



 **Service**
by WORKWAVE[®]

2021

BUYER'S GUIDE

Field Service Software

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Getting **STARTED**

Success in field service depends on winning new customers, providing quality first-time service, and converting one-time jobs into longtime customers. Field service software helps build upon these fundamental principles, reducing cycle time and helping businesses tailor their processes to maximize their operational efficiency. Whether you are strapped for resources, struggling to find new customers, or looking for a way to streamline operations, field service software provides invaluable tools to help earn more profits.

This Buyer's Guide will help you understand the power and importance of effective field service software, how it can help your business, and best practices in identifying what software will best meet your needs.



Having the right software for your business makes all the difference

“ WorkWave Service is allowing me to better position myself for
FUTURE GROWTH
and is greatly

**IMPROVING
CURRENT OPERATIONS.**

WorkWave Service has been there for me on numerous occasions, and continues to service my needs.”

~ Jeff Bromley, The Lawn & Landscape Company

Understanding **FIELD SERVICE SOFTWARE**

The term “field service” is very broad. It is liberally used to classify any business that physically leaves the office to deliver a good or service. Although straightforward, this definition encompasses a wide number of industries, markets, and business models. Given this variation, it may be hard to decipher what exactly field service software is, or what it may look like. To put it simply, field service software helps companies run their day-to-day operations more efficiently. It is designed to give you the tools needed to better service customers, while providing the flexibility to work in conjunction with the way you run your business. Here are some ways these solutions are currently being used to simplify internal processes, win more sales, and provide a higher quality of service:

REDUCE PAPERWORK
CONNECT BACK OFFICE TO THE FIELD
STANDARDIZE PROCEDURES
ACCELERATE INTERNAL PROCESSES
CREATE A CENTRALIZED REPOSITORY
EFFICIENT SCHEDULING
IMPROVE CUSTOMER COMMUNICATION
OPTIMIZE DISPATCHING
MONITOR VEHICLES AND DRIVER BEHAVIOR
ENHANCE MARKETING ABILITIES
MAKE DATA-DRIVEN DECISIONS
REAL-TIME VISIBILITY IN THE FIELD
IMPROVE BILLING/INVOICING
MAXIMIZE CUSTOMER REVIEWS

Choosing the **RIGHT SOFTWARE**

Selecting the right field service software first starts with understanding your business. Finding opportunities to improve your operational effectiveness can help you to recognize the areas in which the right software can help you to run more efficiently. By assessing the processes that drive your business you can identify your company's strengths, as well as the areas in which you can improve to minimize wasted time and resources.

When you boil it down, technology is another investment in equipment. As an investment, software should serve to make work easier, more efficient, and more cost effective. By starting from the ground up, you can eliminate the outside noise and focus on the core objectives that implementing a field service solution should fulfill for your business.

STEP 1 Assess **CURRENT PROCESSES**

Let's start by assessing how you are currently running your business, and what challenges you're working to overcome. Here are a few questions to ask yourself as you start your journey:



What's working?



What's not working?



How do you manage customer information and service history?



How much time is spent creating work orders?



How difficult is it to plan and schedule your team's day?



Are you able to effectively dispatch your workforce?



What level of visibility do you have into your mobile workforce?



How do you receive status updates from the field?



What process is used to reschedule or plan future work orders?



Are you getting paid promptly?



How do you assess your service team's performance?



What systems does your workforce use to manage daily operations?

REMEMBER...

Honest feedback can drive improvement. Engage your workforce to get their input. After all, if you are going to invest time and money into implementing a new system, shouldn't your workforce benefit from that? Having the ability to incorporate technology to simplify their workday is a powerful motivator for staff. By including their input in your selection criteria, you ensure that the software you choose benefits employees at every stage of your business cycle to best improve your operational effectiveness.

Pass along the following questions to the key representatives from each department to discuss with their team and gather feedback on:

What's working in your role?

What's not working in your role?

What tasks take a longer time to complete than you feel is necessary?

- What is the task?
- Task frequency (daily/weekly/monthly)
- How long does it take to complete this task?

