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BUSINESS GUIDE

Unify Field Operations With ERP to Drive Profitability

How an integrated suite improves field-to-office communications, builds customer satisfaction, and simplifies accounting

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Companies have struggled with the same classic field-service operations challenges for years: double-booked schedules, high fuel costs, lack of communication, limited information on jobs, and time-consuming billing processes. But these should not be accepted as unavoidable headaches. By giving your team the complete and accurate data they need, the right technology can better support both your field and office staff to minimise these challenges.

To get all the right data to support field services operations, you need to choose field service software with an eye on much more than its ability to support your needs in the field. You need to bust field services out of its data silo. Businesses should take a more holistic view, aiming for a system that can increase efficiency starting from job initiation through customer payment and financial reporting. That approach means looking for a field service application that's tightly integrated with other critical business systems such as ERP. When these systems work together to share data and improve workflows across adjacent functions, it benefits the entire organisation.

This guide will describe a few common challenges in field services and explain how a system that unifies field operations with other critical pieces of your business can address them. What really matters isn't just the features of your field service software but the collective capabilities of the field service software and ERP system that's at the heart of your business.

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Siloed, Manual Processes Limit Growth

Whether field operations are the core of your company's offering or just one component of your business model, capturing the valuable data gathered in the field and integrating it with other information from across your business can be quite challenging. Even if an organisation has an ERP or other business management system in place, field service operations often run separately. Here are some of the problems when business functions run as siloed, and often manual, processes:

Inefficient paper-based processes

Organisations that rely on paper-based processes to manually collect data, manage customer assets, track inventory, and dispatch field technicians do so at the expense of their service productivity, customer experience, and profitability. So, it is essential to use field service management software to handle these tasks.

Paper job sheets have a double-whammy effect. Not only do they create delays in getting essential information back to the office, but administrative employees must then manually enter the data into your system. Your staff may also have to manage customer disputes long after the job is complete— unless customers sign off on the job before the technician leaves, acknowledging parts, labour, and job outcomes, the likelihood of dealing with customer disputes increases. Disputes take up valuable employee time and lead to poor customer experiences. They may also lead to making concessions for parts and labour that hurt your margins.

A growing field service business that runs on clipboards and spreadsheets will increasingly struggle to keep up with the competition in their industry. Analogue processes are an obstacle during the best of times and, as technology continuously improves, increasingly put these companies at a major disadvantage.

Inaccurate inventory and asset management

Running separate systems to manage the various pieces of field services, such as inventory management and asset management, can result in different systems showing different information. When those inconsistencies bubble up through the organisation, they can lead to issues including low first-time fix rates, difficulty tracking lost and stolen stock, and missed revenue due to spending extra time communicating with the office.

Delayed customer invoicing

Siloed systems can delay invoicing because you must gather financial data from disparate systems. If the numbers don't add up, that means even more time spent digging into the source of the problem. Then, that data needs to be put into your financial system to send the invoice to the customer and post the transaction to your books.

Inadequate metrics and KPIS

When a business can't efficiently track its field operations, it leads to slower decision-making, poorer resource planning, and lost potential revenue and customers. Without a clear picture of your utilisation of field techs, your business doesn't understand what's impacting revenue and margins. Relying on service teams to manually enter all the details about a job increases the risk of errors and incomplete information, in turn reducing the accuracy and limiting the scope of your reporting. This can result in focusing energy and attention on areas that will not really move the needle.

Field service management software can help solve many of these common problems. That ultimately means your business can deliver more effective and profitable field services, in turn increasing customer satisfaction and fueling the growth of your operations.

NetSuite: A Suite Approach

NetSuite was built on the idea that a unified suite of applications spanning your business gives you the transparency and insights to fuel success and growth. In addition to eliminating the need for integrations and constant data reconciliation between systems—and the problems that inevitably brings—field service management software that runs on the same platform as your ERP system creates a strong digital foundation for the entire company. Service delivery, accounting, business planning, and all other key organisational functions use a common database and user interface, helping increase data accuracy and empowering employees across the organisation to use real-time information to inform key business decisions.

For field service businesses, unifying field operations and financials means that financial activities appear as soon as work is done—allowing them to make decisions on resource allocations, inventory purchasing, job and project forecasts, and budgets based on the latest data. As soon as jobs are completed, the system can reflect them in the master project plan, update inventory levels based on what was used, and trigger customer invoices. This eliminates the manual work done in spreadsheets to reconcile inventory, resource utilisation, and jobs and lets you see up-to-date reports on-demand.

CHAPTER 3

The Benefits of a Field Service Management Suite

NetSuite Field Service Management helps your business deliver higher quality and more profitable field services. The application encompasses accounting, inventory management, preventive maintenance, and customer asset management to keep all information in one place and eliminate time spent manually updating data in different systems.

Key benefits of NetSuite Field Service Management include:

- **Better utilisation.** Technicians can get more done with the routing and scheduling capabilities in NetSuite Field Service Management. Drag-and-drop scheduling and dispatch makes it much easier to assign jobs to the right resources, and techs can be alerted of their next job through the field service mobile app. It provides the visibility required for better utilisation of not only field techs but the other assets your business uses—trucks, equipment, tools, and more. All of this helps you get more out of the resources you have.

- **Raise first-time fix rates.** Getting a job done in one visit is important for preserving the profitability of jobs, making the most of available time, and keeping customers as happy as possible. NetSuite Field Service Management helps improve your first-time fix rate by giving schedulers and techs better insights about what to expect at a job, including a record of previous visits, all from the mobile app. This helps them collect the supplies and tools required to complete the job before the truck rolls out.

- **Get paid faster.** Financials are at the heart of NetSuite, so its field service module makes it easy to tie work in the field to sales orders and invoices. You can easily send invoices based on work done and

inventory used right away for more accurate and timely bills. And since NetSuite and field service management work together, you can set up recurring jobs with automatic invoicing and payments.

- **Increase customer satisfaction.** Lapses in communication and job coordination can have negative implications for a job or project and, in the worst cases, alienate a previously happy customer. NetSuite Field Service Management helps prevent these issues by making service delivery as efficient and transparent as possible. For example, customers can see an itemised list of services performed and sign off on the work completed right in the mobile app. Easy access to all job and customer details prevents follow-up visits, and automation avoids errors that frustrate customers.

- **Make data-driven financial decisions.** Since NetSuite Field Service Management collects data throughout service delivery and pulls it into the ERP, companies can understand their operations better than ever before. Businesses can determine the profitability of every job, customer, service contract, or technician and track improvements against KPIs. They can then make adjustments and decisions based on data rather than assumptions and precedent. Billing and financial reporting is immediate, so you can assess sales and make crucial decisions based on the latest data.

- **Reduced financial close time and manual data entry.** Set up automations and controls for approvals of different types of transactions, recognise revenue as the job or project completes, and increase the accuracy of financials to reduce month-end processing costs and time.

Running a field service business that's part of a broader suite of unified software that can support your field operations has several clear advantages over using multiple siloed or loosely integrated solutions.

Combining more data from more sources and feeding it directly into NetSuite's powerful analysis and reporting tools uncover insights that would otherwise be missed and provide a broad and deep perspective on performance. NetSuite helps provide the clarity and context that decision-makers need to act confidently and make the right choices more often.

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