

Field Service and CRM – A Dynamic Pair!

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AGENDA

- About PowerObjects, an HCL Company
- Field Service: Drivers for Change
- Solution Overview
- Benefits
- Demonstration
- Questions ?

About PowerObjects



- PowerObjects was founded in 1993
- We have been 100% focused on CRM since 2008
- Recognized leader in the industry
- Worldwide Microsoft Partner of the Year in 2012 and 2013

- Our staff is diverse – hailing from 17 different countries and speaking 31 different languages
- One of the most widely visited Dynamics CRM websites in the world- including our blog and our free online Dynamics CRM guidebook: The CRM Book

Field Service: Drivers for Change

- Increase Service Revenue x% or \$ Over a Period of Time
- Reduce Costs x% or \$ Over a Period of Time
- Increase Employee Productivity
- Increase Customer Satisfaction / NPS
- Increase Employee and Partner Satisfaction
- Adhere to Regulatory Compliance

Provide Timely and Effective Communications

Improve First Time Fix Rate

Grow Service Revenue and Sales

Eyes to the Future:
“Internet of Things” with
connected Machines

Field Service in Microsoft Dynamics CRM: Changing the CRM Landscape




Sales

- Salesforce Automation
- Sales Forecasting
- Lead Management
- Operational Reporting
- Opportunity Management
- Sales Processes (Lead-to-Close)
- Pipeline Management



Customer Care

- Trouble Ticketing
- Case Management
- Customer Portals
- Knowledgebase
- Customer History
- Unified Service Desk
- Operational Reporting
- Chat
- QA Reporting



Marketing

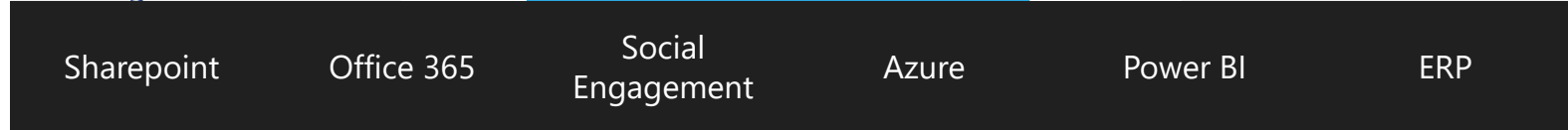
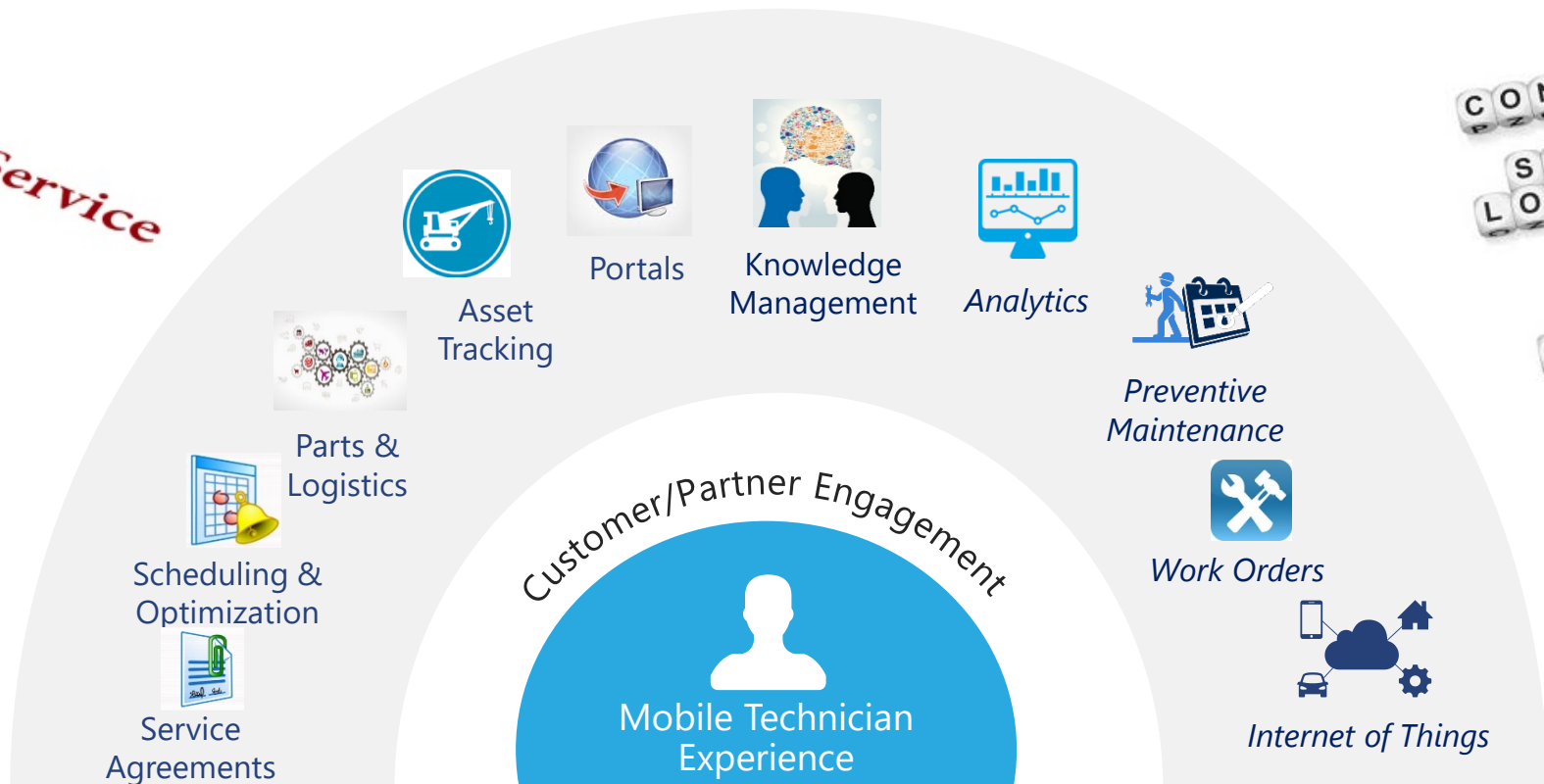
- Campaigns
- Web Forms
- Surveys
- Social
- Nurture
- Marketing Automation



