Field Service Management Use Cases

Manage location-based work safely and efficiently
Boost customer satisfaction and improve employee experience with digital workflows

Field service is a critical aspect of the customer experience. Whether installing or maintaining equipment, completing repairs, or providing other on-site services, organizations want to deliver exceptional experiences that drive customer satisfaction and loyalty.

The demands on field service in today’s always-on, connected world are changing. Customers not only want more control over when and how they receive service, they also expect it as quickly as possible. The field service workforce wants to be set up for success, with access to all the information and tools they need to complete work the first time. This can be a tall order for technicians who may not be direct employees or may not have a lot of time or experience with the product or service.

Modernization is needed to keep up with these changes and empower both workers and customers to get what they want. This starts with field service management software that can connect your entire organization, so you are all speaking the same language and working from the same information. Automated workflows and easy access to critical information in the field is needed to make teams more efficient and ready to handle whatever changes come their way.

ServiceNow® Field Service Management combines digital workflows, automation, and mobile apps with scheduling tools, asset management, knowledge articles, and more to give field service teams the information they need to deliver exceptional customer service in the field. Organizations can empower field service workers to solve issues and complete work on the first visit, maximize uptime, and improve efficiencies to boost satisfaction.

The following use cases show you more specifically how ServiceNow Field Service Management can help you:

- Solve issues faster to increase satisfaction
- Use preventive maintenance to maximize asset uptime
- Connect field service and IT to get ahead of issues
- Streamline project operations to drive better business outcomes
- Schedule location-based work to deliver exceptional experiences
Fix customer issues faster

When customers have an issue with their products or services, they want it fixed fast. This is easier said than done, as 25% of field service calls require at least one follow-up visit to complete, leaving customers (and technicians) frustrated and dissatisfied.

An inability to fix issues fast can often be attributed to a lack of visibility between customer service and field service and slow, inflexible processes. Data silos and disconnected systems can make it difficult to get a complete picture of what’s happening or access relevant customer histories that could help field service technicians and even customers, themselves, quickly resolve issues. Manual processes add further complications, making vital communications and collaborations spotty and incomplete.

What you need is a common platform that can connect your people, information, and systems to provide more effective self-service and field service operations. This is how ServiceNow Customer Service Management and ServiceNow Field Service Management can help.

Send the right technician to fix issues the first time

ServiceNow Field Service Management integrates with Customer Service Management to help you streamline your service operations and improve experiences for your customers and employees. Automated, integrated workflows help you send the most qualified technician with the right skills, information, and parts to complete work the first time. Self-service capabilities allow customers to find answers and fixes on their own, schedule field service visits at their convenience, and track issue status from anywhere.

With ServiceNow, you can:

- Increase uptime with automated workflows that speed time to resolution and preventive maintenance
- Minimize service costs by sending the best technician with the most relevant background, information, and equipment to fix the issue in a single visit
- Increase visibility with customer service and field service on the same platform to improve experiences and satisfaction

Use case
TRIMEDX

Challenges

- Data silos and disconnected systems made it hard to access the information needed—often stuck in multiple spreadsheets
- An inability to see customer and case status and histories led to long average handling times and poor employee and customer experiences
- Inflexible processes and systems couldn’t address changing needs of business

Solution
Customer Service Management and Field Service Management

Results

- Increased asset uptime with quicker time to resolution and preventive maintenance
- Minimized service costs by ensuring the right technician is equipped to fix issues fast the first time
- Improved customer (and employee) experience and satisfaction

Driving up customer-submitted cases not only delivers a cost-savings for us, but also a better customer experience.

– Doug Folsom, CIO of TRIMEDX
Field service operations workflow

The specific stages and steps for field service operations can vary by industry and use case, but each can be digitalized and automated within ServiceNow. The following is an example for a healthcare provider:

1. **Open request** – A clinical engineering manager at a healthcare provider has been notified of an issue with an MRI scanner that the most recent firmware upgrade can solve. The manager logs into the self-service portal of the clinical asset management vendor and opens a service request with a preferred time of service using Appointment Booking.

