HOW TO ELIMINATE CHAOS AND INEFFICIENCY IN YOUR SERVICE BUSINESS

Presented By:

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WEBINAR AGENDA

Learn how the right mix of people, processes and technology can effectively position your service business for rapid growth and increased profits.

- **Avoid most common sources of inefficiency**

- **Solve the most common service management problems**

- **Technology best practices and the value they deliver**

"Service, when managed properly, can help specialty contractors drive consistent revenue and profits."

About MSI

18+ years in this space   **Deep mobile and service expertise**

Vision: to provide enterprise mobile and field service management solutions
with an easy to acquire, easy to deploy model that delivers rapid return on investment.

- Field Workforce Automation Software
  - Our software helps companies increase field workforce productivity:
    - Field Service
    - Inspections
- How We Deliver
  - Native mobile applications
    - Write once, Deploy on iOS, Android
  - Rapid implementation

About Viewpoint

VIEWPOINT
CONSTRUCTION SOFTWARE®

35+ years in Construction, 28 countries

ERP & Service expertise

<u>**Vision**</u>: We are committed to providing the most advanced and easy-to-use management software for the construction industry and that commitment, combined with their culture of innovation and collaboration, has created a software platform that can help construction professionals across all areas of operations.

- **Service Management Offerings**
  - Our software helps companies increase field workforce productivity:
    - Service Management: WOM, Agreements, Dispatch
    - Project Management, Accounting, Estimating, Collaboration
    - Field Management

- **How We Deliver**
  - Native mobile applications
    - Write once, Deploy on iOS, Android, Windows
  - On-premise or Cloud back office

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WHO USES VIEWPOINT AND MSI?

- Contractors performing field service work, such as installs, repair, maintenance and inspections:

Mechanical / HVAC

Electrical

Fire Protection

Roofing

Poll Question:

What type of work do you perform in the field?

- **Mechanical**
- **Electrical**
- **Roofing**
- **Fire Protection**
- **Other**

COMMON SOURCES OF INNEFFICIENCY

COMMON SOURCES OF INNEFFICIENCY

Data Silos

The Blind Spot

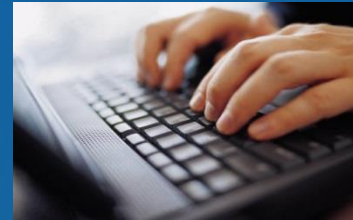The Return Trip

Slow Billing

Long ETA Windows

Unproductive Time

Duplicate Data Entry

Customer Experience

WHY DO THESE PROBLEMS EXIST?

Paper in the Field

- Most Common Method of field reporting

- Most Problematic Method of managing business

How are you handling daily field reports?
(Respondents could only choose a single response)

Written Form	52%
Spreadsheet	18%
Online Cloud Application	12%
Web Form	10%

Which type of content is most difficult for your business to manage effectively?
(Respondents were allowed to choose multiple responses)

Email	12%
Microsoft Office Files	26%
Scanned Documents	26%
Job Site Photographs	23%
Paper Files	**50%**
Accounts Payable Documents	23%

Viewpoint Technology Survey 2014

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Poll Question:

What method or methods of field reporting do you use today?

- **Written report (paper)**
- **Spreadsheets**
- **Web Form**
- **App**
- **Other**

USE OF MOBILE DEVICES

Devices in the Field
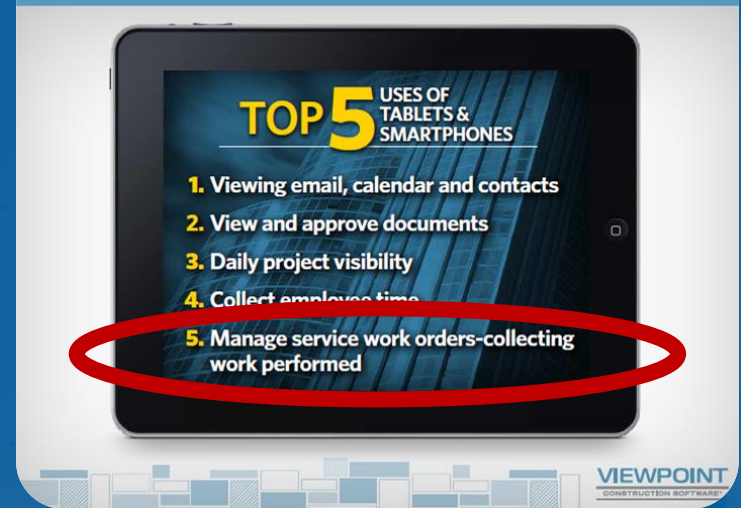
Viewpoint Technology Survey 2014

WHY ISN'T MOBILE BEING USED FOR SERVICE?

BARRIERS TO MOBILE TECHNOLOGY

17

RESPONSE	FREQUENCY
Cost of devices	40%
User resistance to learning new technology	36%
Haven't found suitable software to make it worth it	36%
Cost of software to install on the devices	24%
Low return on investment (ROI)	20%
Security concerns	16%
Other	16%
Dependability/Reliability	12%

SOLVING SERVICE PROBLEMS

- "Back Office" service management

- Scheduling / Dispatching application

- Mobile app for work orders

- Service reporting and analytics

Back Office

Dispatch

Mobile

Reporting

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SOLVING SERVICE PROBLEMS

Data Silos

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Back Office

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Mobile

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TECHNOLOGY BEST PRACTICES AND THE VALUE THEY DELIVER

VALUE PROVIDED: ROUND TRIP WO EXAMPLE

BACK OFFICE

Gain process efficiencies ;

Call to quote, quote to order, close out to bill

Increase response time to customer s

More detailed tracking of everything you service

Bill for all types of service

SCHEDULING

Constant, real-time view of field activity

Improved first time fix rate

Reduced travel time

Increased billable utilization rates

MOBILE

Get paid faster

Increase ratio of field office workers

More informed techs with access to history, parts

Eliminate the need for duplicate/triplicate data entry

REPORTING

Simplify performance tracking

Productivity – how many WOs /day/week/month

Quality & ETA compliance

Profitability overall of service business

1   **2**   **3**   **4**

Take Call
Create W.O.

