FIELDBIT

Managing Digital Transformation in Large Field Service Organizations

Fieldbit Implementation
Methodology

Overcome the Fear of Change

Digital transformation in large-scale enterprise service organizations is a complex and challenging process. With respect to field services, the implementation of new technologies often requires changes in highly entrenched workflows, processes and practices.

Recognizing the importance and challenges of the implementation process, Fieldbit has developed a unique methodology aimed at helping enterprises to maximize value from our real-time augmented reality and knowledge capture solution, while minimizing risks and costs.

This paper outlines the key challenges in managing change across large industrial organizations, and provides a practical step-by-step description of how Fieldbit's experienced implementation experts work together with each customer's team to build optimal workflows that ensure smooth adoption.

Digital Transformation is Revolutionizing Field Services

New market trends and challenges are forcing field service organizations to reconsider their existing structure and business models:

Reducing downtime is critical KPI in all industries - Fast and efficient analysis, diagnosis and resolution of complex technical issues require effective collaboration among the field technician, one or more domain experts and even end-users.

Shrinking margins from equipment sales - Due to increasing competition and shrinking margins, equipment vendors are looking for ways to increase profitability from services and to sell service-based products.

Aging workforce and knowledge drain – As experienced field personnel retire, organizations seek ways to capture their practical knowledge and make it available to new service engineers and technicians. Moreover, in light of the shortages in skilled personnel and increasing equipment complexity, organizations are establishing technical competence & support centers to hone the skills of their field service teams.

Mature Game-Changing Technologies Are Available

Digital transformation of field services, based on advancements in technology and continuous improvement in mobile communications, enable organizations to address these key challenges. Fieldbit's software platform harnesses Augmented Reality visualization, smart glasses, live video and cloud computing technologies to deliver seamless remote assistance and on-job knowledge capture.

