



Checklist for Choosing a Field Service Management Tool

If you're a smaller, family-owned-and-operated field service organization, there's a chance you haven't yet invested in a field service management tool. Typically, these tools are in the form of integrative software that tie together different aspects of your business operations. According to published research, only about 2 in 5 smaller field service organizations employ software/tools of this type.

Even though the initial implementation period might leave you feeling a bit frustrated, utilizing an FSM tool will typically save both time and money in the long run. Driving your business forward means maximizing these elements, and FSM tools help with that.

So, if you're looking into FSM software for the first time, here is a checklist of the elements you need to consider.



What is important to your decision-makers?

Different FSM software solutions prioritize different things. Ultimately, whatever you choose should be a tool that integrates different aspects of your business. (More on that in a second.) If the FSM software interface is going to be something that your decision-makers access in order to, well, make decisions about the business, then it needs to reflect what's important to them. Is ease of use of utmost importance? Then you should prioritize a system with the best interface and most intuitive process to use, even if it's not the most sophisticated one on the market.

If your senior leadership team wants quick access to data, then look for an FSM software solution that can quickly pull up and re-sort data in different ways. What you're looking for here is 'buy-in' from senior decision-makers. In other words, you want to know what's important to them and then make sure whatever FSM software solution you choose prioritizes that. (Otherwise, senior managers may start disparaging the system after six months of use -- and that's going to lead to an expensive, hasty pivot to another system.)





Integration capabilities

You don't want to be running from one screen to the next in order to get your work done and keep things moving smoothly in your FSM organization. Essentially, you want everything in the same place. This means:

- Customer data
- Sales information
- Technician contact information
- Scheduling
- Dispatching
- Inventory
- Invoices and billing
- Your e-mail
- Any task management systems you use
- Anything else important to your specific organization



Mobile

Any FSM tool you choose should be mobile-friendly, and it's usually a good idea to have it be mobile-first. Your technicians are almost always on-site, so they'll need something that can be easily accessed from the road. If the mobile experience is clunky or shoddy, your technicians won't use it effectively -- and then the product purchase will begin to lack value.



Customization and personalization

Each field service organization is different. You might use one e-mail system, while your competitor might use another. You want to make sure your FSM software can be customized and personalized to your pre-existing systems. Change is hard, and if you force your entire team to change everything at once, it will be rocky. Having the ability to customize -- and even adjust what resides where on your screen when you log in -- is important.





Adaptability

FSM tools are a multi-year investment. In that time, your business models may shift or new concepts may become more important. You want to make sure whatever tool/software you choose is adaptable without a complete overhaul of the system and processes.



Data visualization and reporting

Whatever the key KPIs of your organization are (they can vary based on the specific field service industry), you want to be able to easily pull them up and organize them visually for different audiences. This will lead to faster, more effective decision-making within your organization -- and that's a big competitive advantage.



Cost

For many small FSOs, this is the number one concern. Remember that a field service management tool is an investment. It pays dividends for years and streamlines your business if you find the right fit. This is one area where spending more might be necessary. Obviously, though, if resources are limited, don't break the bank. Talk with different providers about pricing and cost options relative to where you are and what you can afford.

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- ☐ What is important to your decision-makers?
- ☐ Integration capabilities
- ☐ Mobile
- ☐ Customization and personalization
- ☐ Adaptability
- ☐ Data visualization and reporting
- ☐ Cost

