FIELD SERVICE MANAGEMENT

OVERVIEW

- Field Service Management Overview
- FSM Lifecycle
- Work Order Initiation
- Work Order Qualification

FIELD SERVICE MANAGEMENT OVERVIEW

- Field Service Management (FSM) is an application that enables you to manage work orders and related tasks, resources, skills, assets, and locations
- We can use the FSM application to manage work requests that are performed on location by field service agents
- Used for problems that require on-site services from field technicians
  - EX: an internet service provider may need to send field agents to locations to install routers/modems or to perform some maintenance to fix a problem
- FSM lets us connect teams, processes, and systems to find the root cause of issues and resolve them in a timely manner
  - NOT to be confused with Problem Management! FSM is an entirely different application with many different features and a different lifecycle

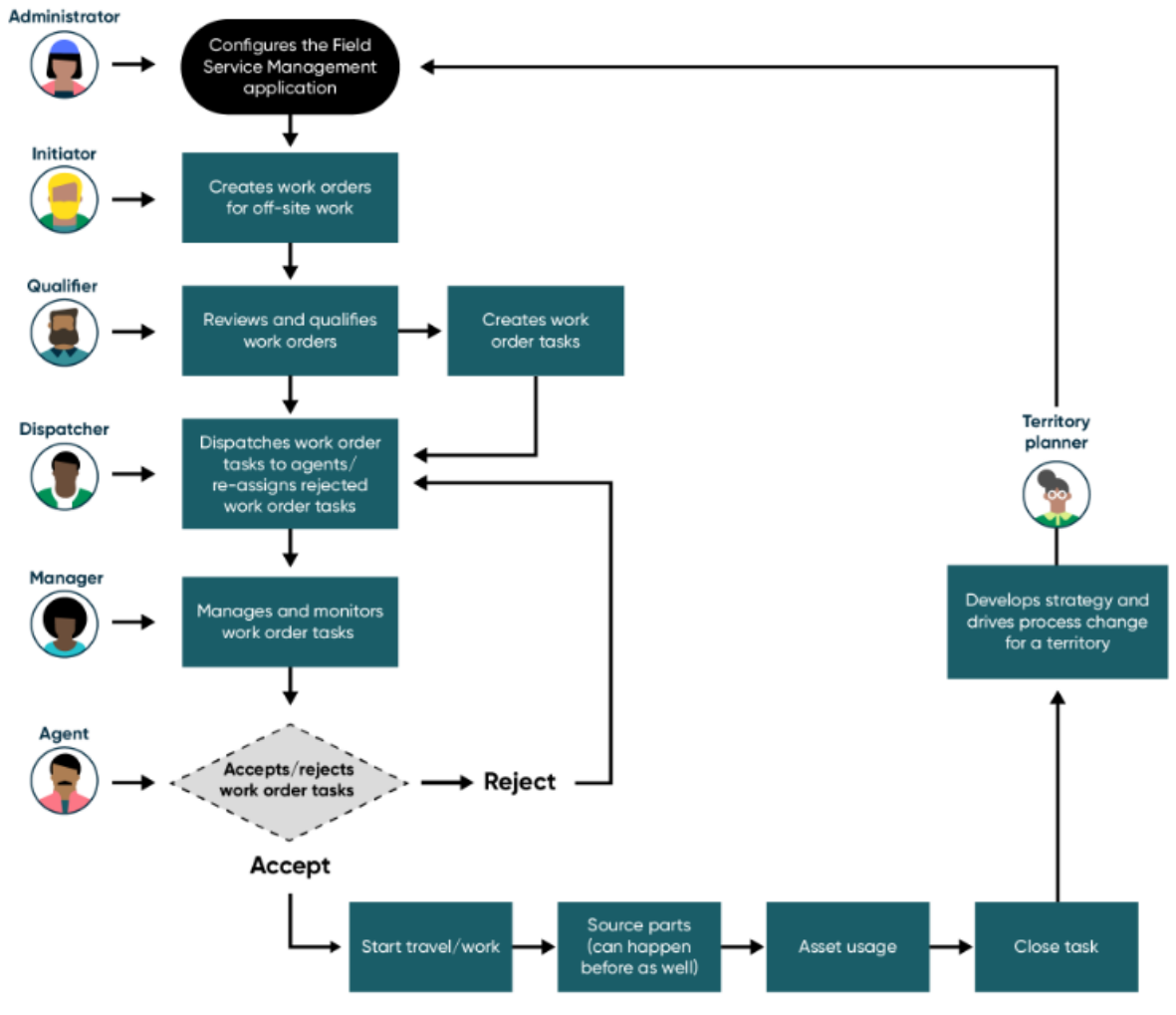
BENEFITS OF FSM

- Simplified setup using low-code plugins and guided setup
- Optimize task scheduling, auto-assign tasks, and adapt to changing conditions
- Automatically capture critical data when creating a work order from a case, incident, problem, change request, or project task record
- Empower customers using the Field Service Management – Customer Experience to track en-route agent location and arrival time
- Find an analyze work orders with similar underlying issues using Predictive Intelligence
- Give dispatchers everything they need in one place to make smart and fast scheduling decisions
- & so many more!!