The Challenge: Managing Change in Large Service Organizations

Bringing digitalization into field service organizations requires careful planning and a holistic approach, and involves much more than the installation of a new software system, regardless of its level of sophistication. This type of project requires buy-in across the entire organization, and may often necessitate re-thinking of work processes, traditional practices and changes to the support organization structure.
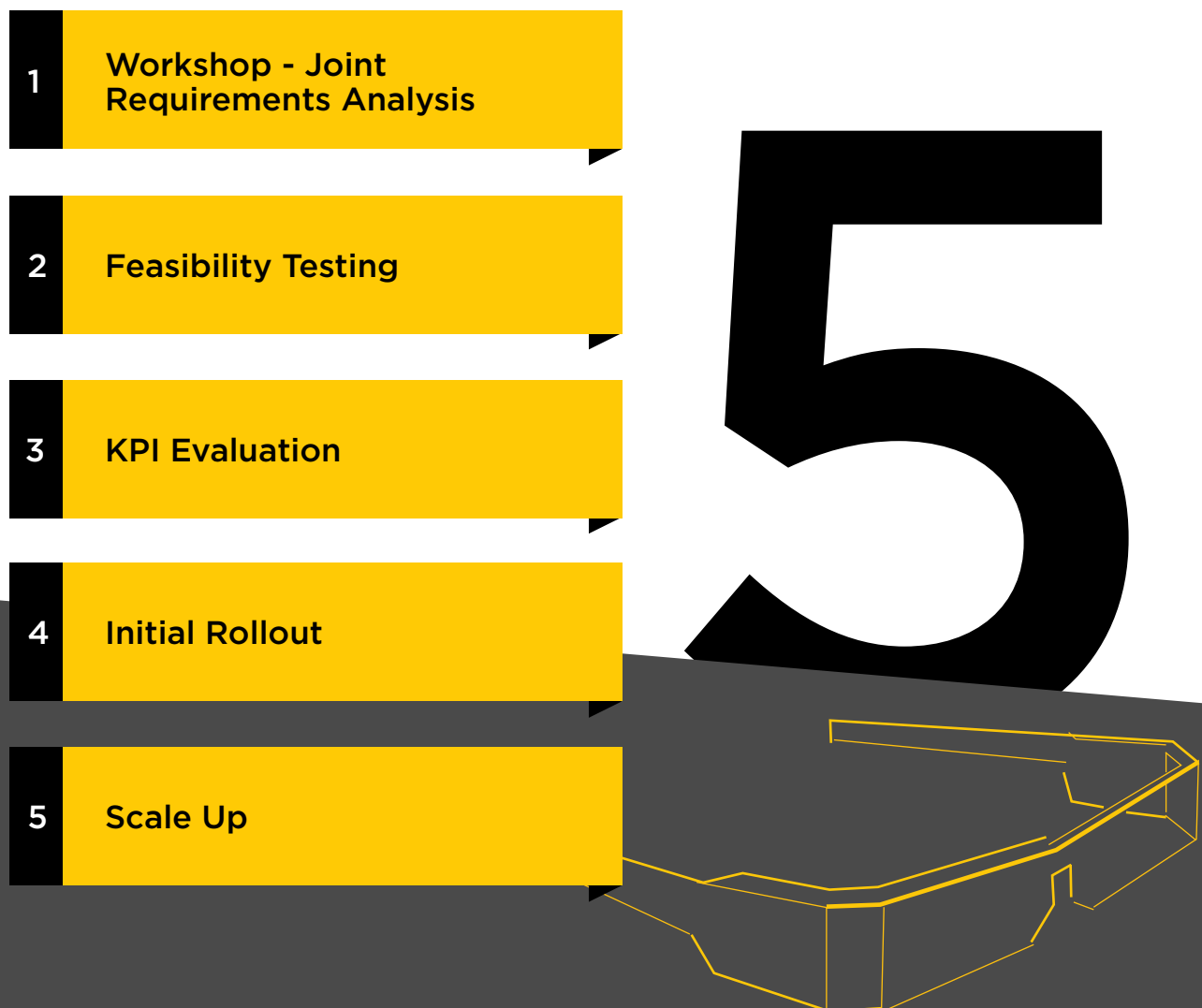
Digital transformation is not about technology per se, but rather how to engage and encourage field technicians, support engineers, and experts to use new technology in their daily working routines. Our experience shows that close collaboration and open communications between Fieldbit's technology experts and the equipment vendor's implementation team throughout the process creates synergies that drive significant value above and beyond the software deployment.
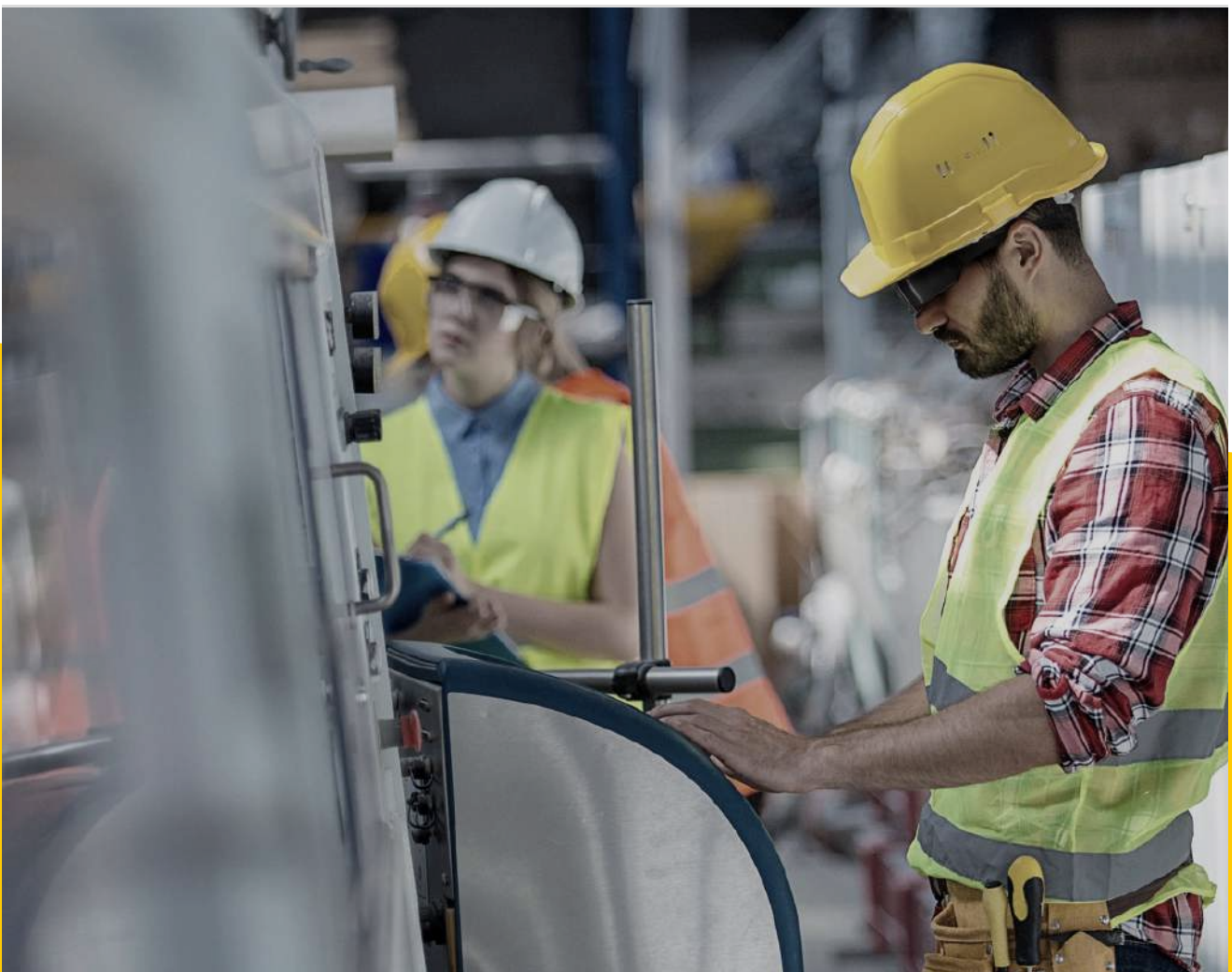
How We Do It: Implementation Methodology for Service Digitalization

