

Field Service in 2016: The Technician's Perspective

A TSC Research Summary

There are significant transformations taking place in field service. Technology is changing the way work is created, distributed, and completed. Labor markets and demographic shifts are driving organizations to rethink the composition and make up of their front-line workforces. And changing customer profiles and needs are driving organizations to retool the services that are delivered in the field.

In 2015, TSC surveyed 180 service organizations regarding their field business performance. Fifty-four percent (54%) of organizations indicated that they had seen a year-over-year increase in total field visits, primarily tied to a greater volume of equipment out in the field. For these organizations, their major challenges were tied to:

- Injecting predictability into field service
- Developing a talent plan to support all kinds of service
- Constructing an IT infrastructure to support future field business growth
- Driving new revenue from work done in the field

In 2016, as a follow up to this project, TSC reached out to field technicians at these organizations to get a true feel of the impact of these pressures and changes on the front lines of field service. The intent of this project was to truly understand the day-to-day pressures felt by front-line field service agents and the steps that organizations can take to make these agents more effective in their work.

The project also presented a unique opportunity to get a peek at the profession of field service and the drivers that motivate these professionals to engage in the type of work that they do. While most of the heavy lifting in field service is typically done by these professionals, most field service research has typically ignored looking into or documenting their perspective.

Key Data Points (From TSC Respondents):

1. **94%** would recommend the profession of field service.
2. **60%** chose to become field service technicians in their professional lives.
3. **64%** were satisfied with the salary they received as field service technicians.
4. **77%** indicated solving customer problems was the favorite part of their day-to-day.
5. **46%** stated that paperwork and administrative tasks were the worst parts of their day-to-day.

About the Research:

In early 2016, The Service Council (www.servicecouncil.com) conducted 2 research surveys aimed directly at field service technicians. The technicians who participated were nominated by TSC member organizations.

Survey 1 focused on the field service profession and had 50 unique participants. Survey 2 focused on technology and had 106 participants. Some of the technician data can be seen on Page 6.

Respondent Statistics:

Size (Number of Technicians in Represented Organizations):

- 1- Less than 50 – 43%
- 2- 50 - 500 – 35%
- 3- More than 500 – 22%



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GETTING IN

Forty-six percent (46%) of field technicians polled indicated that field service was their primary choice of profession. That said, 63% chose to become field service technicians in their professional lives. Less than 30% pointed out that the choice to join the profession was made in academic years. This is an interesting statistic as it underlines how organizations need to start aligning with educational institutions to provide students with a flavor for field service work in their academic days. This is going to be vital when considering the fact that 70% of companies will face a field service talent deficit from retirement in the coming 10 years.

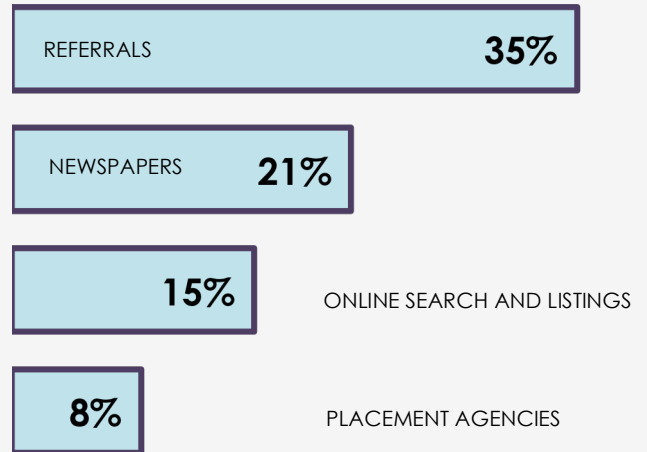
When asked about why they chose the profession of field service, a third of respondents indicated that they liked fixing and repairing things, and field service provided them the opportunity to repair for work. Others were looking for a career change and found field work to be interesting. Only 8% stated that they chose the work because it was the only work available at the time.

Those in the profession for 20+ years were two times as likely as those in the profession for less than five years to have chosen field service due to their academic upbringing and training. For those in the profession for less than 5 years, nearly 1 in 5 chose field service as a means to align with a company that they wanted to work for. None of the engineers with more than 10 years of experience indicated that their intention was to align with a corporate brand, regardless of type of work. This type of alignment is typical of newer generation workers and offers potential hirers a tool to leverage when luring and recruiting new talent.