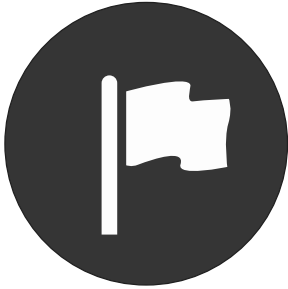
Field Service

- Scheduling/Dispatch
- Time & Resource
- Service Activities
- Inventory
- Assets/Warranty
- KPIs & Reporting
- Customer & Sub Contractor Portals
- Mobility
- SLA's
- Route Optimization
- Service Agreements
- RMA/RTV
- Process Automation

Dynamics CRM Field Service



Closed Loop Service Lifecycle



**PRODUCT / SERVICE
PURCHASE**

**SERVICE
ISSUE**

**WORK ORDER
CREATION &
DISPATCH**

REPAIR

INVENTORY

CLOSE

ANALYZE

- Service Contract
- Maintenance schedule
- Tiered SLA

- Case Management
- Knowledge Management
- Remote device Monitoring
- Customer Self Service
- Entitlement Check

- Workforce routing & Optimization
- Partner Visibility
- SLA Compliance

- Mobile Access
- Work Orders Collaboration
- Service History

- Parts Management
- Forward Logistics
- RMA & RTV Management
- Van Stock Visibility
- Purchasing

- Signature Capture
- Invoicing
- Product/Services Pricing

- Ticker
- Reports
- Dashboards
- Failure Analysis
- Profitability

Delivering Value Across the Enterprise



EXC. Management

- Rapid and on-demand configuration
- Robust reporting and business intelligence
- Revenue expansion and growth
- Delivering productivity gains



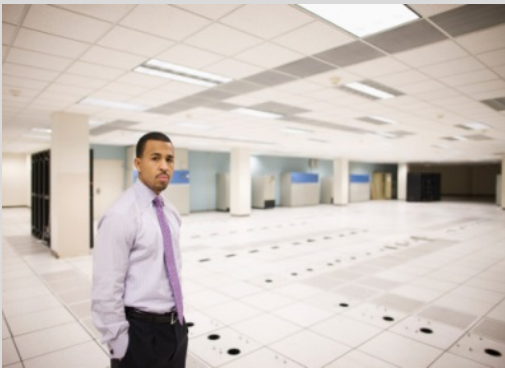
Operations Management

- State-of-the-art routing and scheduling
- Advanced work process automation and reduces back office
- Improved resource asset utilization