Fieldbit's implementation approach enables the smooth transformation of processes and workflows, as needed, to maximize each organization's benefits from the Fieldbit solution. Our proven methodology engages the customer at both the business case and end user levels, helping to alleviate the inherent resistance to change that exists in every large organization. Working hand-in-hand with each customer, our dedicated implementation team helps you define new and optimized work processes by analyzing the business case and the current work procedures, determine the correct way to operate the Fieldbit solution, and address internal and external (to end customers) communications.

The methodology for implementing Fieldbit's augmented reality and knowledge capture solution in field service organizations consists of the following practical steps:

1 | Workshop - Joint Requirements Analysis

2 | Feasibility Testing

3 | KPI Evaluation

4 | Initial Rollout

5 | Scale Up

1 Workshop - Joint Requirements Analysis

This is the most critical step in the entire implementation process. During this phase, Fieldbit meets with the relevant managers, trainers, experts, technicians and field engineers, and analyzes the existing working procedures and requirements for implementing Fieldbit's solution.

The objectives of the workshop phase are as follows:

- Define a working process for using the system

- Define KPIs for each use case and the method to measure these KPIs

- Identify the team of technicians and experts

- Identify the cases and service tasks in which the Fieldbit system will be used

- Estimate ROI for each use case

- Assign a project manager

- Prepare a tailored training program for each use case

During this step, the parties finalize a plan and time schedule for training and starting the evaluation and implementation processes.