FSM USERS

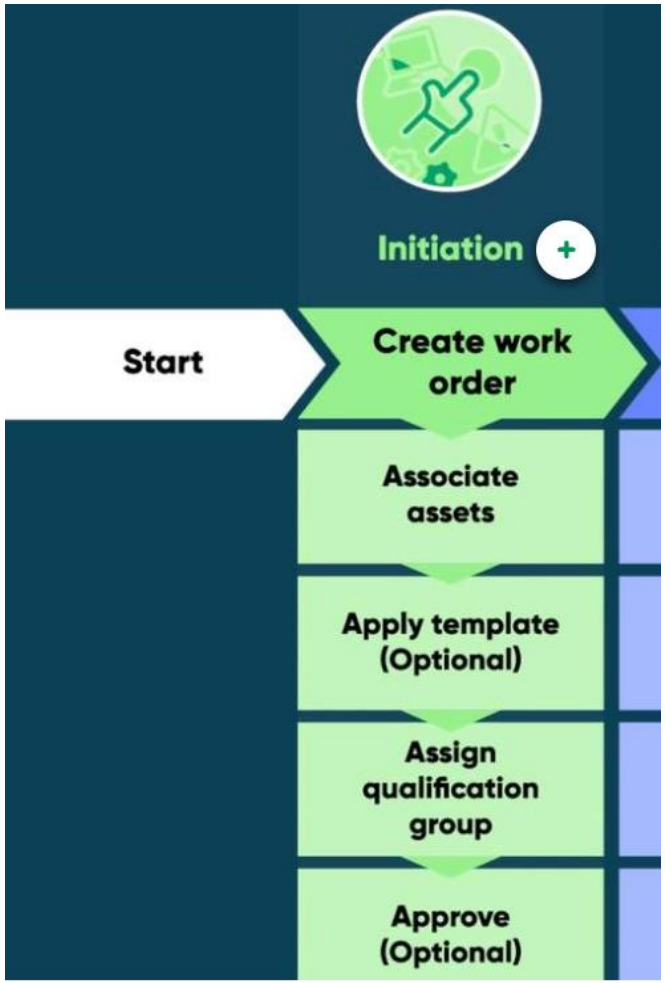
- Administrator – configures the FSM application to automate the process of assigning work order tasks to field technicians
- Initiator – creates new work orders or can create work orders from other record types (such as problem, incident, change, or project task)
- Qualifier – reviews and qualifies work orders to ensure that the work order tasks are created
- Dispatcher – assigns the work order tasks to the most appropriate and available agents; also tracks agent's travel and work time, part requirements, and asset usage
- Manager – manages and monitors the progress of work order tasks and can reassign tasks to other agents
- Agent – travels to the customer location with the required parts and skills to work on the assigned task

FSM LIFECYCLE



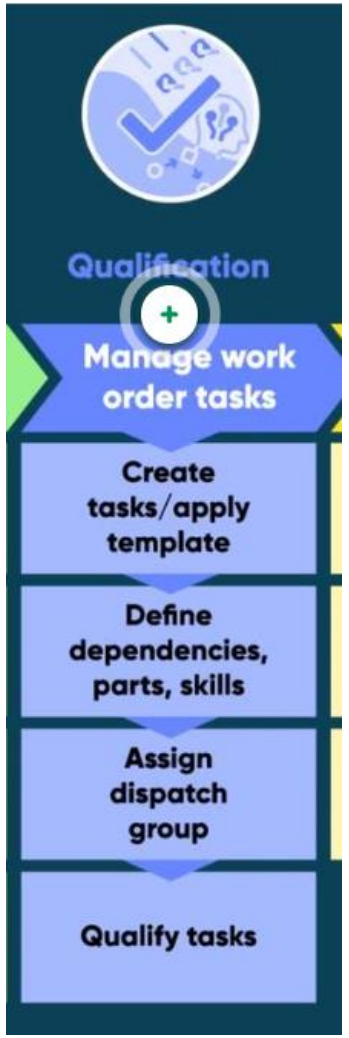
WORK ORDER INITIATION

- Initiation is the first phase of the FSM process
- Initiation involves the creation of a work order from various methods (with or without using a template)
- This is where we capture all the necessary work order details and associated assets
- Next is the assignment of a qualification group
- Lastly is the approval of the work order before we move on to the next stage
  - This approval is to ensure that we have all of the necessary information details
  - Some organizations may require the approval step to confirm contractual entitlements



