Putting Field Service Management Software Into Action

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On this site, we often talk about the value of field service management (FSM) software. But if you decide to go through the process of buying FSM software, what are the steps you need to take in order to maximize your return from it? Here's a quick rundown.

Step 1: Decide you want to use FSM software

This normally comes about from a pain point in your business, e.g. reduced revenues, no real profitability, poor communication, unhappy customers, or information not traveling properly. FSM software integrates your business operations in one place and, as a result, it can help with a lot of those problems. The first step, however, is deciding to use it.

Step 2: Research

There are several different ways to go about this, but before you start with anything, you'll need to research these two concepts:

Value add: If you're a small business field service operation (those are the types of companies we work with the most), money is usually tight. You need to understand the value-add of FSM software, which comes from research.

Integrations: You want to make sure whatever FSM software you choose integrates with your pre-existing systems like email or Quickbooks or any project management tools, etc. If the integrations aren't available, either directly or with custom work-arounds, the FSM software won't be as effective because your employees and techs will likely keep using what's already familiar to them.

The easiest way to conduct research is via the Internet, talking to different FSM software providers, and talking to others in field service that you know -- both technicians and back-office employees. You won't truly know how good a specific FSM software is for your business until you start using it, and in the research phase you'll encounter many people who claim their software is perfect. Just try and do the most thorough research you can and talk to people you trust and have worked with before.

If you want a good list of some of the information you should collect in your research, visit this post.

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Step 3: Convince your decision-makers to buy it

If you've done a good job with the research step and have different price points and values/features of each FSM software laid out, this step should be pretty easy. You're essentially going to a manager and saying, "Here are the features for these types of FSM software, and here are the costs associated with each type." For small businesses, the decision is usually made off of that.

[Here's a checklist](#) on convincing your boss about FSM software.

Step 4: Install

This step is fairly logical. It can either be done in-house (by your staff) or the providers of the FSM software can do it for you (which usually relieves some anxiety about the process). The most important step in the install process is actually integration, so we'll break that out into a separate step.

Step 5: Integrate with existing systems

When we say "existing systems," we mean systems such as:

- ⊘ Your email system (e.g. Outlook, Google)
- ⊘ How you manage finance, accounting, and payroll
- ⊘ How you manage inventory
- ⊘ How you store customer information
- ⊘ How you contact technicians when they're in the field

If all of those bullet points were different systems -- say, Outlook for email, Quickbooks for financial management, a different inventory system, and customer information by hand on paper -- then you need to integrate all of those different aspects into your FSM software. The biggest value-add of FSM software is that it puts everything you need to run your business into one place. There's no reason to buy it unless you plan to integrate your pre-existing systems. If you buy FSM software and don't integrate, it's a waste of money. The integrations will save you time and increase your productivity.

If the integrations are confusing to your staff, work with your FSM software provider on this step. It may be a slightly larger cost (usually under "installation fees") but it's worth it.

Step 6: Begin to test

You don't want to roll out FSM software on a random Monday morning with live clients because if issues arise (and they can), you're dealing with actual contracts -- and that could hurt your retention ability. Instead, design a few scenarios in your FSM software. One example would be scheduling a technician. Another example would be updating customer information. Those are simple examples, but do 10-20 of those and then try something a little bit more complicated: pretend there's an urgent call and go through all the steps you'd need, from updating customer info to adjusting schedules to pushing information to the tech's mobile device. Do scenarios like that several times. See where the bugs and issues are as you do it.

Step 7: Continue to test

We'd recommend continuing to test for one to two weeks before you try to roll your FSM solution out live. Make sure all your employees know the system, know what they can and should do within it, and are comfortable with various aspects.

Step 8: Roll it out

Now you can start using it with real clients and contracts!

Step 9: Keep notes on what's good and what's bad

Keep a detailed log of the things that are helping your business -- and the aspects you think could be better. FSM software is a product. That means it's designed, coded, marketed, and sold by people (like us) who have an incentive to make the next version better. Tell us, or tell whoever provides your FSM software, what is good and what is bad. Sometimes we'll design something internally that we think is awesome, and then SMBs start using it and think the interface has flaws. This happens. We get better from your transparency, and then your product gets better -- which helps your business.

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