2. **Auto-generate work order** – The appointment automatically generates a work order that contains all the tasks needed to complete the upgrade.

3. **Auto-dispatch technician** – Tasks can be automatically assigned to a technician based on their location, skill set, and availability using Dynamic Scheduling. The technician will receive a push notification on their mobile app, which they can see and accept (or reject for reassignment to another technician). Once accepted, the work order is updated.

4. **Maximize efficiency** – With the ServiceNow Mobile Agent app, the technician can access information, including location, equipment, customer history, knowledge articles, etc., to help them successfully complete the task. When the technician is on their way, a text message is automatically sent to notify the customer and includes a link to view a map with the technician’s current location and estimated time of arrival to set expectations and improve the overall experience.

5. **Complete work order** – Once the technician upgrades the firmware and completes the task, the clinical engineering manager can digitally sign and confirm the work order is complete.

6. **Track and audit** – A PDF summary of the signed work order is automatically created, which includes the completed tasks, parts used and returned, incidental expenses, and the time required to complete the work. The PDF is attached to the work order form for tracking and audit purposes. All the data and timelines are also tracked in the work order, which means it’s easy to pull everything needed for trend analysis, reports, and audits to satisfy compliance requirements. Key performance indicators (KPIs) specific to field service are included out-of-the-box for ServiceNow Performance Analytics dashboards.

**6. Provide audit trail**

- PDF summary of work order is available for tracking and audit purposes
- Tracks everything (tasks and data) in work order to support future analysis, reporting, audits, and compliance activity
Maximize asset uptime with preventive maintenance

Keep assets operating as they should to keep your business running

It’s easy to understand why regular preventive maintenance is important. It can keep assets operating as they should to help you avoid costly downtime and repairs and optimize the value of your investments over their useful lifetime. Keeping track of what needs to be maintained and when, however, can be difficult, particularly when the information you need is scattered across multiple spreadsheets and systems.

To ensure effective maintenance, you need a way to track information and get alerts on milestones to ensure critical updates and maintenance aren’t missed. You need to be able to schedule downtime for maintenance when it’s convenient, as opposed to when something breaks, and you need to be able to measure performance to optimize your field service activity. With ServiceNow® Field Service Management, you can do all that and more.

Use planned maintenance workflows to prevent issues

ServiceNow Field Service Management leverages integrated Asset Management to track asset history and schedule maintenance based on regular intervals or usage. With a complete history of customer assets, technicians can make the most of each truck roll for comprehensive service visits that reduce repeat trips. In a recent Forrester Consulting study, four ServiceNow customers saw a 17% deflection of truck rolls through first-time resolutions and preventive maintenance over three years. Using Field Service Management, you can automate your field service operations to:

- Maximize asset uptime and help prevent interruptions to critical operations using Predictive Intelligence to identify and resolve issues before they can become problems.
- Improve efficiency through automated workflows.
- Increase visibility to measure and optimize field service performance.
- Ensure compliance through automatic scheduling and reporting.
- Speed time to resolution with a global knowledge base that puts relevant information at the fingertips of agents and technicians.

Use case
Cubic Transportation

Challenges
- No real-time visibility into asset information
- Manual, paper-driven processes made it easy to miss optimal maintenance windows and slowed progress
- An inability to measure performance made it hard to optimize field service

Solution
Field Service Management

Results
- Maximum asset uptime and fewer interruptions to critical operations
- Improved efficiency
- Increased visibility of assets
- Quicker time to resolution

1. The Total Economic Impact™ Of ServiceNow Field Service Management, a December 2020 commissioned study conducted by Forrester Consulting on behalf of ServiceNow.
Preventive maintenance workflow

The specific stages and steps for preventive maintenance workflows vary by industry and use case, but each can be digitalized and automated within ServiceNow. The following is an example for a transportation company:

1. **Define workflow** – An aircraft maintenance manager sets up a maintenance plan to trigger a diagnostic alert after every 25 hours of flight time. The diagnostic verification must be completed before 60 hours and more extensive checks performed every 200 hours, depending on the aircraft type.

