Putting Pieces of the Field Service Puzzle in the Right Places

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Designing a field service solution can be like putting a puzzle together.

If you've ever assembled a puzzle, you may have followed a formula to guide you in putting the puzzle together. Maybe you grouped pieces by color or by pattern and then went to work to complete specific visual elements. Maybe you put all the "edge" pieces together first, then worked from the outside in. Or maybe you worked in sections, attempting to put the top right part of the puzzle together first, then the bottom right, and so on.

Regardless of how you approached the task and irrespective of whether you had help during the process, in all likelihood you completed the puzzle. It's likely that you spent considerable time trying to put all the pieces in the right place. It's likely that you became frustrated occasionally with the progress you were making and got sick of seeing the unfinished puzzle scattered about on your dining room table. (It's even conceivable that you grew frustrated and put all the pieces back into the box.)

Putting the Pieces of Your Puzzle Together

The Gomocha team has more than 30 years of experience in the field service industry, during which time we have observed that designing, customizing and implementing field service solutions for our customers is a bit like putting a puzzle together.

- We know that that there are dozens (in many cases, hundreds) of moving parts in any given field service organization.
- We know that regardless of the type or size of a field service operation, there are many different departments consisting of multiple stakeholders, each of whom has unique requirements.
- We know that complex activities are carried out every day – and equally complex processes must be followed.
- We know that deadlines and legacy systems need to be considered, and must-have and nice-to-have specifications need to be incorporated into the final result.

Even when organizations are the same size or type or operating in the same industry sector, we've seen many differences in structure, technology and management. No matter the size or type of organization, Gomocha has designed customized solutions to the most vexing challenges in the field, using a step-by-step approach.

If you're wondering how the "puzzle" part of the story works, consider the following:

Step 1: Define the objective.
Have you ever tried to put a puzzle together before seeing an image of the completed puzzle? Probably not, because it would unduly complicate an already complicated task. Similarly, you don't want to implement a new field service solution unless and until everyone in the organization knows up front and in great detail the purpose of scoping, designing and implementing the new solution.

What are the top five goals the organization wants to achieve as a result of a new solution? Overall revenue growth, expansion into new markets, faster invoicing, higher customer satisfaction, higher customer-retention rates? It's essential to draw a picture for everyone to motivate and guide them in later stages of the process.

Step 2: Put all the pieces on the table.
In the early stages of the process, it's essential to conduct a needs analysis to define who wants what, set timelines for when they want to achieve it, and determine who's going to lead the charge. This discovery phase of the process may take some time to complete, but identifying and putting all these pieces "on the table" is an essential element on the path to success.

Step 3: Categorize the pieces.
After painting a picture of the end game that everyone is striving for, defining how many pieces of the puzzle there are, and putting them all on the table, it's important to clearly categorize the roles (or "pieces of the puzzle") that everyone in the organization will play during the design and implementation of the new solution.

When reviewing solution providers, ensure they have processes in place to facilitate seamless communication between the I.T. department and all other departments.
If the flow of information to and from I.T. is impeded, deployment will be delayed.

A New Solution: Requirements, Features and Functionalities

- **SUITABILITY:** Side-by-side operation of old and new systems to test functionality and ease transition.

- **RELIABILITY:** Input and output accuracy/standardization, "error resistant" to prevent incorrect entries.

- **CONNECTIVITY:** Real-time (or near-real-time) connection between planning system and devices.

- **SECURITY:** Single sign-on, data protection, limited access to confidential information by user group.

- **TRACEABILITY:** Availability of current and historical data that's traceable back to user.

- **AVAILABILITY:** Field service app must be in "up and available" status 99.95% of the time.

- **REPAIRABILITY:** Easily and quickly restore system post-disruption with no loss of data.

- **USABILITY:** Easy to learn, adaptable to multiple languages, multiple sessions function simultaneously.

- **CLARITY:** "Process status" indicator visible at all times to avoid confusion.

- **EFFICIENCY:** Device and software performance in dashboard provides real-time insight.

- **STABILITY:** "Always on" status allows updates/adjustments to be made without affecting operation

- **SCALABILITY:** Easy to reconfigure to adapt to future changes in company.

Category 1: The I.T. department.

The I.T. department is in a category by itself. All other departments in a field service organization, and all the stakeholders within each department, are reliant upon and answerable to I.T. Regardless if the I.T. department consists of one or two individuals tasked with the responsibility of finding a new field service solution or it's a team of twenty I.T. specialists leading the search, everyone in the organization – and everyone on the solution provider's team – needs to communicate openly and often with I.T.

Category 2: Other stakeholders.

Every organization has multiple stakeholders whose needs vary according to the department they're in and the role they play within the department. Most stakeholders are concerned primarily with having their own needs met. Stakeholder titles and roles differ from one organization to the next, but they must be identified and grouped together to ensure they are "present and accounted for" before the puzzle-construction process begins.

Category 3: People + Processes + Technology.

If the I.T. department represents the foundation (the most important pieces of the puzzle) and the various stakeholders represent pieces of the puzzle – providing depth, color and texture – the rest of the organization (the people, processes and technology) provides the interlocking pieces of the puzzle that pull the entire picture together. Consider people: what do back office staff and technicians in the field need and want and how will they be trained? Consider processes: prioritize the processes to be streamlined in the new solution in order to reach the organization's overall goals. Consider technology: To what current or future technologies (ERP, CRM) must the new solution adapt?

Step 4: Find a strong, collaborative solution provider to complete the puzzle.

