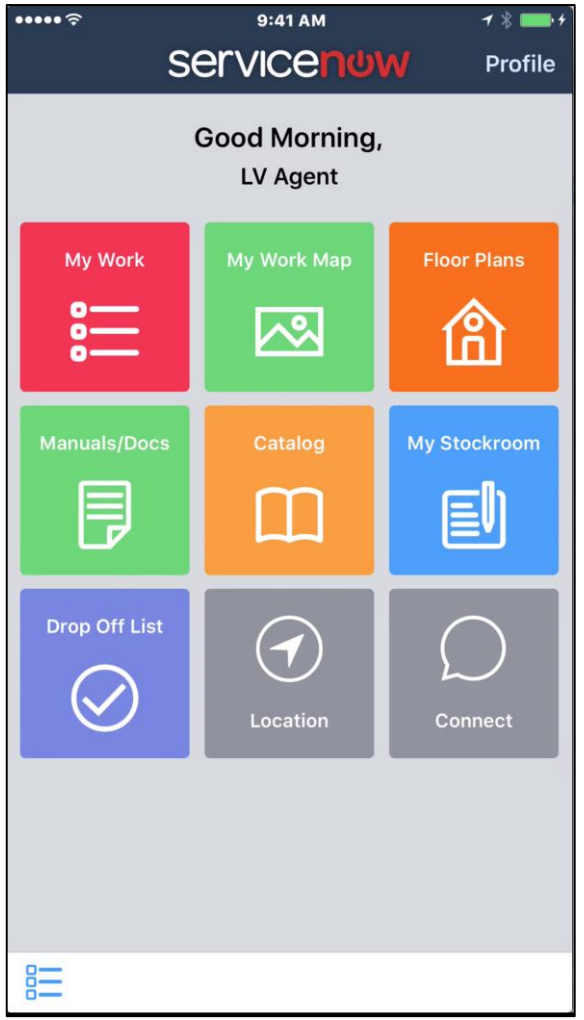
Steve Werner
Solution Consulting Manager
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Mobile

- During this lab we will cover the aspects of Mobility as it pertains to work execution by a field technician.
- This will include the mobile floor plan viewer and geo location capabilities.

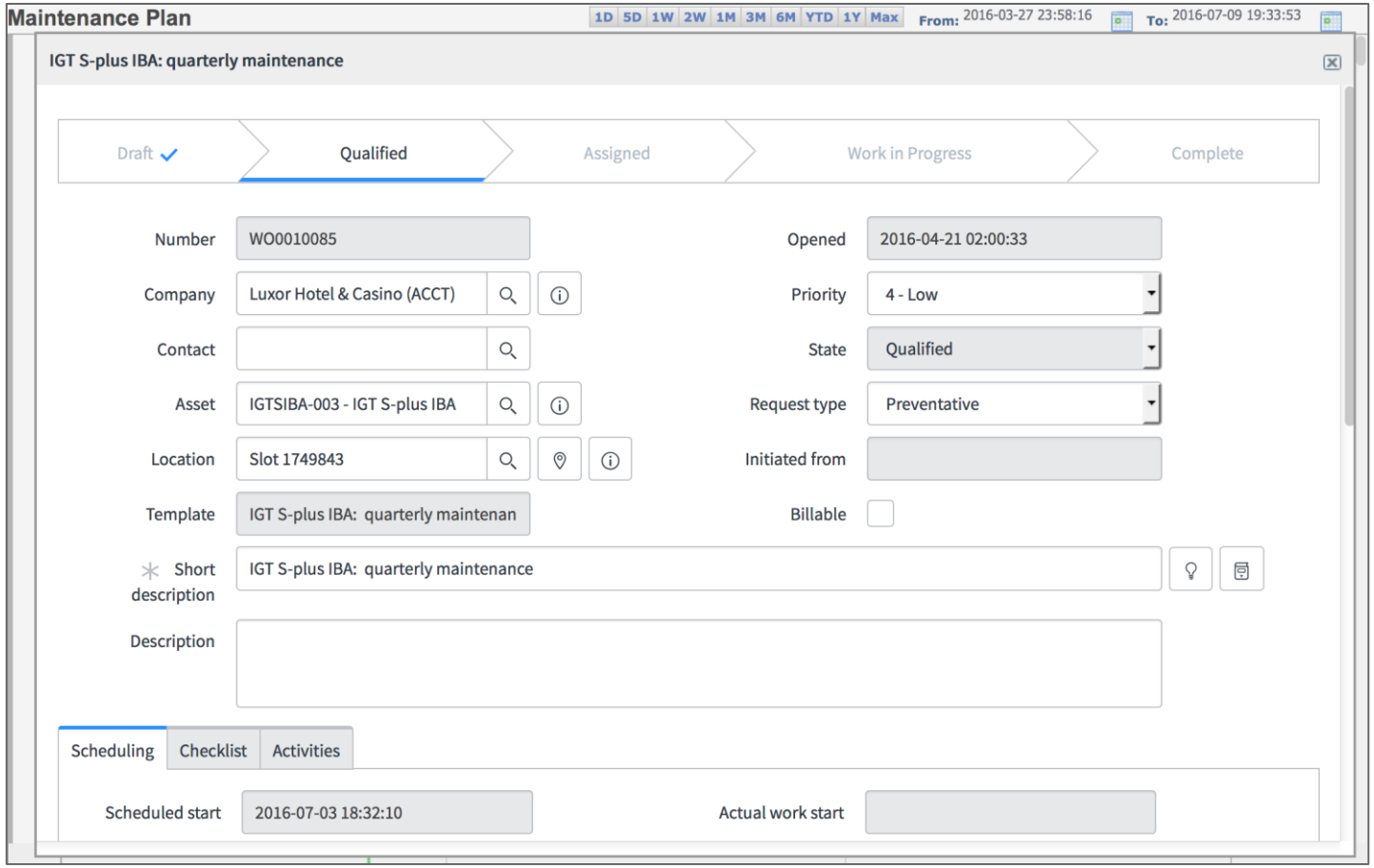
- **Credentials:**
  - **LV_Agent**
  - **LabPass**



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Planned Maintenance

- During this lab we will cover the aspects of Planned Maintenance, using auto-assignment to task agents with work based on their skill, availability, and proximity to the location of the issue.
- This will include the creation and execution of Maintenance Plans and Schedules.



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Q & A

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