2. **Auto-generate work orders** – When a trigger threshold is met, the maintenance plan automatically creates one or more work orders, utilizing templates that contain the appropriate series of repeatable tasks for each aircraft type. These tasks can be automatically assigned to personnel based on their location, availability, and skills.

3. **Notify technician** – An avionics technician is notified they have been assigned a task. They log into ServiceNow to see and accept (or reroute) the task that needs to be executed to finish the maintenance diagnostic.

4. **Provide comprehensive maintenance** – With integrated Asset Management, the technician can see asset details, such as its subcomponents, as well as its entire service history, including information on what parts need to be replaced or serviced. In addition, the technician can get recommendations, directions, tips from knowledge articles and previous work orders to help complete the task.

5. **Complete the task** – Once the technician finishes the maintenance and updates the task, the next planned maintenance appointment is scheduled and assigned automatically.

6. **Provide audit trail** – All the completed tasks and data are tracked in the maintenance plan records for future reference, so it’s easy to pull data needed for trend analysis, reports, and audits to satisfy compliance requirements.
Connect field service and IT to get ahead of issues

Case Study
ServiceNow Retail Customer

Challenges
• No visibility into field service activities, which leads to inconsistent service levels.
• Field service teams are reactive, not proactive.
• Manual processes consume too much time—technicians are stuck documenting instead of helping customers.

Solution
Field Service Management and IT Service Management

Results
• Increase visibility of assets, technician location, and status to improve performance and productivity
• Minimize service costs by reducing documentation time
• Meet customer expectations with quicker time to resolution

Cut response times and meet expectations

When a customer experiences and reports an issue, the clock immediately starts ticking, and they expect problems to be addressed as quickly as they arise. All too often, this urgency makes organizations reactive, meaning service disruptions are identified after the fact and take longer to resolve. These delays lead to customer dissatisfaction, churn, lost revenue, and even employee morale issues.

To get ahead of issues and meet high customer expectations, you need to know when an internal service or technology is unavailable or at risk of failure so steps can be immediately taken to address and minimize the impact. Unfortunately, manual processes and non-integrated systems create organizational and informational silos that can make it nearly impossible to provide service quickly, efficiently, and proactively. ServiceNow can help unify your service operations to better coordinate and speed responses to issues and meet your customers’ high expectations.

Improve service quality and organizational efficiency

With ServiceNow® Field Service Management and IT Service Management (ITSM), you can consolidate your systems and field service data into a single platform to transform the speed, productivity, and efficiency of your field teams and service operations. For example, if there’s an equipment issue, your staff can quickly create an incident and then initiate a field service work order to get it checked out by a technician, all from one platform.

With ServiceNow, you can:
• Increase visibility with a single platform that provides IT service and field service teams the data they need to be more efficient and productive
• Coordinate and orchestrate IT and field operations with automated, digital workflows that support preventive maintenance, quick issue resolution, and proactive customer notification to reduce calls into call centers and service operations.
• Improve uptime and performance with connected tools that simplify the process, from reporting to resolution, and improve customer and employee satisfaction

Create work orders directly from incidents to boost employee efficiency

Technicians can manage and track work orders from their mobile devices.
Coordinated field service and IT service management workflows

ServiceNow Field Service Management and IT Service Management can be used to digitize and automate workflows for a variety of industries and use cases. The following is an example for a large retail chain:

1. **Open incident** – At one store location, the point-of-sale (PoS) systems are having trouble reading cards. The store manager identifies the issue and uses the Now Mobile app to scan the bar code on the PoS system. This automatically creates and populates an incident, which is assigned to the store support service desk.

2. **Generate work order** – The support team triages the incident and determines whether it requires a software or hardware fix. In this case, the PoS system requires a software upgrade, so the store support service desk opens a high-priority work order directly from the incident with just a click.

3. **Assign a technician** – The work order can be assigned to either internal or external/third-party teams. In this case, the work order is automatically assigned to an internal technician. The technician is notified of the assignment, accepts the task, and starts travelling to the store. The store manager is informed of the technician's expected arrival time.