DAY-TO-DAY - WORK

Most technicians we polled were satisfied with the day-to-day pressures and requirements of their work. As seen in Chart 2, they took a great deal of pride in solving customers' problems. Nearly a third indicated that working and dealing with customers was the

Chart 1: Finding Job 1



Percentage of Respondents. TSC Data 2016

Referrals were the primary means by which technicians found their roles. This rang true of when technicians sought their first roles as well as their most recent roles (chart not shown – 25% of technicians found their latest roles via referrals)

As would be expected, technicians with over 20 years of experience were more likely than others to have used newspapers to find their first roles. Where as those with less than 10 years of experience were more likely to have relied on online sources to find their first roles.

Channels that have become more popular for finding roles:

- 1- Online search and listings
- 2- Internal transfers
- 3- Placement agencies

Social channels are more popular now to find roles in the profession, however the number of technicians reporting success via these channels is still fairly low.

Less than 10% of technicians claimed to have found their first or latest roles via career placement services at their educational institutions. If anything, reliance on those mediums has gone down.



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best part of their day-to-day.

Its in looking at the worst (or least favorable) parts of their day-to-day where the information gets exciting. As seen in Chart 3, nearly 50% complained about the amount of time that they had to spend on completing paperwork and administrative tasks. This is the case, even in the time of mobility when a lot of paperwork has been removed with the use of mobile devices and applications.

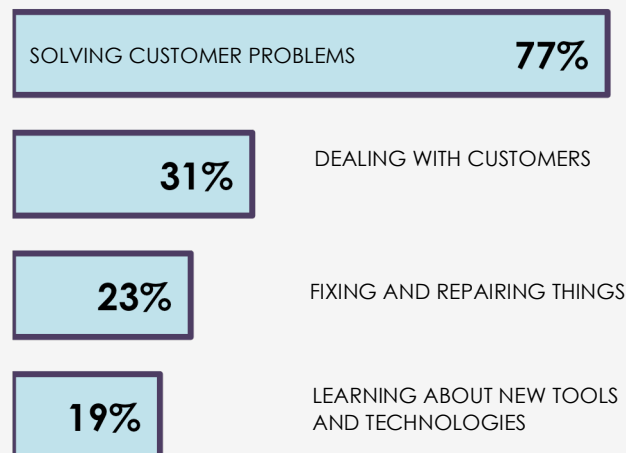
Its worth noting that only 32% indicated that they spent too much time on paperwork on a day-to-day basis, leaving us to believe that even though most technicians are mobile, most of their mobile time is spent on administrative tasks.

Nearly 30% of technicians were also dissatisfied with the time it took them to look for information. Once again, this is surprising given the increasing use of mobile devices and solutions reported by field service organizations. It raises the question of what type of information is made available on these applications. Most organizations are still stuck in providing the schedule and ticket management capabilities and aren't looking ahead to the type of information that is really seen as empowerment.

Twenty-one percent (21%) indicated that their field service work left them feeling isolated given the travel involved and the solitary nature of most field service work. While 21% might not seem as a significant number, it does present an opportunity for organizations to establish a higher level of collaboration and engagement among front-line field service agents. This can be done through more consistent communications, with the aid of collaborative communication and knowledge platforms, or via improved employee recognition.

The elimination of these challenges is seen as an effective way to improve a day in the life of field technicians. When TSC asked field technicians to offer their comments on how their daily work lives could be improved, the following were some of the key areas:

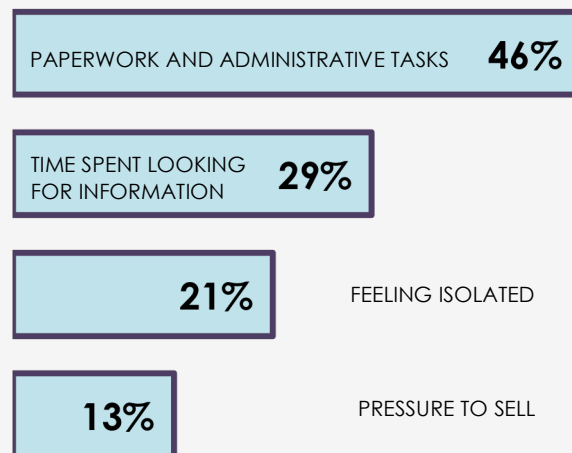
Chart 2: The Best Part



Percentage of Respondents. TSC Data 2016

Technicians like to work and prefer the removal of all obstacles to getting work done. Most we polled were fairly comfortable dealing directly with customers, a skillset or requirement that is going to become more important moving forward.

