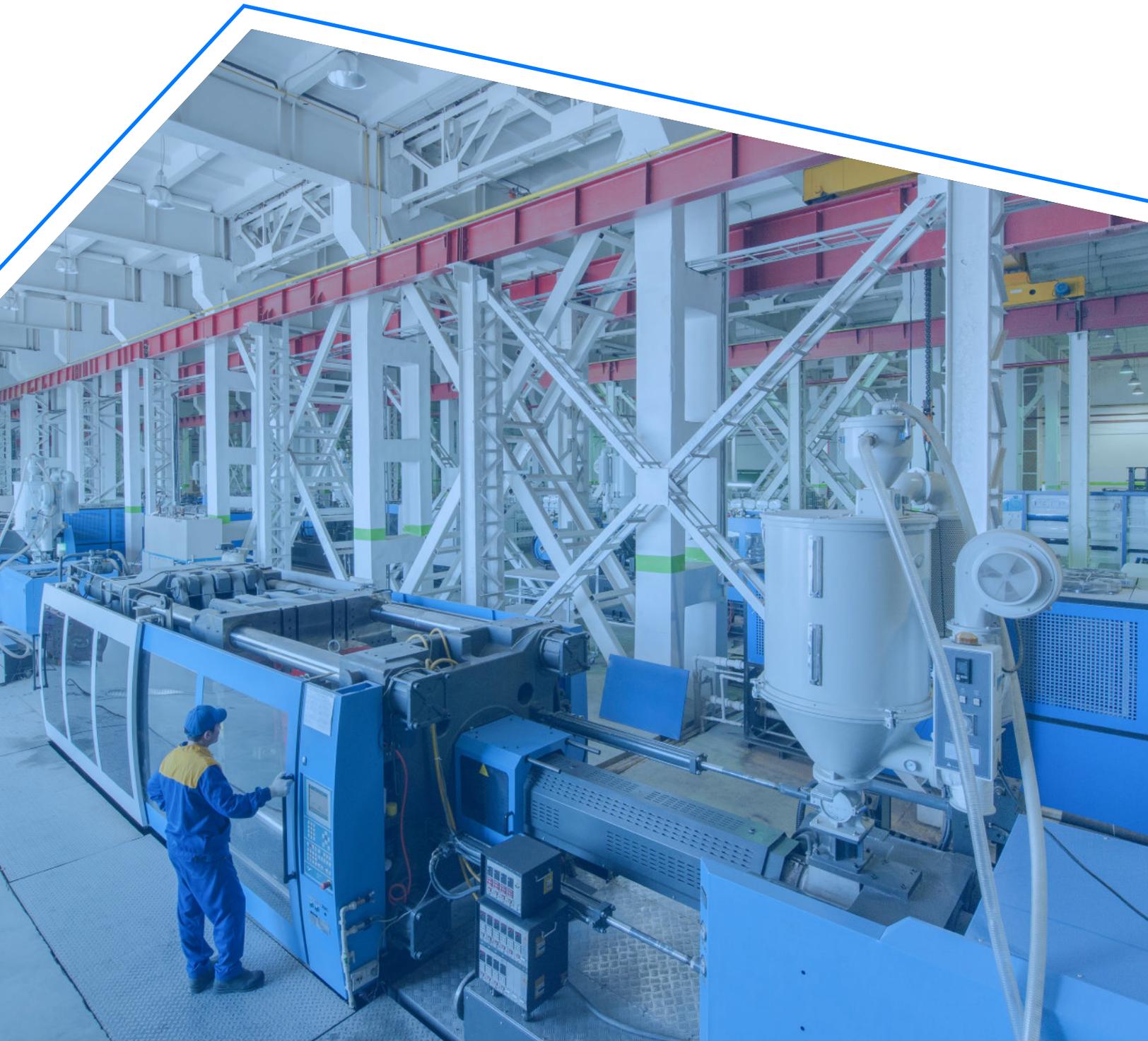




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EVALUATION GUIDE:

THE 7 STEPS TO A SUCCESSFUL FIELD SERVICE IMPLEMENTATION



EXECUTIVE OVERVIEW

How do you ensure a successful field service implementation?

Much of the project outcome is determined by the steps taken before the field service software is even purchased.

MCA Connect has delivered many successful field service projects over the last decade – for manufacturers, oil & gas companies, and service firms. While each implementation scenario is unique, this implementation guide is aimed at delivering the overarching principles that apply to most field service scenarios.

If you have questions or need help, please reach out to our team at:

Solutions@MCAConnect.com

1-866-622-0669

1

CREATE THE VISION

Get clear on project objectives. Successful projects should have no more than 3 overarching goals, and those goals must be compatible with each other. Your organization can create a high-touch, premium customer experience or drastically cut costs and improve operational efficiency.

Your goals might be:

- Improve first-time fix rates
- Empower field service technicians
- Increase revenue
- Improve customer experience

With your high-level goals in place, you'll then start to look at how the field service project might look.

- Are you adding new field service offerings?
- Do you need to change your business model or pricing?
- What's not working today?
- How will this project serve your organization's mission?



2

ASSEMBLE THE TEAM

With any long-term software project, the challenge is finding the balance between keeping key personnel in their main roles or pulling them into the project team. A field service implementation project is no different.