Schedule W.O.
Assign to Technician

Complete W.O.
with Mobile

Invoice W.O.

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KEY TECHNOLOGY BUYING CRITERIA

- Ease of Use

- Integration

- Working Offline

- Workflow
  (ie; addresses
  our work)

FIGURE 06: MAIN CONSIDERATION FOR NEW TECHNOLOGY

Ease of use for employees

Integration to current systems

Total cost of ownership

Top 3 selection criteria:

1 Ability to integrate with current back office systems

2 Ability to work untethered/without connectivity

3 UI/ability to map to workflow

72% have trouble with wireless connectivity

Mobile Field Service for iOS and Android

Back Office

Dispatch

Mobile

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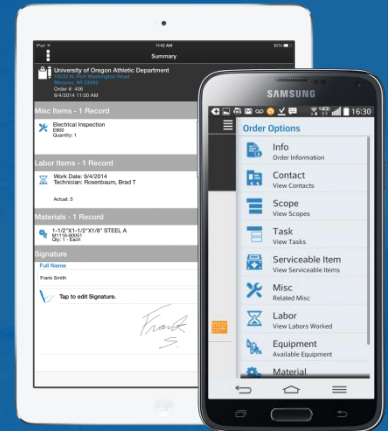
Round Trip Work Order
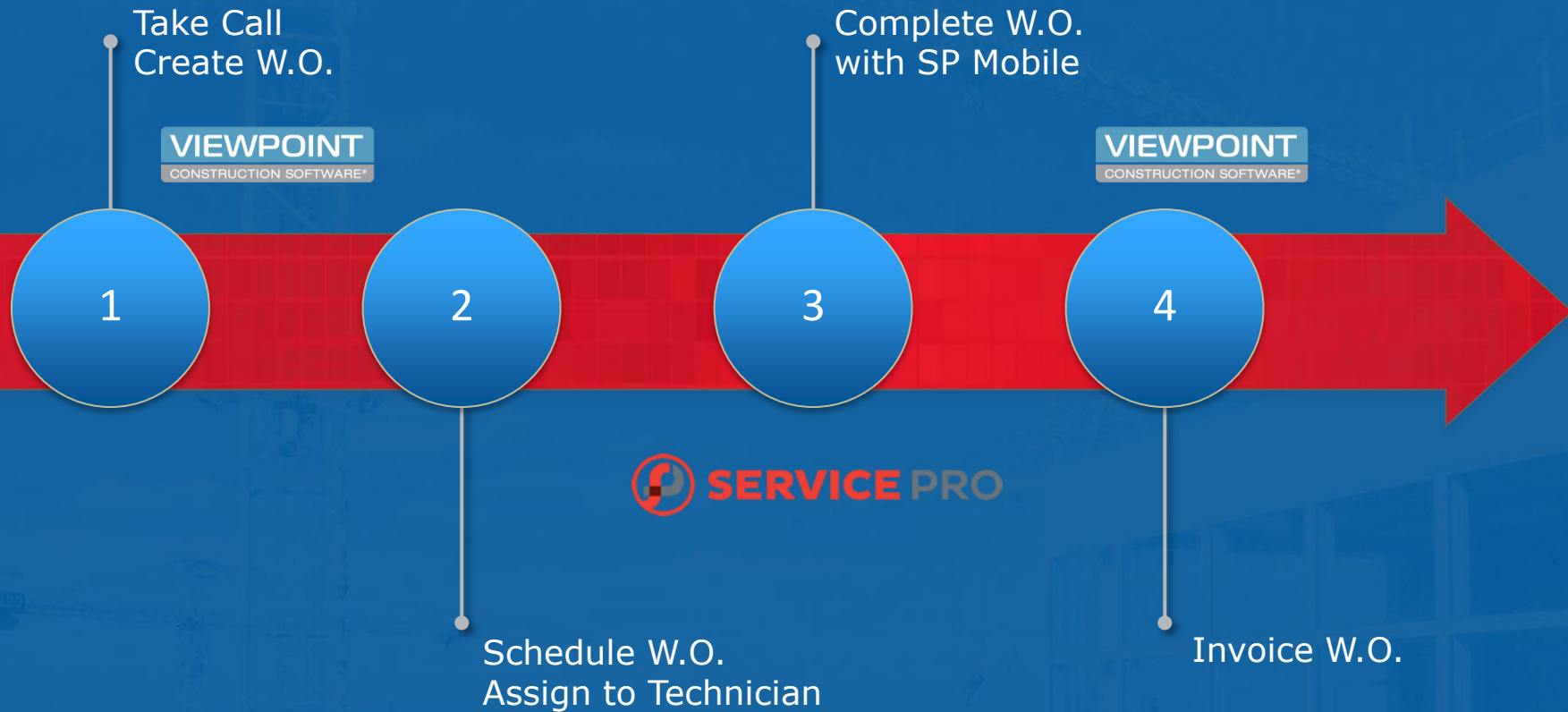
Questions?

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