

FIELD SERVICE MANAGEMENT CHECKLIST

**Not sure what you are needing from your
Field Service Management Software?**

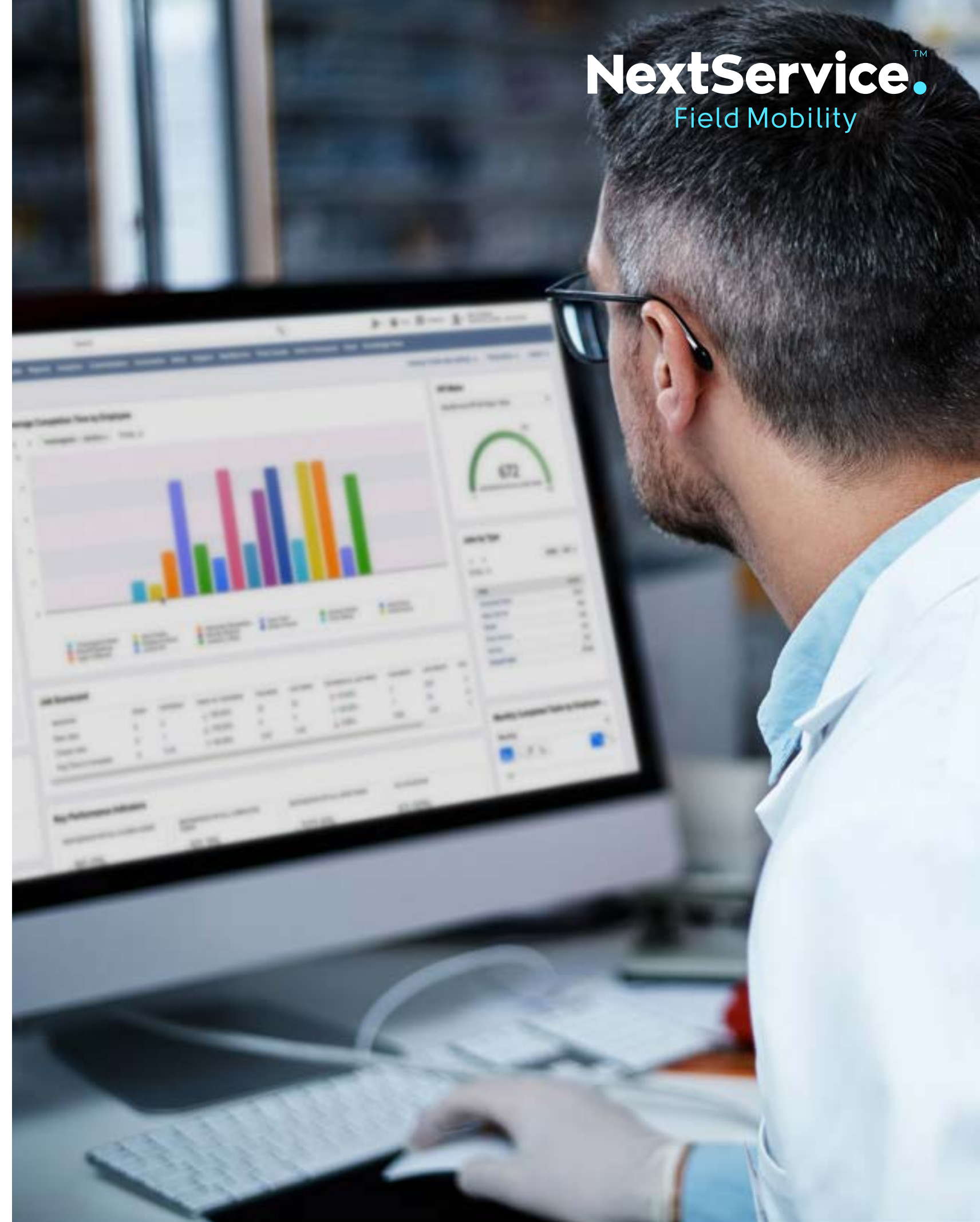
Use our easy to follow checklist to better understand your
business requirements for:

Mobile Work Order Management

Customer Management

Job Scheduling

Field Service Business Intelligence



MOBILE WORK ORDER MANAGEMENT

For a field service business, managing work orders effectively is the key to success.

Requirement	Tick Your Requirement			How Do You Currently Manage This?			
	Required	Nice To Have	Not Required	Not Managed	Paper System	Excel	Field Service Software
<p>Job Status Updates</p> <p>Do you need your system to provide your team with live updates about job status, progress and completion?</p>							
<p>Create Jobs in the Field</p> <p>Do your field service technicians need to create new jobs in the field?</p>							
<p>Job History</p> <p>Do your field technicians need to access location, customer or asset history in the field?</p>							
<p>Notes and Attachments</p> <p>Do your technicians need to records notes, photos or files against a work order record in the field?</p>							

Tick Your Requirement

How Do You Currently Manage This?