Mobile Resources

- Increased Productivity
- Enhanced coordination with dispatch
- Electronic capture of all info, including signatures



IT Organization

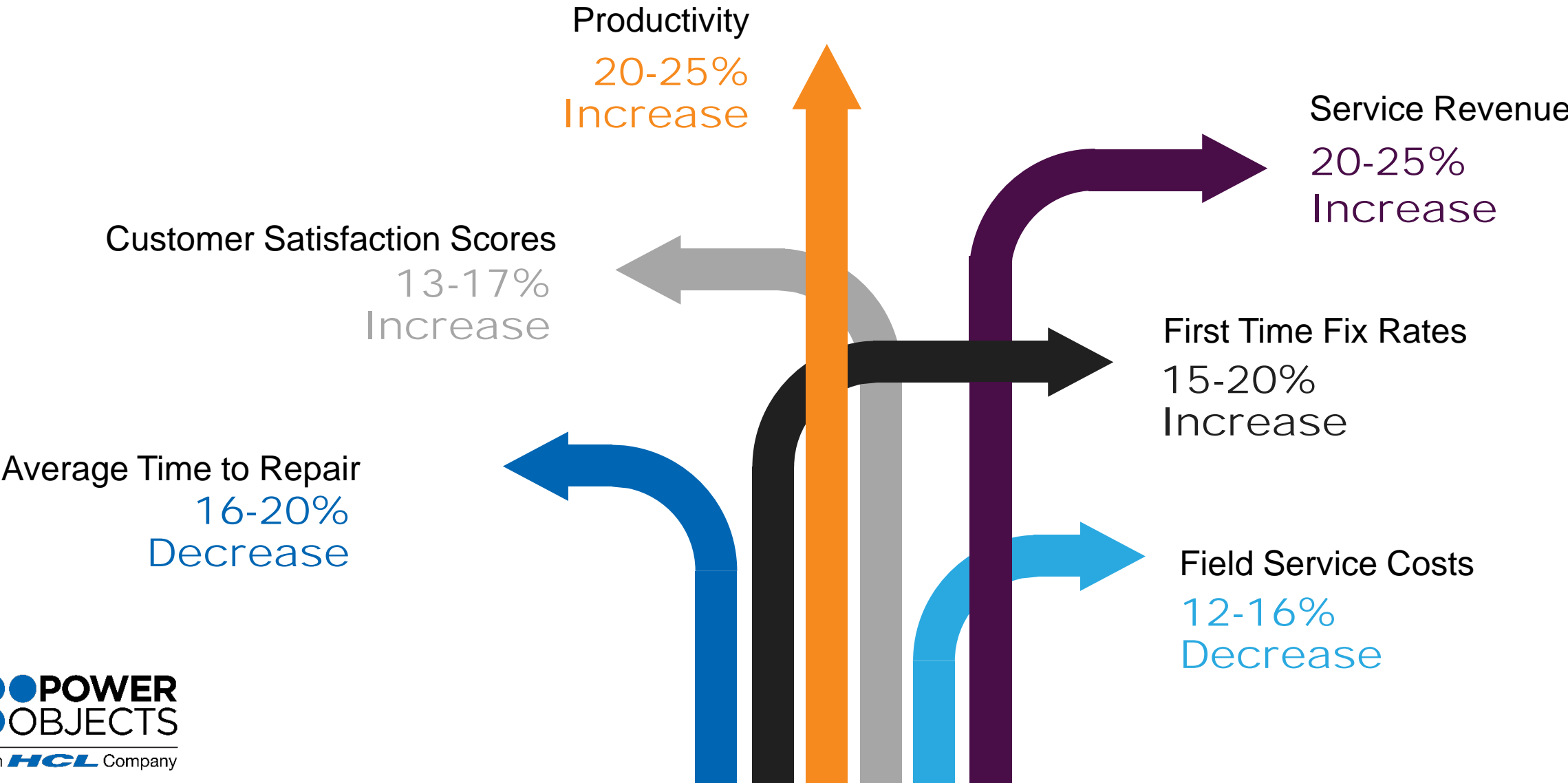
- Flexible deployment options with off-the-shelf functionality
- Highly scalable software platform
- Comprehensive integration with existing apps



