



Get the Most Out
of Your Field Service
Management Software



On this site, we often talk about the value of field service management software, or FSM. (We sell some of it, yes.) But if you decide to go through the process of buying FSM, 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

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

Step 2: Convince your decision-makers to buy it

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

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

If your senior leadership team wants quick access to data, then look for a FSM software solution that can pull up and re-sort data in different ways both quickly and visually. What you're looking for here is basically 'buy-in' from senior decision-makers: you want to know what's important to them and then make sure whatever FSM software solution you choose maximizes that element. (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.)

Step 3: Install

This one is fairly logical. Typically, during install, you can either choose the "out of the box" option and install the FSM software as it's sold, or you can customize it in some way. Many of our customers tend to customize aspects of the software we offer.



Step 4: Integrate with existing systems

This would have come up in your research (Step 2). You want to make sure whatever FSM software you choose integrates with your pre-existing systems like email, QuickBooks or other project management tools, etc. If the integration isn't available either directly or with a custom work-around, the FSM won't be as effective because your employees and techs will likely keep using what's already familiar to them.

Some of the core business functions you should try to integrate are:

- ✓ 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

Step 5: Begin to test

You don't want to roll out a new FSM tool on a random Monday morning with live clients; 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. One example would be scheduling a technician. Another example would be updating customer information. Those are simple examples, but complete 10-20 instances of those. 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. Roleplay scenarios like that several times. Take note of where the bugs/issues are as you do it.

Step 6: Continue to test

We'd recommend 1-2 weeks before you try to roll your FSM 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 of how it works.



Step 7: Roll it out

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

Step 8: Keep notes on the good and bad

Keep a detailed log of the things that are helping your business -- and the aspects you think could be better. Any FSM 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 whoever provides your FSM, what is good and bad. Sometimes we'll design something internally that we think is awesome, and then SMBs start using it and find ways the software can be improved. We can only improve if you are transparent. And when we are able to improve the FSM you use, it, in turn, helps your business.

Steps 9-keep going: Other considerations

- ✔ **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.
- ✔ **Mobile-friendly or mobile-first:** 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 will need something that can be accessed easily 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.

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

- ✔ **Customization:** Each field service organization is different. You might use one e-mail system, and your competitor might use another. You might use one CRM, and your competitor 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.

If you have any questions about researching FSM software, pricing FSM software, or anything else, [don't hesitate to let us know.](#)