Chart 3: The Worst Part



Percentage of Respondents. TSC Data 2016

In looking at the least favorite parts of the day-to-day, the top two options in Chart 3 were represented in the same order for small and mid-size organizations (less than 50 and 50-500 technicians). At larger organizations, time spent looking for information wasn't in the top 2 and was superseded by isolation from the team and the pressure to work faster.

- a- Removal of obstacles in getting work done
- b- Provision of greater control in day-to-day work management
- c- Access to better information while in the field
- d- Increased incentives (monetary or otherwise) for field work, customer outcomes, and sales.
- e- Sales accountability for services sold and for follow up on service-generated business leads.

DAY-TO-DAY - TECHNOLOGY

Sixty-one percent (61%) of field technicians polled were satisfied with the technology demands of their work, but they still saw opportunities for improvement. This is evidenced in Chart 3.

All the technicians polled were leveraging a mobile device for the completion of field work. Our research of field service organizations reveals that while most organizations have invested in mobile tools and applications, not all are 100% mobile. Seventy-eight percent (78%) have deployed some form of mobile application for service, whether home grown or purchased, and 72% have equipped all their workers with mobile devices.

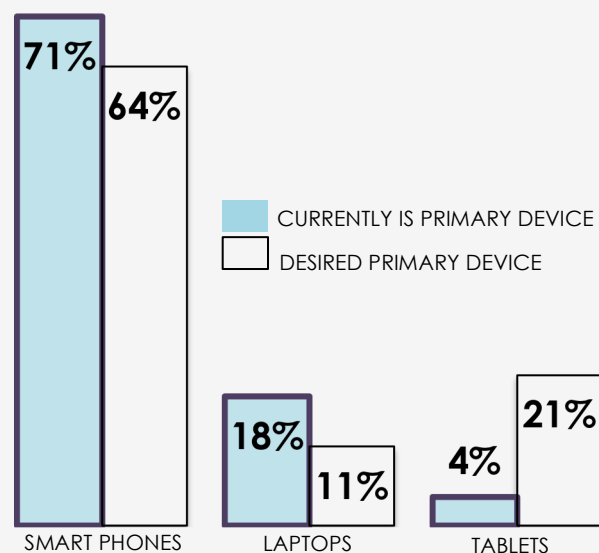
When we dig deeper into what is being used on mobile, and in what is desired, we get a better picture of the extent to which mobile information is provided in the field. The following are capabilities that are available and relied on by field technicians:

- Email (94%)
- Check in and check out (74%)
- Service ticket review and management (70%)
- Texting (63%)
- Navigation and Turn-by-Turn (63%)
- Schedule and PTO management (62%)

Areas that we believe to be vital for the effective completion of service work are not as available (percentage of availability shown)

- Pre-visit review of service history (54%)
- Access to service manuals (52%)
- Knowledge base access (48%)
- Spare parts inventory visibility (42%)
- Training videos (30%)

Chart 4: Tools of the Trade



Percentage of Respondents. TSC Data 2016

Our mobile research has indicated that most technicians have at least 1 device for service work. In most cases, 2 devices is the norm. Chart 4 presents the primary device used for the completion of service work. The results reflect a very smart phone heavy population in our sample base.