Customer

- Improved customer experience
- Faster response and ticket closing
- Better visibility and status information
- Differentiator driving customer loyalty

Benefits of Dynamics Field Service



Visibility into Your Business

SAVE AS NEW EDIT DELETE SHARE DASHBOARD

Up to the minute

Warranty Lookup

Active Customer Search

| Account | Serial Number | Warranty Status | Model Number |
|-------------------------------|---------------|-----------------|--------------|
| 20 20 Printing Inc | 55897521 | Active | Wood Dou... |
| A K Construction Co | 37785302 | Active | Wood Dou... |
| A R Packaging | 59315280 | Active | Wood Dou... |
| Abc Enterprises Inc | 45925211 | Active | Wood Dou... |
| Admiral Party Rentals & Sales | 58665585 | Active | Wood Dou... |
| Alinabal Inc | 96970729 | Expired | Wood Dou... |
| Alpenlite Inc | 92967735 | Expired | Wood Dou... |
| Ambelang, Jessica M Md | 99565913 | Expired | Wood Dou... |

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Primary Incident Type by Zip

Active Work Orders - Zip

| Zip | Percentage |
|-------|------------|
| 06460 | 75% |
| 06461 | 10% |
| 06505 | 5% |
| 06510 | 3% |
| 06511 | 2% |
| 06512 | 2% |
| 06513 | 2% |
| 06515 | 1% |

Active Work Orders

| Work Order Nu... | Service Account | System Status | Sub-status | Prim |
|------------------|--------------------------------|--------------------|------------|-------|
| 01701 | Mclaughlin, Luther W Cpa | Open - Unscheduled | | GSF-5 |
| 01698 | Mclaughlin, Luther W Cpa | Open - Scheduled | | GSF-5 |
| 01694 | Mccorkle, Tom S Esq | Open - Scheduled | | GSF-5 |
| 01691 | Wye Technologies Inc | Open - Scheduled | | GSF-5 |
| 01689 | Wtlz Power 107 Fm | Open - Scheduled | | P0034 |
| 01688 | Woodbridge Free Public Library | Open - Scheduled | | P0033 |
| 01687 | Wood & Whitacre Contractors | Open - Unscheduled | | P0035 |
| 01686 | Windsor, James L Esq | Open - Unscheduled | | P0036 |

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Initial public view Inspections Connecticut Houston Schedule Board #5

Filter & Map View

Map View

| Resource | Total | Total % |
|----------------|-------|---------|
| Field Tech (6) | | |
| Field Tech 1 | 7:31 | 84 % |
| Field Tech 2 | 6:30 | 72 % |
| Field Tech 3 | 6:54 | 77 % |
| Field Tech 4 | 7:17 | 81 % |
| Field Tech 5 | 7:50 | 87 % |
| Field Tech 6 | 8:14 | 91 % |
| Others (2) | | |

4/11/2014

Details

| Name | Value |
|---------------|---------------------|
| Resource | Field Tech 1 |
| Start Time | 04/11/2014 9:00 AM |
| End Time | 04/11/2014 10:12 AM |
| Estimated... | 04/11/2014 9:12 AM |
| Estimated... | 12 |
| Actual Arr... | |
| Actual Tr... | 0 |
| Work Order | 01570 |
| Work Ord... | Maintenance |
| Address ... | |
| Address1 ... | 129 Edwards St. |
| Address2 ... | |
| Address3 ... | |
| City (Wor... | New Haven |
| State (W... | CT |
| Zip (Work... | 06511 |