4. **Comprehensive check** – With the ServiceNow Mobile Agent app, the technician has access to all the information about the PoS system and its history (e.g., inspections, past fixes, etc.), along with relevant knowledge base articles that can help them resolve the issue. Technician will do a thorough maintenance of the PoS system, which helps reduce future issues and travel costs.

5. **Complete work order** – Once the technician completes the work, they will document their work effort, make any notes, and close the work order. The store manager will digitally sign and confirm the work order is complete. This will automatically update the incident.

6. **Track and provide audit trail** – A PDF summary of all the completed tasks, parts used and returned, incidental expenses, and time taken to do the work is automatically created and attached to the work order. All data is tracked in one single platform for future trend analysis, reports, and audits.
Drive better business outcomes for projects

Keep projects on time and on budget with streamlined operations

For a project to succeed, everyone involved needs to execute their task(s) with flawless precision. This is easier said than done, particularly if everyone is working with different information, systems, and processes. Yet, this is how many projects are run today.

Due to disconnected teams and systems, vital data sharing and coordination for projects tends to take place through numerous emails, phone calls, and spreadsheets. This makes it extremely difficult and labor-intensive to orchestrate and track all the moving pieces and different people required for the project, particularly when third-party contractors are involved. This lack of visibility typically generates unnecessary delays and inefficiencies that can lead to overall poor project performance and quality.

What you need is a common platform that can connect all the different people, information, and systems involved in a project, so you can improve and speed project delivery. You need ServiceNow Field Service Management and ServiceNow IT Business Management.

Delivering more efficient and effective project operations

ServiceNow Field Service Management and IT Business Management work together to help you ensure tasks are completed in order and on time to keep projects moving forward and on budget, especially when multiple teams are involved. With ServiceNow, you have a single source of truth that allows you to create, manage, and track project workflows, so you can maximize your productivity and deliver the best results. You can even manage and track the status of work assigned to third-party contractors with Field Service Contractor Management. Your contractors can, in turn, use the Field Service Contractor Portal to manage their responsibilities and assign tasks to members of their own team, making it easy to keep everyone informed and on task. With ServiceNow, you can:

- Improve visibility with a single source of truth that ensures everyone, across teams, has access to the information and status they need to be productive.
- Streamline operations by managing project tasks and work orders on one single platform to increase operational efficiency and on-time project delivery.
- Accelerate project completion by spotting and addressing bottlenecks and automating workflows to scale work.

Results

- Improve visibility with a single source of truth
- Streamline operations to increase efficiencies and on-time project delivery
- Accelerate project completion

Use case

Streamline project operations

Challenges

- Lack of visibility into project operations led to unpredictable delivery and quality issues
- Multiple, disparate tools and systems made it hard for project management and service teams to work together to solve problems and get work done fast
- Disconnected processes made it nearly impossible to track status or measure performance, particularly across projects

Solution

Field Service Management and IT Business Management
**Project operations workflow**

The specific stages and steps for a project can vary by industry and use case, but each can be digitalized and automated within ServiceNow. The following is an example of how Field Service Management and IT Business Management can streamline operations at a communications service provider (CSP).

1. **Create project** – A project manager at a CSP needs to roll out cell towers across the region, so they create a new project workspace using ServiceNow IT Business Management. The project workspace outlines all the tasks that need to be completed, milestones, and KPIs. One task requires a specialized contractor company.

2. **Generate work order** – The project manager creates a work order in Field Service Management for the project task and assigns it to the contractor, who has been set up as a service provider in ServiceNow. The new work order contains all the relevant details from the project task to ensure the contract worker will have all the information needed to complete the task.

3. **Assign technician** – The manager at the contractor company receives a notification that a work order is assigned. They log into the Contractor Portal to assign the task to a member of the team to complete the task.

4. **Complete task(s)** – The contractor technician is notified they have been assigned a task. They can use the portal to source the necessary parts and document the work they perform, as well as submit expenses, requests for parts, questionnaires, and more. This makes it easier for the contractor technician to understand and complete work, leading to improved contractor and customer satisfaction.