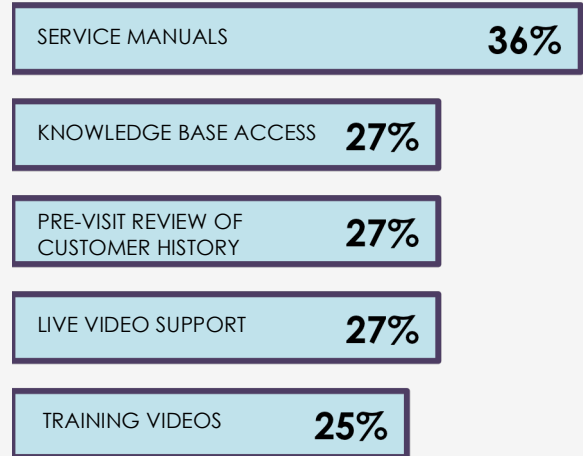
In our 2015 mobile device research, tablets were reported as the top evaluated device. For a large number of organizations this was the case due to the larger screen size and form factor of these devices. The greater availability of smart phones with larger screens also drives continued interest in smart phones. It is worthwhile to note that 33% of field technicians who have been in the industry for 20+ years would prefer to have a tablet as their primary device, compared to 14% of those who have been in the industry for less than 10 years. Seventy-two percent (72%) of those in the industry for 10 years or less would prefer to have a smart phone as their primary device. 32% of experienced technicians believed that they spent too much time on their mobile devices compared to 16% of those with less than 10 years of experience.

These are areas of mobile empowerment that companies must invest in order to enhance the service delivery experience. This is not our perspective, its that of the field service technicians in the form of a wish list of information and features that they would like to see on mobile (Chart 5).

Its worth noting that only 22% of technicians indicated that they had the ability to capture leads or opportunities in their mobile applications. Given the heavy emphasis from service organizations in having these technicians generate new revenue, a simple application for capturing new business leads can be quite powerful. TSC's past research has found that those organizations who generate more than \$1m in service-driven revenue are more than 2 times as likely to use formal lead capture systems. \$1m might seem like a small amount, but it's a start. Organizations, such as Tyco-SimplexGrinnell, have generated more than \$50m from their service leads program (www.servicecouncil.com/podcasts).

In terms of emerging technology, technicians were fairly positive with regards to the impact of remote connectivity, live video, and on-demand video resources. They believed that these tools could greatly impact the quality of their work and their ability to deliver as per customer needs. The jury was still out in terms of the value of things like Augmented Reality, Virtual Reality, and Smart Glasses. Most still saw these technologies as nascent tools that have yet to be proven in the enterprise. This belief was common across all field service technicians polled, regardless of tenure and level of experience. TSC firmly believes that there is maturity map for augmented and virtual reality tools in the field service enterprise. Forward leaning organizations are already experimenting with the use of these tools, primarily to support training initiatives. A centralized expert model is extremely lucrative to service organizations as it enables the maximization of expert time and knowledge while minimizing the inefficiencies associated with travel. That said, user adoption is key to the success of these tools, and service organizations would be wise to consider the technician feedback when investing in these solutions.

Chart 5: Mobile Wish list - Technicians



Percentage of Respondents. TSC Data 2016

Improving technician lives requires removal of obstacles to getting work done (Page 4). This is evident in the type of information that these agents would like to see on their mobile devices. The 5 areas highlighted above reflect an interest in improving resolution once at the customer site. These technicians want to avoid a secondary visit, not only because of cost, but because it reflects on their brand, professionalism, and quality of work. These are areas that technicians take very seriously and are therefore willing to work with tools that support resolution.

Chart 6: Future Technology Assessment

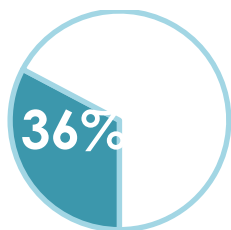
Technology	Percentage of Technicians Indicating POSITIVE impact
Training Videos (On-Demand)	82%
Internet of Things	66%
Live Video Support	65%
Augmented Reality	30%
Smart Watches/Bands	24%
Smart Glasses	19%

Percentage of Respondents. TSC Data 2016



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LESS THAN 10 YEARS OF EXPERIENCE



Found their first roles via online listings and search

On Improving a Day in the Life

"Give face-to-face feedback. Not always in email."

"Better technology. And improved collaboration between departments."