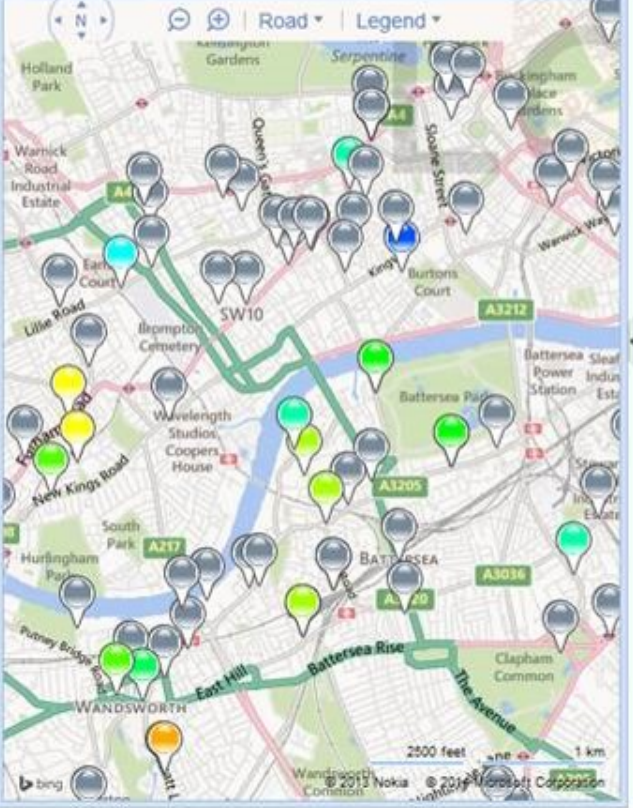
Visibility into Your Field Organization

Service Team Brighton High School Schedule Board #6 South of England North of England Service Centre 2 Troubleshooters

Filter & Map View

Filter Map View

Map View Settings WO Number:



Hours Horizontal View Scheduler Settings Actions

24/02/2014 Previous Next Calendar

| Resource | Total | Total % | 24/02/2014 | | | | | | | | |
|----------------|-------|---------|------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------|-------|-------------------------------------------------------------------------------------------------------------------------------------------------------------|
| | | | 08:00 | 09:00 | 10:00 | 11:00 | 12:00 | 13:00 | 14:00 | 15:00 | 16:00 |
| Alvin Lee | 06:00 | 67 % | | WO number: 00252 Time: 09:09:00 - 11:11:00 Service Account: Barley Mow Address: 104 Horseferry Incident: Service Call Work Order Type: Service | | WO number: 00243 Time: 11:11:00 - 13:13:00 Service Account: Anglesea Address: 7 Mawbey Street Incident: Misc. Install Work Order Type: Install | | | | | WO number: 00250 Time: 16:16:00 - 18:18:00 Service Account: Balham B. Address: 11 Roehampton Incident: Service Call Work Order Type: Service |
| Aynsley Lister | 06:00 | 63 % | | WO number: 00246 Time: 09:09:00 - 11:11:00 Service Account: Armoury Address: 72 Garratt Lane Incident: Warranty Work Order Type: Service | | WO number: 00244 Time: 11:11:00 - 13:13:00 Service Account: Antelope Address: 17 Park Road,Ch. Incident: Service Call - Pr Work Order Type: Service | | WO number: 00250 Time: 13:13:00 - 15:15:00 Service Account: Balham B. Address: 11 Roehampton Incident: Service Call Work Order Type: Service | | | |
| Bernie Marsden | 06:00 | 63 % | | WO number: 00301 Time: 09:09:00 - 11:11:00 Service Account: Duke on t Address: 582 Fulham Roa Incident: Annual Mainten Work Order Type: PM | | WO number: 00303 Time: 11:11:00 - 13:13:00 Service Account: Durell Ar Address: 1-3 Parsons Gre Incident: Service Call Work Order Type: Service | | WO number: 00251 Time: 13:13:00 - 15:15:00 Service Account: Bank Address: 339 Battersea P Incident: Warranty Work Order Type: Service | | | |
| Chris Barber | 09:00 | 90 % | | WO number: 00337 Time: 09:09:00 - 11:11:00 Service Account: Hero of S Address: 1-13 Falcon Roa Incident: Service Call Work Order Type: Service | | WO number: 00262 Time: 11:11:00 - 13:13:00 Service Account: Bolingbro Address: 60 Battersea Hig Incident: General Repair Work Order Type: Service | | WO number: 00242 Time: 13:13:00 - 04:04:18 Service Account: Anchor Address: 147 St Johns Hill,Clapham Junction,United Kingdom Incident: Service Call Work Order Type: Service Call | | | |
| Chris Farlowe | 08:00 | 80 % | | WO number: 00401 Time: 09:09:00 - 11:11:00 Service Account: Queen Vic Address: 134-138 Wands Incident: Service Call Work Order Type: Service | | WO number: 00248 Time: 11:11:00 - 15:15:00 Service Account: Atlas Address: 425 New Kings Road,Fulham,United Kingdom Incident: Misc. Installation Work Order Type: Install | | | WO number: 00381 Time: 15:15:45 - 17:17:45 Service Account: Oak Tavern Address: 37 High Street,S Incident: Maintenance Work Order Type: PM | | |
| Duffy Power | 06:00 | 60 % | | WO number: 00245 Time: 09:09:00 - 11:11:00 Service Account: Arab Boy Address: 68-70 Streatha Incident: Estimate Work Order Type: Estimate | | WO number: 00247 Time: 11:11:00 - 13:13:00 Service Account: Asparagus Address: 85 Albert Bridge Incident: Commercial Esti Work Order Type: Estimate | | WO number: 00251 Time: 13:13:00 - 15:15:00 Service Account: Bank Address: 339 Battersea P Incident: Warranty Work Order Type: Service | | | |
| Eric Clapton | 08:00 | 89 % | | WO number: 00391 Time: 09:09:00 - 13:13:00 Service Account: Pied Bull Address: 68 Wandsworth High Street,Wandsworth,Uni Incident: Commercial Install Work Order Type: Install | | | | WO number: 00257 Time: 13:13:15 - 17:17:15 Service Account: Black Lion Address: 21 Morden Hall Road,Morden,United Kingdom Incident: Section Install Work Order Type: Install | | | |