Deliverables:

- ✓ Project vision

- ✓ Assignment of evaluation teams and project leaders

- ✓ Definition of schedule and milestones for the entire project

- ✓ Use case mapping and definition of process workflows

- ✓ Training program

2 Feasibility Testing

This phase represents the first practical experience with the system. It is conducted after a group of experts, field technicians and even selected end customers (i.e. where the vendor's equipment is installed) have been trained to use the Fieldbit technology. It is important to start with a relatively small and well-controlled group in order to receive meaningful feedback. Fieldbit provides an integrated and customized survey platform that enables both experts and remote users to provide feedback about their experience for each interaction. It is highly recommended to collect this feedback after completing each interaction with Fieldbit's solution.

IT and data security issues should be addressed at this stage in order to assure that Fieldbit security and data protection strategies comply with customer IT requirements and to verify that the network architecture and data communication plans are suitable.

Deliverables:

- Feasibility & user study
- Smart glasses selection and testing
- Practicing the new work process flows
- Change management, mapping and communication planning
- IT infrastructure

3 KPI Evaluation

During this step, the participants continue to perform their daily tasks with the new system and report about each interaction. Unlike in the Feasibility Testing step, now users and especially experts will provide feedback about KPIs in a dedicated survey form about business values (for example: did the system help resolve the problem, shorten resolution time, avoid a trip to a customer site, etc.). All information is collected and periodically analyzed in order to detect trends and estimate ROI. Both parties will handle scheduled reviews to analyze the trends and review any deviation from original plans. During this step, the parties will jointly plan the initial rollout schedule.

It is recommended to provide the solution to selected end users and discuss with them a business model and new types of SLAs. Communication with end users and marketing messages should also be defined at this stage.

Deliverables:

- ☑ KPI reports based on survey forms
- ☑ ROI estimates per use case
- ☑ New or adjusted work processes
- ☑ Start building a knowledge database
- ☑ Planning integration with other back-office systems
- ☑ Training materials

4   Initial Rollout

With the completion of the KPIs Evaluation stage and after reaching conclusions about ROI and business goals, the system can now be deployed in a few business units and teams. During the initial rollout the required changes to working practices, organizational structure and workflows are implemented. Continuous monitoring and measurement of KPIs are extremely important in the initial rollout stage and will help to reflect the deployment progress and achievement of business goals.

The initial rollout typically takes 3-6 months.

Deliverables:

- ROI analysis to support scale up
- KPI statistical reports
- Scaling up plan
- Scaling work processes
- Communication plan
- Ongoing change management
- Train the trainer program + OJT

5   Scale Up

As soon as the relevant goals are clear, the scaling up process can begin. This process will define a detailed operational plan for introducing the system to additional teams or business units across the organization, changes in organizational structure and work processes.

Deliverables:

- Integration plan with IT systems
- Internal training
- Moving to independent mode

Bottom Line: Driving Value from Field Services Transformation

Using Fieldbit's holistic implementation approach, enterprises can effectively achieve digital transformation of their field services across a wide range of use cases. Beyond remote assistance from experts to technicians in the field, the implementation of Fieldbit's solution enables service organizations to improve and define new workflows, capture and share practical knowledge, streamline communications within the organization and build new business models for selling SLAs and service related products.

Using Fieldbit, enterprises can create technical competence and support centers in which each expert can support multiple FSEs/FSTs, as well as guide customers wishing to resolve problems on their own. Fieldbit transforms the way field service organizations work, enabling them to increase remote resolution rates (RRR), improve first time fix (FTF) rates, and reduce overall operational costs.

Our implementation methodology converts the business case into real use cases and actual work processes so that enterprises can facilitate user adoption. By working hand-in-hand with a customer leadership team through every step, Fieldbit helps to align expectations and reduce the risk and uncertainty of the digital transformation process.

For more information,
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