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Bring your field agents in from the cold

How to keep remote workers plugged into business systems at all times

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by Larry Noble

The key to getting your field service technicians plugged into your accounting/enterprise resource planning (ERP) system is proper integration. You need to either buy a field service management product that is designed to work well with your existing infrastructure and software, or you need to build one.



Of course, in order to add this product, you should have a mid-to high-end accounting/ERP program. Some examples include, Epicor, SYSPRO, Lawson Software, Microsoft or one of the many Sage products (other than Simply Accounting). Products such as Quicken, QuickBooks and Simply Accounting are not going to provide the infrastructure required to allow you to hook on a good quality field service management system.

Integration benefits

Your field service management system can help you improve your call management and dispatch, customer support and sales - even

your parts tracking. But it will only work if that system allows users to enter data - once only - and that data is shared throughout the company. It must be available to everyone: your technicians in the field, service coordinators and all billing and finance staff. That's proper integration.

Such a system will help you improve your customer service response times, increase productivity by allowing efficient job scheduling and prioritization, manage employee timesheet entry and speed up billing cycles. But it will also allow you to create service reports, work orders, perform detailed analysis and manage your technicians more efficiently.

Common problems

One of the biggest troubles technicians and sales people can experience on the road is a lack of information. If your sales people arrive at a prospect or customer office but do not know that an open service call already exists that might influence a buying decision, it can blow the deal. Similarly, if your technician doesn't know that the customer has already had multiple service calls about the same problem part, they may not handle the situation with enough sensitivity from the outset.

Or, your current system of dealing with technicians may require programming in query language in order for you to extract any reports from the data. It may use a flat file database system that makes it impossible to search records easily. Developing reports for new business ventures might be a major undertaking.

Perhaps most damaging in the long term, your system might allow employees to take shortcuts and not log all their customer information on an ongoing basis - information such as who the correct

contacts were, and who called whom when. If technicians or sales people enter the information but there's no integration back to the office, valuable company information might just be sitting on personal laptops that are unconnected to everything else and seldom if ever backed up.

Technicians have needs, too

It is essential that complete information about customers be instantly available. Everyone who touches the application must input information about his or her dealings with a customer. All the data should sit on one server, and it should be accessible to all.

Anyone should be able to handle a customer query and instantly see a complete account history. As well, your software should make it easy for anyone, even non-technical employees, to generate customized reports.

Better field service

Your system could address crucial field issues. For example, it's helpful to have a serial number tracking system so your technicians can ensure that they only service equipment sold by you and still under warranty.

Return on Investment

A good field service management system will help you build an effective, efficient service department. This will almost always lead to a loyal customer base and long-term success.

If you're like most repair and maintenance service providers, your company rises and falls on the loyalty of your long-term customers - but loyalty these days is harder to come by. Everyone is vying for service contracts.

As a result, many companies focus their investments on marketing to new customers. But acquiring a new customer can cost more than five times as much as keeping an existing customer.

While gaining new customers is critical to your growth and success, the easiest way to increase your long-term revenue is to retain more of your existing client base through fast, effective service. Integrating a good field service management system properly with your current accounting/ERP system and infrastructure will get your company well on the way to doing just that.

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