It is vitally important to have a cross-section of seasoned team members participate in the project. Field service touches every aspect of your business – accounting, product development, quality assurance, customer service, human resources, scheduling, sales, marketing – and you need representatives from each department to help formulate the project plan. These representatives should understand the impact these changes will have in their department and have decision-making power. Ideally, they will also act as project evangelists.

In addition to the leadership team, you need the input of the primary hands-on end users. That means getting buy-in from the field service personnel and dispatch team members. People support what they help create. By involving these teams early and often, you can avoid user adoption issues down the road. Remember that they are your first customer, and if the field service software makes their job easier and better, they will embrace it.

At this point, you may also want to hire an external systems integrator and consulting firm like MCA Connect to guide the project to success.

3

MAP THE IDEAL PROCESSES

In an ideal world, how would you like your field service operations to run? One mistake we see is that customers look for improvements, not innovation.

Technology has transformed radically in recent years. Widespread access to the internet has created entirely new possibilities – like deep business analytics, machine learning, remote scripting, and use of IoT sensors. Even when internet isn't available, asynchronous updates are possible.

Rather than improving the current situation, take a moment to step back and envision the ideal scenarios you'd like to create.

MAP THE IDEAL STATE OF YOUR BUSINESS PROCESSES:

- a. Customer Experience
- b. Field Technician Experience
- c. Demand Planning
- d. Scheduling & Dispatch
- e. Invoicing & Expenses
- f. Inventory
- g. Job Routing
- h. Equipment / Assets
- i. Monitoring & Continuous Improvement

Only then do you want to look at the gap between where you are and your ideal future state.

4

SELECT THE RIGHT SOLUTION

As a company who exclusively implements Microsoft Dynamics 365 for Field Service, we don't hide the fact that we're biased towards Microsoft's solution, but you have to pick the software that's right for your needs. On our website, we offer a free field service evaluation matrix.

Today you shouldn't have to get cornered by expensive customizations and continual upgrades. In addition to making sure the field service software has the features you need, you also want to ensure you get a software solution that is:

- Right-sized now, and scalable for growth
- Well supported and continually improved
- Integrated with the rest of your technical environment
- Secure, both in data security features and role-based security settings
- Mobile-ready and modern

You also want to consider the partner you work with for the implementation:

- Have they implemented field service before?
- Do they know your industry?
- Can they support your solution after you go live?

Taking your time to select the right solution will save you lots of frustration down the road. Make sure you understand all the ongoing costs. Some software companies have been known to give great deals in year one, then increase the price over time.

5

COMMUNICATE CONTINUALLY

People resist change. Get users involved early and often. The worst thing you can do is drop the finished project in their lap, give a half-day training and expect users to learn the software on their own.

COMMUNICATION IS THE KEY TO YOUR PROJECT'S SUCCESS.

- Market your field service project internally. Make it a highly visible priority for your company.
- Ask for ideas and feedback every step of the way.
- Make your trainings fun and engaging.
- Turn early adopters into evangelists.
- Monitor sentiment. Understand that some people will always complain, but if you find people are becoming negative or resistant, invest in change management as quickly as you can. Don't wait.

User adoption is critical. If users are happy, they'll quickly get on board.



6

INVEST APPROPRIATELY

Don't shortchange your project. Ensure you've allocated adequate staffing and budget for your field service project. Remember that the true goal is business improvement, not getting the software up-and-running. The more time you spend getting clarity and consensus up front, the more time you'll save during the implementation.

One of the most common software budget cuts is in user training. In field service projects, inadequate training is especially problematic because field service workers can feel abandoned. They're out in the field, in front of customers, under pressure.

You want them to present your company professionally. Mistakes can be expensive to fix. Field service software exists to empower field service workers. Ensure your users have the training they need to perform their job with confidence.

Another area to invest in is business analytics. As information streams in from the field, a business analytics solution can sift through the data to find trends and actionable insights.

7

KEEP IMPROVING

Reaching your “go live” date is an exciting milestone, but it’s not the finish line. You may have initiatives that were pushed to “phase two” – don’t neglect to implement phase two. Your field service software provides a platform to create strategic advantage.

Not only do you want to refine your business processes, but each software update adds new features that present new opportunities. We have a Managed Services group that monitors and evaluates these updates. Someone should be in charge of continual improvement of the system.



ABOUT MICROSOFT DYNAMICS 365 FOR FIELD SERVICE

Dynamics 365 for Field Service is a modern cloud-based platform with built-in analytics that allows you to create an exceptional experience for your customers, while increasing field service efficiency, and adding new revenue opportunities.



Monitor

Manage and monitor client requests and equipment maintenance needs



Schedule

Schedule and dispatch with intelligent optimization



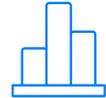
Service

Empower technicians with knowledge about equipment, client, history and agreements



Communicate

Keep clients informed automatically through text, email and portals



Analyze

Use data to continually improve business insights



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ABOUT MCA CONNECT

MCA Connect can provide the right end-to-end solution for your business. By applying industry expertise to Microsoft Field Service technology, we can help you transform your field service operations. With MCA Connect on your team, you'll gain complete visibility, proactively address business challenges and boost customer loyalty.

www.MCAConnect.com

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