

# Rolling Out Field Service Software? Avoid These Mistakes

Experts clue you in to common mistakes companies make when deploying field service software, and provide advice on how to avoid these mistakes during your rollout.

Anytime a company embarks on a technology deployment, there are lessons learned along the way. It's impossible to obviate every issue and challenge, so you plan well and then learn as you go. However, it helps to be aware of some of the common mistakes companies make when selecting and implementing similar solutions so that you can avoid them during your project. Recently, I spoke with some experts in the field service software space to get their take on these common mistakes and to obtain their advice for how to avoid them.

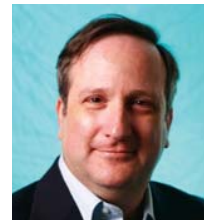
## Mistake #1: Inputting Bad Data

With an automation software, the idea is to reduce the margin for manual error. However, for this to work the way it should, you have to start the project with accurate data. "The key point here is that automation greatly magnifies the implications of bad data," says Israel Beniaminy, senior VP of product strategy at ClickSoftware. He provides the example of technician skill set information. Before automation, if a local team made scheduling decisions manually, erroneous skill information wasn't that big of an issue. The team has excellent implicit knowledge, and therefore skills data was poorly maintained. Now, imagine the first day with the automation software turned on. Tasks aren't automatically scheduled, because — according to the stored skills data — there are no technicians with the required skills. You can take the example of skills data, and plug in any piece of data used in automated decision making — it produces the same issue. "The good news is, it is possible to minimize such issues if you prepare for them," adds Beniaminy.

"Make sure the professional services team on the project has delivered enough successful deployments to know what to expect and how to defend against it. Identify the data that has substantial impact on automated decisions, and determine how to validate it." Beniaminy also suggests running full-scale tests with the solution before going live while using the existing process in tandem to validate that you're getting the results you want.

"The old saying garbage in, garbage out is as accurate today as it's ever been. With a manual system, you have to worry about technicians providing bad data, or data entry clerks inputting incorrect information," says Tony Rizzo, embedded mobile analyst for Antenna Software's Mobile Masters Community. "With a mobile solution, inaccurate or inappropriate data causes a huge impact on your field staff and is a much more common problem than you'd imagine." Many times, solutions are built with either 'bad' data, or simply include too much data that isn't relevant to the day-to-day activities of the mobile worker. When a field worker has to interface with this, it can cause frustration and a resistance to using the solution. "Examine your existing data and the value it provides, interview field workers and ask them what they need to be successful, and focus on the data elements themselves rather than the host systems of record," adds Rizzo.

Another thing to remember is that the issue of bad data extends beyond the initial configuration — automation isn't a fool-proof solution to the issue of users inputting bad data. "It's important for the software solution being used in the field to incorporate field-level validations to make



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sure the right information is being entered. Minimizing the use of 'free text' fields and using more standardized pick lists will ensure that everyone in the organization is using the same terminology and there is nothing left to interpretation," notes Debbie Geiger, VP of marketing at Astea International.

### **Mistake #2: Ignoring The Need For Change Management**

The experts all agreed that one big mistake companies often make is not recognizing the impact of a technology deployment on the organization, and not preparing adequately for the necessary — note: necessary — change management. "Without proper change management, and the right stakeholders committed to the project, odds of that project failing and lack of overall adoption are much higher," explains Geiger. "Don't forget how big of a change moving to mobile applications and devices is for field technicians. They'll need training and support as they adopt the new solution. However, management must enforce the use of such systems, or the adoption rate will be lower. Early inclusion of a team of 'field advocates' and leveraging a 'train the trainer' approach will greatly help user adoption."

Because your deployment will be such a big change for your field workers, it is best to begin communicating with them about the project as early on as possible. "There are issues that are often perceived by the workforce as harming them or their effectiveness, such as reduced autonomy ['I know better than some algorithm what jobs are important'], bureaucracy ['Why does this system force me to fill in all this information when I'm already late for my next assignment?'], and over-emphasis of regulations ['We always ignored this rule, but now the automated system enforces it']. Be aware of these perceived issues, and don't wait for your workers to bring them up — raise the issues first," offers Beniaminy. "Take steps to understand the sources of the resistance, encourage people to voice their concerns, bring representatives from all parts of the workforce into the planning process, and you will be able to fix most issues before committing money and wasting time."

While it is crucial to have the appropriate stakeholders involved in the project from the very beginning, you also have to balance having too many people involved. "You must bring in all of the key stakeholders [field staff, dispatchers, managers, procurement, IT, finance, etc.], and then it's a good idea to ask those people if there's another stakeholder they feel should be involved," says Rizzo. "However, be absolutely ready to make hard decisions around attendance — it does no good to have hundreds of people working on a project if a dozen carefully selected individuals can evenly represent the stakeholders."

### **Mistake #3: Lack Of A Big-Picture Goal**

When companies seek out a field service software solution, it is usually to solve a specific problem or pain point. However, it is important as you embark on your journey to think outside of the immediate need and determine if there are other areas of the business that could use the solution, ways you'll want to use the solution in the future, or how you expect your business to grow over the coming years. In other words, think big-picture. "Larger-scale perspective is incredibly hard to maintain when a manager or team has been tasked with fixing a specific problem, but it is imperative to the success of the company overall. Many mobility projects do, in fact, start with a single pain point. But, focusing on that single pain point alone will almost certainly not provide the vision necessary to create the most effective change," advises Rizzo. "Look across the entire organization as part of the business process analysis stage, and look for all possible interaction points — especially the next set of processes affected once the immediate problem is resolved — to make sure you aren't simply 'kicking the can' down the line."

There's no doubt there is a fine line between a project that misses opportunities to address other areas of opportunity within the business and one that is taking on way too much. "One of the toughest challenges in deploying a business automation system is setting the scope — in other words, deciding where to stop. If you make the scope too wide, the project may be out of your reach in terms of budget and timeline and will carry too many risks," explains Beniaminy. "While 'start small' is a good idea, 'think big and start small' is even better because overly restricting the scope may also lead to failure."

The ability to understand how your solution can impact various parts of your business comes from the level of knowledge you have about how the business works. "In-depth knowledge of how service industry processes work across the customers, call centers, field service, depots, and office functions needs to be tapped to ensure that the field service application chosen fits into an overall business process and can integrate easily with existing systems," notes Geiger. "An experienced partner can help you sort through this data, and can help to develop an integrated strategy that includes business processes, mobile applications, connectivity choices, and hardware requirements."

Avoiding these three common mistakes will put you on the path to success with your field service software deployment. But, there were other valuable tidbits of advice echoed in my conversations with these experts. For instance, taking the fast and easy approach has led to many failed projects. Don't forget about security. And, don't compromise on usability — it is essential, especially in mobile deployments. ●