

3 Best Practices

in Field Service Management
for Security Integrators



***sim*PRO** 



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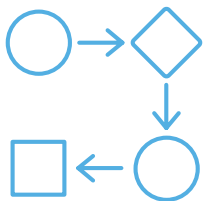


What is field service management?

Field service management refers to the ways a business organizes and manages their resources in the field. The processes used for business operations from calculating job costs to sending out the final invoice, and everything in between, all fall under the field service management umbrella.

As a security integration business, good field service management processes can be the difference between just barely staying on top of operations or scaling your business, increasing profits, and beating the competition.

Building efficient field service management processes takes time and effort, but it is well worth the investment. **Three best practices for field service management include:**



Use workflow automation software to clean up inefficient processes



Improve communications to better meet customer expectations



Generate intelligent reports to make better operational decisions



Best Practice #1

AUTOMATE YOUR SECURITY BUSINESS PROCESSES

In field service management, automation is the act of replacing manual and paper-based processes with self-operating processes through technology. Automating the processes in your day-to-day workflow can increase business efficiency by helping you work smarter, not harder.

Say your security technicians are manually recording job details and part numbers on paper. This could mean that necessary information goes missing, office staff might spend extra time deciphering notes, and data is entered twice (once by the technician and again by the administrative personnel for billing and invoicing).

An automation software with desktop and mobile features will:

- Eliminate double entry as technicians can enter job details into the system, on site
- Decrease the chance of errors in transferring information from job notes to invoice
- Increase billable hours by freeing up time once spent deciphering and transferring information

From estimating to invoicing, each step of your security business operations can be automated.



Scan incoming communications



Automatically create jobs



Assign field staff to jobs



Alert customers that help is on the way



Invoice the completed job with a few clicks



Accept payment through the customer portal



Best Practice #2

IMPROVE CUSTOMER COMMUNICATIONS

No one wants to be left in the dark; especially not customers who have invested money in your services. The more clarity you provide in your communications with customers, the more they will feel confident in the services you provide.

Three ways to use technology to enhance communication with your customers

- 01** Create digital estimates, service agreements, invoices, and other customer-facing documents. Digitizing your documents allows you to generate content and send it to customers faster. It also helps create a consistent brand look-and-feel, and help you stay on top of what was sent and when.
- 02** Use online customer portals to make communication between your customers and your office easier. Many software platforms provide features not just for your employees, but also for your customers to request estimates, view job status, and pay invoices. This makes life easier for your customer and for you by cutting out unnecessary calls.
- 03** Send automated notifications, like SMS messages, directly from your office to your customers to send reminders about upcoming payments or to notify a customer that a technician is headed to the job site.



Best Practice #3

MAKE DATA-DRIVEN DECISIONS WITH REPORTING TOOLS

The more information you have, the better informed your decisions. A simple way to gather information is to generate intelligent reports. Collect data from the day-to-day to discover trends and get a better idea of productivity. When your reporting is built into a larger field service management software solution, you can automatically create reports based on data in your system. You can also set automation rules to receive scheduled reports at specified times.



Financial Management Reports

Do you know which of your service, project or ongoing maintenance jobs were the most profitable in the last year? Can you forecast your expected sales for the upcoming year? Use reporting tools to receive a clear understanding of where you are making and losing money and how your business stands, financially.




Workforce Management Reports

Can you quickly determine how many hours were spent on a job against how many hours you billed? How efficient are your security technicians when it comes to service work? Reporting can help you determine the level of productivity of your team so you can make necessary adjustments.



Project Management Reports

Do you have a clear picture of the current status of your projects? Once again, reporting comes in handy by providing that additional visibility and clear translation of your data into actionable information.

A black and white photograph of a security camera mounted on a building facade. The camera is a white, cylindrical, bullet-style camera with a mounting bracket. The building facade consists of horizontal slats or louvers, creating a strong geometric pattern. The camera is positioned in the lower-left quadrant of the image, pointing towards the right.

Explore software
to help you
achieve these
field service
management
best practices

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