ON THE PROFESSION

Most Likely to:

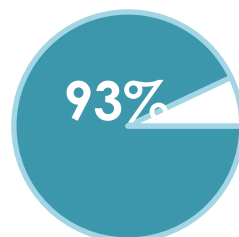
- Have found their first roles via online search and listings
- Enjoy learning about new tools and technologies
- Dislike feeling isolated from the rest of the team
- Be dissatisfied with available career opportunities

ON TECHNOLOGY

Most Likely to:

- Desire a smart phone as a primary work device
- Want live video support as a mobile capability
- Leverage knowledge base access
- Be positive on the impact of live video
- Be positive on the impact of smart glasses

10-20 YEARS OF EXPERIENCE



Like solving customer problems as the best part of their day-to-day

On Improving a Day in the Life

"Everyone be on the same page and having access to accurate notes."

"Overall incentives including work/life balance"

ON THE PROFESSION

Most likely to:

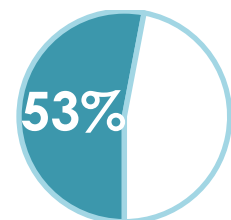
- Have found their first roles via referrals
- Have switched companies during their careers
- Be dissatisfied with salary and benefits provided
- Be challenged by the pressure to sell
- Like meeting and dealing with customers

ON TECHNOLOGY

Most Likely to:

- Want improved access to service manuals on mobile applications
- Want access to training videos via mobile applications
- Be positive on the impact of training videos

20+ YEARS OF EXPERIENCE



have worked for only 1 organization in their careers

On Improving a Day in the Life

"More appreciation while doing normal work and more certainty about the future"

"Let the employee take more control."

ON THE PROFESSION

Most Likely to:

- Have worked for 1 company in their careers
- Have chosen their profession in school/college
- Have found their first role via a newspaper
- Dislike being tracked via GPS

ON TECHNOLOGY

Most Likely to:

- Believe that they spend too much time on mobile devices
- Desire a tablet as a primary work device
- Want better visibility of spare parts inventory via mobile application
- Be positive on the impact of IoT



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OVERALL - WORK SATISFACTION

The field technicians we spoke to were mostly satisfied with the demands and rewards of their work. In areas such as salary and benefits, 65-70% were somewhat or very satisfied, compared to 20% reporting some level of dissatisfaction. Similar results and levels of satisfaction were seen in factors such as:

- Focus on safety
- Training provided
- Technology demands of work

In those areas, organizations are doing well to meet the needs of field service technicians. In two additional areas, there are opportunities for improvement.

Career and Learning and Development: While only 20% indicated dissatisfaction with career paths and learning and development opportunities, another 20% stated that they could see opportunities for improvement. This is essential in making field service a viable profession, wherein field technicians are provided ways to improve their skillsets and offered numerous paths of growth in the organization. A career path doesn't necessarily mean that a technician has to go from field agent to supervisor to manager to director, but that the agent has the opportunity to choose multiple options of improvement, enhancement, and advancement within the organization. As per our current research, only 48% of organizations offer career paths to their field service technicians.

Selling: Technicians were split in terms of their level of satisfaction with the pressure that is placed on them to sell. Most saw it as a trend that's coming whether they liked it or not, and were prepared to work with it especially if it led to improved solutions for customers. As opposed to direct selling, technicians were more open to advising customers and capturing leads and opportunities for future follow up. This was more in line with the role that these technicians would like to play. That said, the validity of lead capture programs and initiatives is tied to the dedication of the organization towards training, technology, and incentives. In the absence of these, lead generation programs at the service level are met with skepticism and are less likely to be embraced.

SUMMARY – FOR FUTURE GENERATIONS

Ninety-four percent (94%) of the technicians polled by TSC recommend the profession of field service. This support for field service was high across all experience levels. Most technicians were well aware of the increasing role that they play in connecting with customers, and of the impact that their connection with customers has in driving repeat business and increased revenue. In advising future technicians regarding an investment in a field service career, one of our respondents claimed:

"Our profession summarized: 90% customer service, 10% repairing products/appliances"

While field organizations are continually looking at automation to reduce the number of remedial service dispatches, there is still a great need for the human element when it comes to the next stage of field service growth.

Sumair Dutta is the Chief Customer Officer for The Service Council. He writes on topics of service strategy, customer support, emerging technologies, and field service.

sd@servicecouncil.com or @sumair