STEP 2

Establish YOUR GOALS

Now that you have outlined your current processes and potential gaps, let's prioritize what matters most. Separating the "must-have" requirements from "nice-to-have" requirements will give you a firm idea of what an ideal fit looks like for your business.



What are you looking to achieve by implementing a field service solution?



What are your top three requirements?



What are your workforce's top three requirements?



Do you have a specific software in place today? If yes, where are you looking to improve?



Do you have a dedicated IT resource to implement a new software solution?



How much time are you willing to spend on a new software?



How many team members are you looking to train on this system?



What's your budget?



How much time can you dedicate to training?

Service Businesses by Size - THINKING LONG TERM

Start-up, Micro, Small & Medium Businesses

Don't just think about the here and now; make sure you are choosing a solution that is capable of growing with you. Transitioning from software to software, even just a few years down the road, can be disruptive and time consuming. Pay attention to how this solution will meet future needs.

Large & Enterprise Businesses

Having a unified and standardized way of working is key to accelerating your business. Choosing an end-to-end solution that enables your users to be self sufficient while also giving your company the tools to manage a complex environment is crucial to successful, long-term adoption.

STEP 3

Evaluate YOUR OPTIONS

Having clearly defined your areas of improvement in Step 1 and business goals in Step 2, it's time to see what's out there. By keeping your challenges at the forefront of your mind, you can start to visualize what the right software will help you achieve.

Before you start requesting product demos, do some preliminary research on your options. Evaluate the features and functionalities of each prospective vendor by visiting their website, social pages, and media channels. Take note of any uncertainties or questions you have, then address them when participating in product demos. The following checklist will help capture the key benefits or drawbacks of each software, helping you narrow your search and identify the top candidates.

FEATURES AND BENEFITS	VENDOR 1	VENDOR 2	VENDOR 3
Where does the solution live?			
Are there any specific system requirements?			
Does it offer a mobile application?			
CRM (customer relationship management)			
Work orders and proposals			
Scheduling			
Online service requests (for customers)			
Dispatch board			
Route optimization			
Real-time data			
Billing/invoicing			
Payment processing-in the field			

Choosing the Right Software

FEATURES AND BENEFITS	VENDOR 1	VENDOR 2	VENDOR 3
Accounting software compatible			
Automated customer emails			
Automated customer text messages			
Customer reviews			
Custom Reporting			
Dashboard			
Intuitive design			
Security			
Support - hours?			
Support - is it outsourced?			
Migration/data conversion cost			
Initial setup time			
Onboarding			
Training/resources			
Pricing and packages			

COMPANY BACKGROUND	VENDOR 1	VENDOR 2	VENDOR 3
How long have they been in business?			
Number of employees			
What separates them from the competition?			
Reputation			
Core business			

STEP 4

Selecting the RIGHT SOLUTION

After you've completed your product demos, review the final solutions with your team.

Pay special attention to the success criteria defined in Step 1 and Step 2, and consider:

- Do these solutions adequately address your biggest pain points?
- Is your business currently equipped to implement this solution?
- Is the vendor reliable and capable of supporting your business?

FIELD SERVICE SOFTWARE	PROS	CONS
Vendor 1		
Vendor 2		
Vendor 3		

Looking for some

ADDITIONAL INSIGHT?

See how East Coast-based document destruction company Legal Shred has used WorkWave Service to grow their business into new territories and ensure efficient operations while launching new locations.

[CLICK HERE >>](#)

About

WORKWAVE

For nearly 40 years, WorkWave has been building best practices into its market-leading field service and last mile software solutions to allow best-in-class companies to grow their business, service their customers, and maximize their money. Its solutions empower service-oriented companies to reach their full potential through scalable, cloud-based software solutions that support every stage of a business life cycle, including marketing, sales, service delivery, customer interaction, and financial transactions. WorkWave is a trusted partner for thousands of customers across a wide variety of industries, including pest control, lawn care, cleaning, HVAC, plumbing and electrical, and last mile delivery. WorkWave's award-winning culture and solutions have been recognized in the SaaS Awards, the Cloud Awards, the American Business Awards, the NJBIZ Best Places to Work Awards, and the Stevie Awards for Great Employers.

For more information, visit workwave.com.

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