Unscheduled Work Orders

DEMO



cargill hall
Gill Hall
David Darty Board Room (N 200)

DEMO AGENDA

Field Service Foundation



Operations Manager

- Navigation
- Dashboards & Reporting
- Customer 360
- Installed Product 360

Service Management Lifecycle



Customer Care

- Customer Issue
- Case Creation
- Search for Resolution
- Work Order Creation



Scheduling & Dispatch

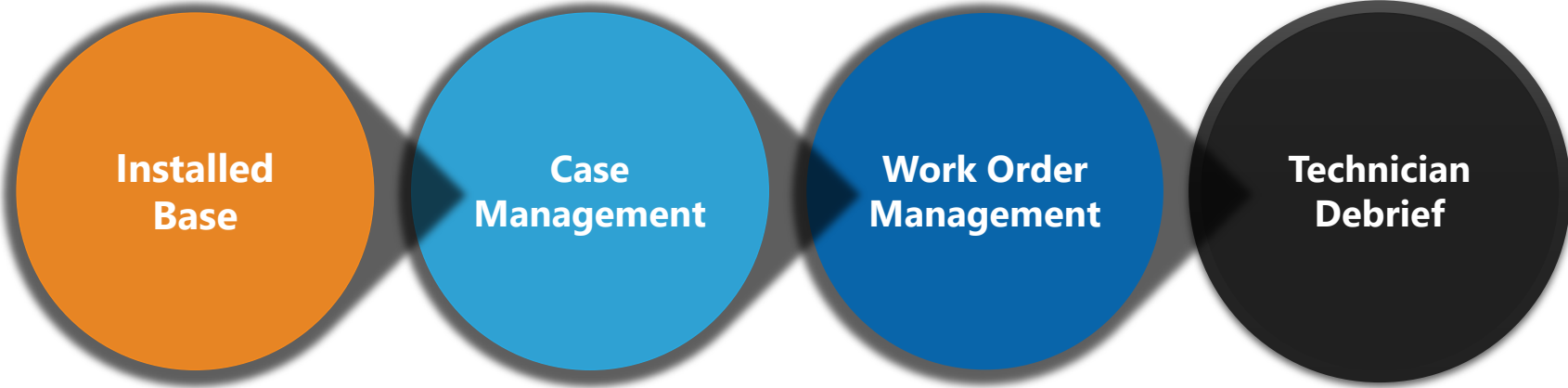
- Schedule Board
- Territories
- Technicians
- Assignment