WORK ORDER QUALIFICATION

- Qualification is the 2nd phase of the FSM process
- In this phase, a qualifier needs to review and validate each work order task
- A work order request can be segmented into several work order tasks which may operate independently or in a sequence
  - These tasks could be installing a modem or repairing a windmill
- Work orders can be qualified automatically or manually



SCHEDULING & DISPATCH

- Scheduling & Dispatch is the 3rd phase of the FSM process
- Here, if any additional information is needed regarding the work order tasks, it can be collected in this phase before a field agent is dispatched
  - This may be additional request information or information about scheduling when the dispatcher can come
- Dispatchers will assign work order tasks to field agents based on criteria such as location, skills, parts, and availability
- Once a field agent that meets the necessary criteria has been identified, the work order task can be assigned and that field agent will be dispatched at the scheduled time

GEOLOCATION

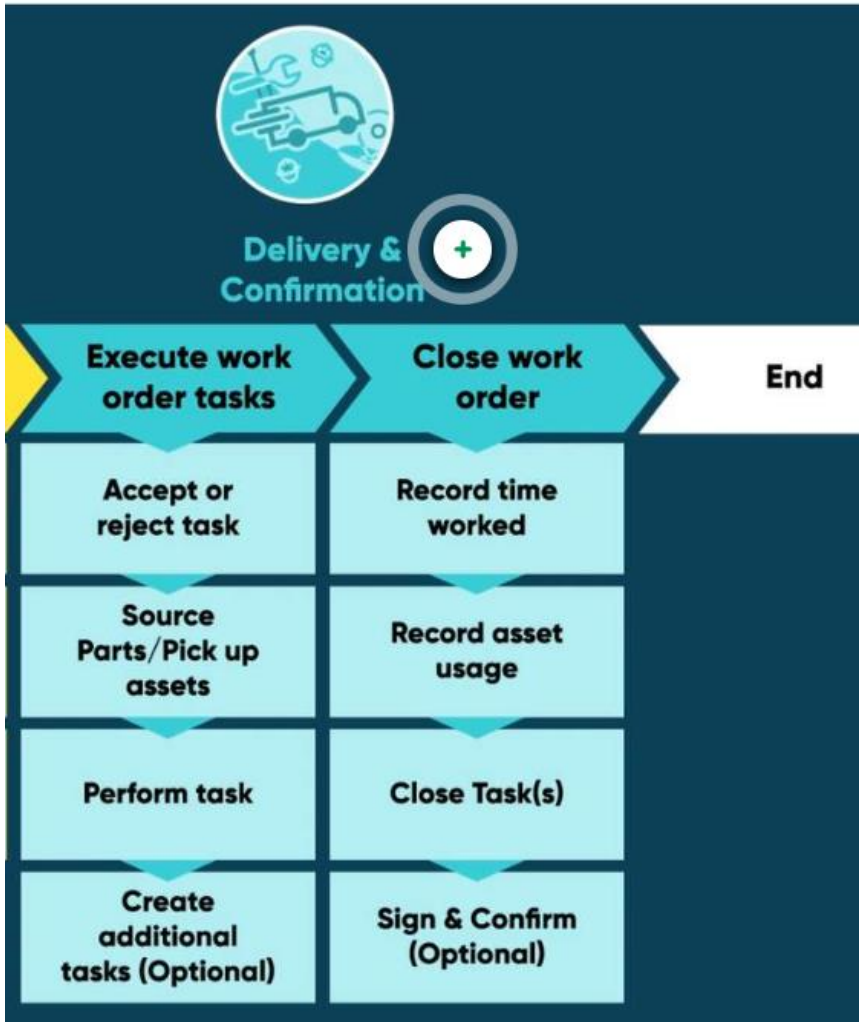
- One important key feature of FSM is geolocation
- Geolocation utilizes Google Maps (or alternative map integrations) to enable user tracking, efficient route planning, and accurate travel time estimates
- Once geolocation is activated and set up, it provides continuous user location tracking
  - This helps us track business operations and give us data to better estimate how long a task will take to complete
- The system refreshes a field agent's location with every update they make to a task record
- Dispatchers can ping devices to acquire agent location data at time-based intervals (such as every 10 minutes)