A collaborative, shoulder-to-shoulder relationship between your organization and the solution provider fosters seamless exchange of ideas and produces the best results in the shortest amount of time. "Putting it all on the table" alongside the solution provider – before, during and after implementation – will result in long-term success.

Very recently, our collaborative and puzzle-like exercise worked wonders for a large and integral player in the parcel delivery business whose operation was far flung in all senses of the word (geographically as well as structurally within the organization). Working closely with stakeholders, we identified dozens of characteristics and capabilities that were deemed critical if the customer was to implement our solution.

By helping this customer define the specific objectives of all stakeholders and by guiding them to express their long-term goals for the organization, management realized they had found a true partner and not merely a vendor. We were on site with the customer the day after the contract was signed, ready to roll up our sleeves and start putting all the pieces of the puzzle into the right places.

Solution providers must recognize and give voice to the needs of ALL stakeholders, because they represent critical pieces of the puzzle – providing depth, color and texture – and their "buy in" helps ensure on-schedule (and on-budget) deployment of the new solution.

Examples of Typical Stakeholder Titles

- Manager-Business Unit
- Manager-Design/Implementation
- Director-I.T. Production
- Project Manager
- Manager-Operations
- Manager-Planning/Control Room
- Process/Information Analyst
- Domain/Landscape Architect
- Process Designer
- Project Manager
- Senior Key User
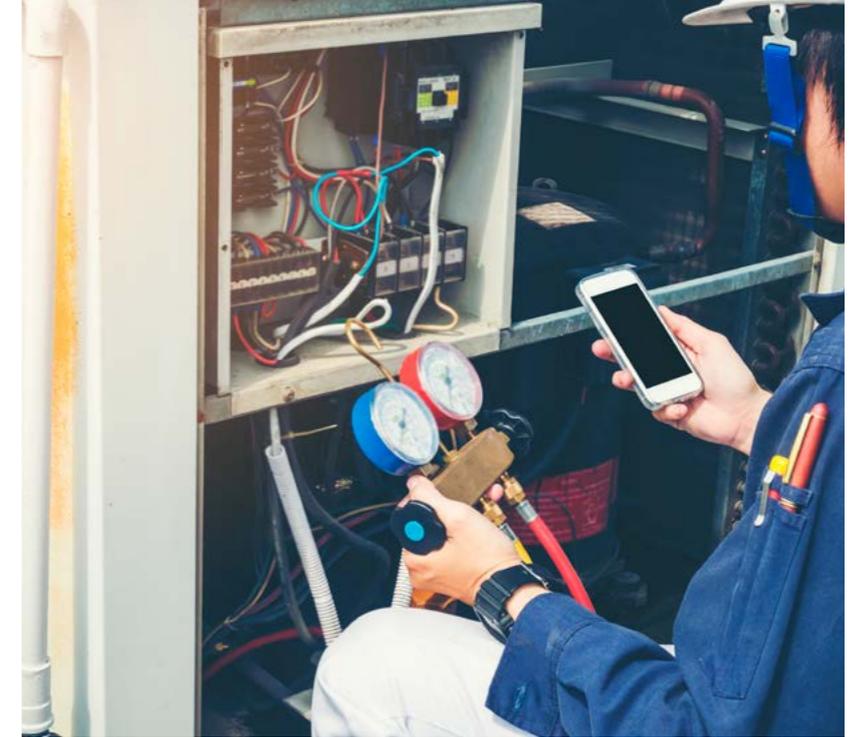
Our Customers Are Our Best Advocates

Other customers have gotten onboard with Gomocha because of our collaborative approach. (Of course, the fact that FMP360 is highly flexible also plays a role!) For example, a coffee delivery company operating in several countries needed a solution that integrated with its AS400-based back office system, and FMP360 "fit the bill." During post-implementation review, they told us:

"Analyzing data gathered in FMP360, alongside your consultants, leads to interesting insights, allowing full process optimization and an ever-growing number of satisfied customers."

Another customer that designs, delivers and services tailor-made packing equipment said they appreciated the fact that we "went deep" in assessing their needs before sending a proposal. Yet another customer – whose 600 field technicians design, construct, manage and maintain healthcare, residential and industrial buildings and building systems – said:

"We're confident about Gomocha and FMP360 now and in the future, because we're invited to participate in scrum meetings, where we give input about designs and functionality that we may want in the future, and we can see demonstrations of the functionalities as they're developed."

It doesn't matter if your organization is a parcel delivery company serving hundreds of locations within one country, a multinational service provider, or a regional distributor of safety and security products; stakeholders in all types of organizations want and need specific features and functionalities in their field service solutions. If vendors under review don't "go deep" in defining objectives, identifying all the pieces of the puzzle and categorizing them – before submitting a proposal for your review – how in the world will they ever deliver and implement a solution that truly meets the needs of all stakeholders?

We Are Problem-Solving Puzzle Masters

We are experts at helping field service organizations do what they do best – in the field and in the back office. Our robust, easy-to-reconfigure and future-proof field service solution, FMP360, is being used by dozens of customers in a wide variety of industries to increase productivity, reduce errors and exceed customer expectations.
If your organization has a puzzle to solve, call 240-403-6001, email info@gomocha.com, or visit gomocha.com to schedule a free, no-obligation demo of FMP360. We'll even customize it so you can see how it will work inside your organization – because that's what puzzle masters do!

A puzzle has many "neutral background" pieces that are essential in connecting colors and patterns and integrating with the foundation to produce the final result. In similar fashion, the people, processes and technologies spread throughout a field service organization are critical elements in the successful implementation of a new solution.

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