



Seven Habits of Highly Effective Field Service Organizations

By CSDP



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Introduction:

You have probably read, or are at least familiar with, *The 7 Habits of Highly Effective People* by Stephen R. Covey. Many of these ideas also apply to field service. Below is a list of *7 Habits for Successful Field Service Organizations*.

Habit 1: Deliver proactive service

Wouldn't it be nice to be there before you're needed? This helps increase customer satisfaction and improves your bottom line. Analytics can help here by utilizing information gained from companies with the same products or profiles. For example, say several companies experience a breakage with a certain component of a machine after a certain amount of time has passed or the usage has reached a certain number of cycles. You know this component is expensive to replace, but that it can be repaired much more cost effectively before it reaches maximum longevity and/or usage. Therefore, you can make sure you have aggressive preventative maintenance and proactively service all the companies who have that machine with the component in question before it needs to be replaced. Careful data analysis and proper use of your service lifecycle management software can uncover trends and [ways to differentiate your service](#).

Habit 2: Begin and end with customer satisfaction

Customers with high satisfaction scores retain more customers, experience higher service margins and service revenue growth. However, while many companies collect customer feedback and some use the feedback to take care of immediate concerns, very few companies actually take the information they gather from customer feedback surveys and bring it into their service lifecycle management system to analyze the data, take action, and [close the loop](#) with the customer. By combining customer satisfaction, service, and operational information, companies are able to take immediate action on customer feedback, fix problems, and still address underlying operational issues that may be adding cost or draining resources while also including customer insights and expectations in their management decisions.



Habit 3: Prioritize your contract renewals & process

We work with a lot of companies that have warranty, contract, and other entitlement data in multiple systems that are not connected. It is imperative to connect those systems ([watch case study video](#)) or use a service lifecycle management solution that uses [entitlements](#) as the foundation of the system. You then need to put safeguards in place to be notified when a contract is due and then take action on that notification. Or better yet, utilize service lifecycle management software that will alert you when contracts are due for review (and will continue to escalate if a new contract is not submitted) or can send automatic invoices based on renewal dates, so your service organization will never miss a contract up for review or renewal again. And with the proper contract information readily available, service staff can recognize out-of-contract and out-of-warranty circumstances and sell the client the needed services.

Habit 4: Think mobility

Your field technicians need to have access to your field service software while on-site in order to know the customer's products and services purchase history. Armed with this information, technicians can do things like identify recurring service issues and recommend replacements or upgrades. Ideally, you should take it a step further by setting up what-if scenarios so that if a customer has product A, then an alert will pop up for the technician to discuss corollary product B. Or when a technician resolves certain issues, an alert is sent to the sales/account manager about an [up-sell opportunity](#).

Habit 5: Understand your parts inventory

Did you know that parts planning/optimization accounts for the majority of the service supply chain? You need to be able to [track the repair process](#) from start to finish, as well as give your service team real-time visibility into the location and status of each product or service part, among other things. Good parts planning software, parts inventory tracking, and order planning software will ensure that you always have the correct parts on hand in order to be fully prepared to make repairs at all times. If the service requires a part that the closest technician is without, then you should be able to route a different technician with the correct part to handle the call so that the issue is [resolved the first time around](#).



Habit 6: Synergize your people, processes, and technology

Your people, processes, and technology all need to be working with each other, not against each other. Technology cannot fix broken processes so don't implement new technology before your processes are analyzed and optimized. Your technology also needs to make your people more effective and not hinder processes. Starting with [business process mapping](#) and analysis can help uncover all of your people, processes, and technology issues.

Habit 7: Sharpen your dispatch and scheduling

You need to ensure that service technicians with the right skill set are properly dispatched the first time with the right information and parts. Doing so is critical to both customer satisfaction and service profitability.

Dispatch software tracks service technicians' time, parts, and expenses and gives you automatic alerts and notifications. In addition, you always have [real-time and accurate views](#) of dispatch operations to prevent service dispatch conflicts and you can assign multiple service people to a job when necessary.



About CSDP

CSDP is a services-led software company with solutions that can automate the entire post-sale service delivery and customer service process. We offer:

- An On-Demand Work Flow solution allowing you to make changes 'on the fly' and instantly respond to business and environmental changes as they happen
- Flexible solutions that are tailored to your unique business requirements, instead of trying to force fit out-of-the-box solutions
- A single, unified view of all customer and service delivery operations
- Implementation in weeks - not months

Our clients have realized improved customer satisfaction by up to 15 points, increases in service profitability exceeding 10%, decreased average cost per repair of 50% and increases in first call resolution greater than 20%. We not only help our clients drive down operating and service delivery costs, but enable them to drive up customer satisfaction and increase service revenue and market share.

The Service Relationship Management (SRM)[®] product suite addresses the complete end-to-end service delivery lifecycle including Contact Center, Dispatch/Mobile, Depot Repair, Inventory Control & Management, Knowledge Management, Marketing and Quote Generation, Warranty Entitlement, Training, Contracts/Billing, Reports, Scheduling, and Time Tracking. Our software is fully customized to fit your company's needs and easily integrates with your existing infrastructure so that it implements quickly and begins generating ROI immediately.

CSDP's SRM[®] software solution has been delivered to some of the world's foremost Fortune 500 companies to include IBM, Xerox, Fujitsu, Whirlpool, Rockwell and PSE&G just to name a few.

To learn more about CSDP, visit our [website](#), follow our [blog](#) and join the [Service Relationship Management Group](#) on [LinkedIn](#).

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