STOP HERE

- Stop here for now, we will resume the rest tomorrow

DELIVERY & CONFIRMATION

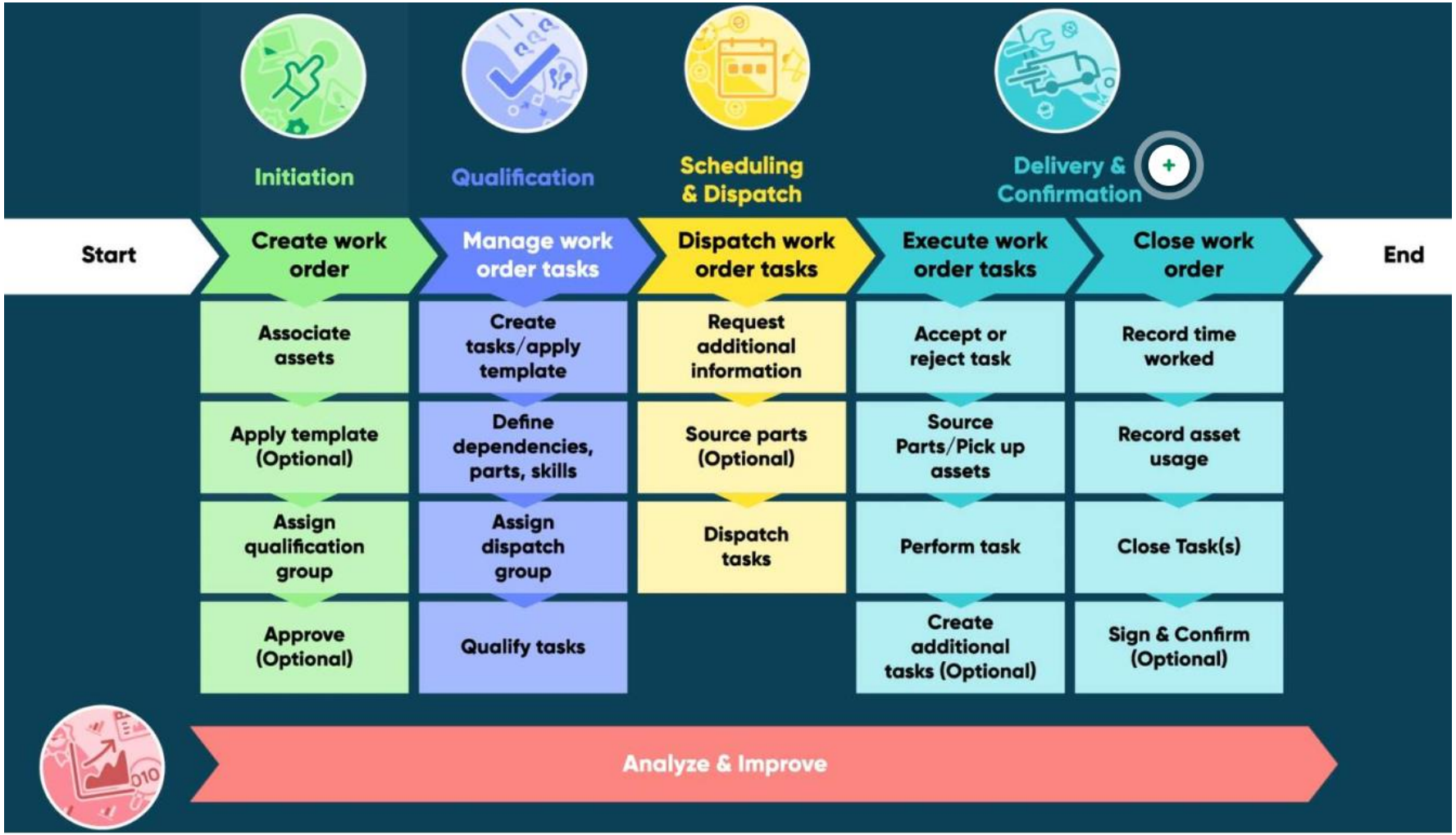
- Delivery & Confirmation is the 4th phase of the FSM process
- In this phase, field service agents work on the tasks that have been assigned to them
  - They will use either the desktop user interface or the Now Agent Mobile application
- Mobile offline capabilities allows field agents to work at sites without reliable internet connections
- Route Optimization helps field agents organize tasks for the day as efficiently as possible using either geolocation or straight-line estimation



ANALYZE & IMPROVE

- Analyze and Improve is the '5th' and final phase of the FSM lifecycle
- This phase takes place during ALL other phases of the FSM lifecycle
- In order to facilitate analysis and improvement activities, data is collected during all phases
- This data is used as the basis for field-service reporting and analytics
- This data is also then used to drive improvements in later iterations of the FSM lifecycle

FSM LIFECYCLE REVIEW



NO DEMO

- The FSM application is not included in our dev instances
- To get hands-on practice with FSM, enroll in the FSM Fundamentals course and get a learning instance: Field Service Management (FSM) Fundamentals On Demand - ServiceNow University