Requirement	Required	Nice To Have	Not Required	Not Managed	Paper System	Excel	Field Service Software
<p>Rescheduling Jobs</p> <p>Do your technicians need to be able to book a fixed or tentative follow up visit that needs to be approved?</p>							
<p>Time Capture</p> <p>Do your technicians need to capture time spent on a job, and record this against a work order for utilization reporting and billing?</p>							
<p>Inventory Consumption</p> <p>Do your technicians need to be able to apply van inventory to the job for billing?</p>							
<p>Inventory Look Up</p> <p>Do your technicians need to be able to look up inventory in different warehouse locations whilst out in the field?</p>							
<p>Electronic Checklists</p> <p>Do your technicians need to fill out check lists in relation to the job, such as pre-starts, JSA's or machine data readings in the field relating to a job or work order?</p>							

CUSTOMER MANAGEMENT

Field Service Software can help you provide industry leading customer service.

Requirement	Tick Your Requirement			How Do You Currently Manage This?			
	Required	Nice To Have	Not Required	Not Managed	Paper System	Excel	Field Service Software
<div>CRM Detail Access</div> <div>Do you technicians need to access information relating to a customer in the field, such as contact details, history and notes?</div>							
<div>Customer Notifications</div> <div>Do you need to automatically notify your customers of confirmed service bookings?</div>							
<div>Automated Reminders</div> <div>Do you need to automate reminders for upcoming appointments?</div>							
<div>Customer Feedback</div> <div>Do you need your customers to provide feedback on job completion in the field?</div>							
<div>On Screen Sign Off</div> <div>Do you need to capture customer sign off in the field?</div>							

JOB SCHEDULING

Fast and flexible job schuduling improves customer service and increases visibility.

Requirement	Tick Your Requirement			How Do You Currently Manage This?			
	Required	Nice To Have	Not Required	Not Managed	Paper System	Excel	Field Service Software
Drag and Drop Scheduling Do your schedulers need an easy, visual drag and drop tool to manage scheduling and rescheduling?							
Job and Work Order Assignment Do your schedulers need to assign work orders to available technicians or third party contractors?							
Job History Do your field technicians need to access location, customer or asset history in the field?							
Managing Crews Do you need to assign a job to multiple resources or crews?							

Tick Your Requirement

How Do You Currently Manage This?

Requirement	Required	Nice To Have	Not Required	Not Managed	Paper System	Excel	Field Service Software
<p>Filter Resources by Skill Do you need to filter resources by specific skill sets in order to assign the right job to the right person?</p>							
<p>Filter Resources by Location Do you need to filter resources by location to ensure that you are assigning a job or work order to a technician that is close by?</p>							
<p>Live Technician Locations Do your schedulers need to see on a map the current location of technicians in order to assign jobs efficiently.</p>							
<p>Recurring Jobs Do your technicians need to be assigned to a recurring job at either a daily, weekly, fortnightly or monthly frequency?</p>							
<p>What If Planning Do your schedulers need a way to do 'what if planning' before the changes to the schedule board are committed?</p>							
<p>Mobile Technician Notifications Do your technicians need to be notified when a job or work order is assigned to them, reassigned or changed?</p>							

FIELD SERVICE BUSINESS INTELLIGENCE

Understanding utilisation, job profitability and KPI's.

Requirement	Tick Your Requirement			How Do You Currently Manage This?			
	Required	Nice To Have	Not Required	Not Managed	Paper System	Excel	Field Service Software
<div>Live Field Service Dashboards</div> <div>Do your field service managers have access to live information about work order progress and completion?</div>							
<div>Field Service KPI's</div> <div>Can you easily see your field service departments performance over time with live KPI information?</div>							
<div>Job Profitability</div> <div>Can you see information relating to the profitability of your invididual jobs, teams, locations or work order types?</div>							
<div>Field Service Trends</div> <div>Can you see a live trend of your field service departments performance over time, and compared to previous periods?</div>							

Tick Your Requirement

How Do You Currently Manage This?

Requirement	Required	Nice To Have	Not Required	Not Managed	Paper System	Excel	Field Service Software
<p>Consolidated Reporting</p> <p>Are you needing to be able to see the performance of your entire field service operation, accross locations, subsidiaries or departments?</p>							
<p>Multi-Entity Management</p> <p>Do you need to manage multiple entities within the same field service management solution?</p>							
<p>Drill Down Capability</p> <p>Do you need to drill down to transaction level information from high level reporting and dashboards.</p>							
<p>Alerts, Reminders and Workflow</p> <p>Do you need team members to be alerted when specific things happen in relation to a work order or in general?</p>							
<p>Quick Add Jobs</p> <p>Do you need to be able to quickly add a new job or customer to the system, to be filled out in more complete detail at a later stage.</p>							
<p>Live Job Status</p> <p>Do you need a visual way to see planned, in progress and recently completed jobs or work orders?</p>							