5. **Update project** – Once the technician is done, they will close the work order in the Contractor Portal, which will automatically update the project task in IT Business Management. This will ensure streamlined project execution, while increasing business stakeholder satisfaction and creating transparency around investment decisions.

6. **Track and audit** – All the data and timelines are captured in the work order, including the technician debrief, allowing both the contractor organization and the project manager to review and analyze performance data.
Deliver exceptional experiences in the field

Complete work the first time

When work needs to be done at a specific site, it is best for all involved if it is done right the first time. This means a field service representative, in the right location, with the right skills and expertise, needs to be prepared with all the information they require to locate and complete the work. This is true for a technician fixing or maintaining equipment, an insurance adjustor reviewing a claim, a home health care worker administering medication, or an appraiser surveying property.

Unfortunately, many legacy systems can make it extremely time consuming and difficult to get employees in the field the information they need to be successful. Disconnected systems and data silos often obscure visibility to vital customer data and history and create misalignment between customer service and field service. This can lead to frustrating experiences, as work takes more time than it should to complete, and may even require a second visit.

What you need is a common platform that can help you modernize your field service operations and help your employees work more efficiently to deliver great experiences. ServiceNow Field Service Management can do just that, making the information your employees need in the field available, via the Mobile Agent app, so they are set up to succeed.

Connect field service to the people and information they need

With ServiceNow Field Service Management, employees in the field can easily manage and track their location-based tasks, so they can complete their work quickly and satisfactorily. The Mobile Agent app provides employees with an intuitive, native mobile app for iOS or Android, plus offline access that keeps them connected to the information they need to get their work done in a single visit. With access to work order information, directions, parts locations, knowledge base articles, safety checklists, customer history, and more, employees can complete tasks faster and more efficiently. Workers can also update their task status, record notes or photos, and complete questionnaires to provide additional information to further streamline the experience. With ServiceNow, you can:

- Deliver seamless customer service by keeping customers informed and completing work in the first visit.
- Improve employee experiences and satisfaction with access to maps, workspaces, and dashboards that help streamline assignments and increase efficiencies.
- Speed time to resolution by connecting field service with other teams and mobile tools to help them quickly respond to work order tasks to meet service level agreements.
Location-based scheduling workflow

The specific stages and steps for scheduling location-based work vary by industry and use case, but each can be digitalized and automated within ServiceNow. The following is an example of how Field Service Management can help claims adjusters efficiently investigate insurance claims.

1. **Open a claim** – A customer of an auto insurance company gets in an accident and calls to file a claim. The customer service agent opens a claim in ServiceNow Customer Service Management and uses the integration with Field Service Management to offer available time slots for a claims adjuster to go out and review the damage to the customer’s vehicle. The customer chooses their preferred time of service, and the agent books the appointment as part of the claim.

2. **Generate work order** – The appointment triggers a work order with a template, which contains all the tasks the adjuster must complete for this type of claim, as well as details from the claim the adjuster will need to make their assessment.

3. **Auto-assign adjuster** – ServiceNow Dynamic Scheduling automatically assigns the customer’s appointment to a qualified adjuster, using a set of easily configurable rules that can include an adjuster’s skills and location. The adjuster receives a push notification about the assignment on their mobile device. They review the information and accept the claim appointment.

4. **Travel to the site** – The adjuster uses the Mobile Agent app to get exact details about the claim, including customer and claim history. When ready to leave, they click on ‘Start travel,’ which immediately sends a notification to the customer that the adjuster is on their way with a link to the adjuster’s current location and estimated arrival time.

5. **Complete work** – The adjuster reviews the damage, taking notes and photos within the Mobile Agent app to document the claim for processing. The information documented by the claims adjuster is automatically attached to the claim’s work order and becomes available back at the office for payment processing. While the customer’s claim moves to the next stage, the adjuster continues to the next customer appointment, providing a faster, more efficient experience for customers.

6. **Track and audit** – All the data and timelines are captured in the work order, eliminating the need to manually pull that information when needed for reports, analysis, or audits.
Learn more about managing location-based work safely and efficiently at servicenow.com/fieldservice.