Technician

- Schedule
- Work Order Debrief
- Pictures & Videos
- Signature & Closure

Service Management Lifecycle



- Warranty
- Service Contract
- PM Schedules
- Product History
- Configuration

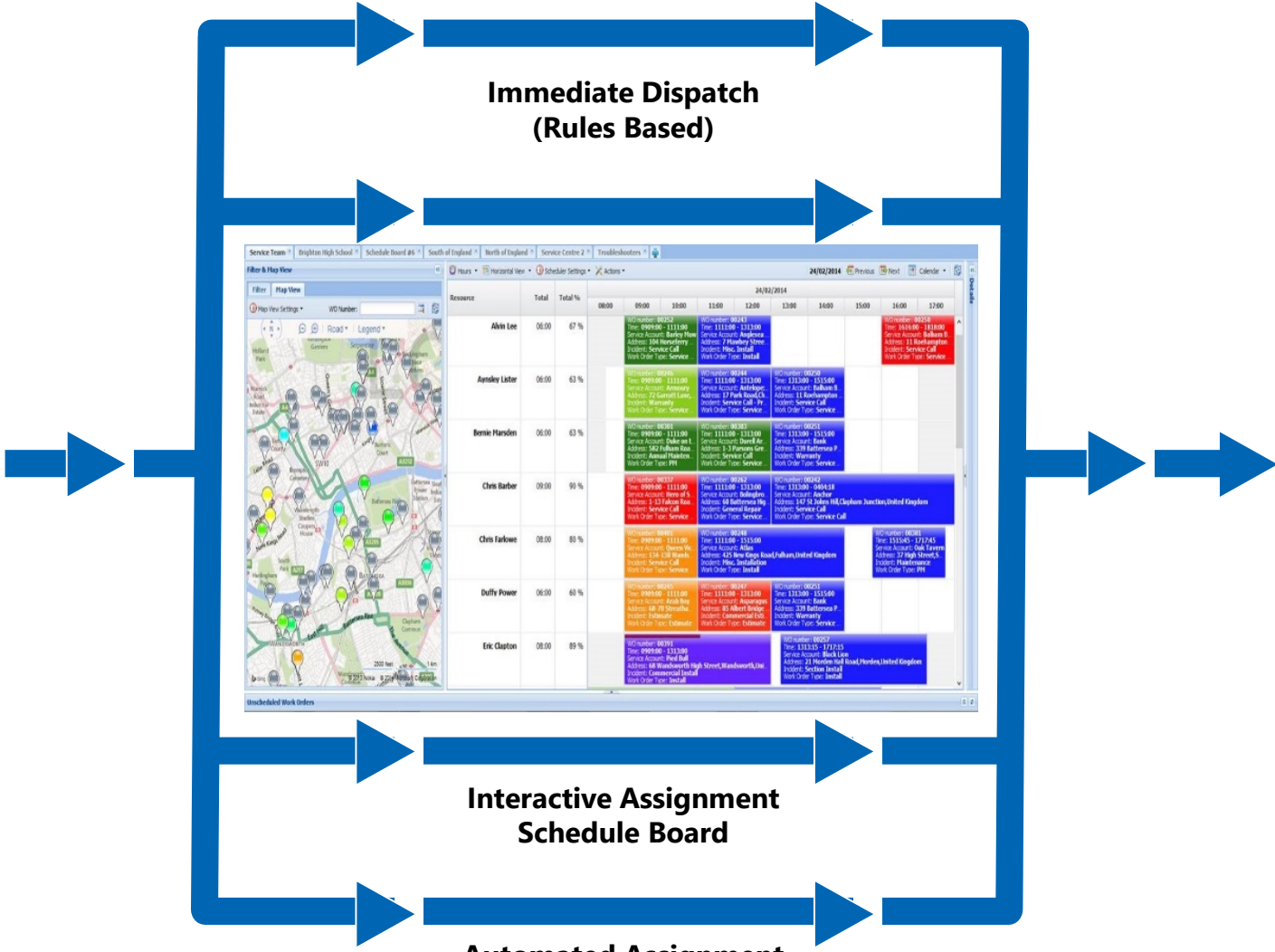
- Contact Center and USD
- CTI
- Knowledgebase
- Customer Portal
- Chat

- Call Center
- Escalations
- Scheduling
- Optimization
- Dispatch

- Calendar
- T&M
- Inventory
- Mobile
- Offline

Business Process Driven Service Flow
Case Management, Break/Fix, PM, Depot Repair, etc.

Four Methods for Schedule, Assign & Dispatch



Questions ?



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