



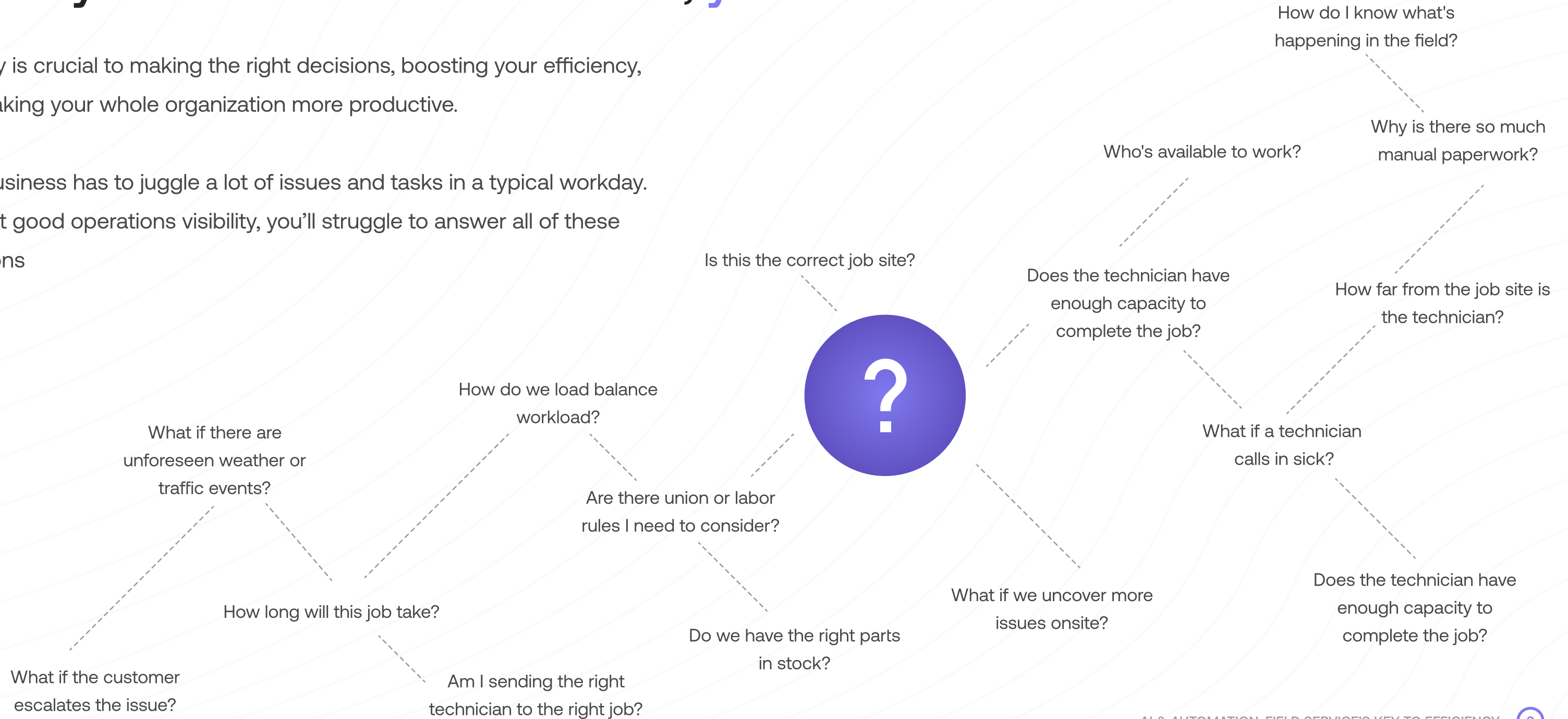
AI & AUTOMATION

# Field Service's Key to Efficiency

# If you're having trouble getting a grasp on in-field visibility and manual routine tasks, **you're not alone.**

Visibility is crucial to making the right decisions, boosting your efficiency, and making your whole organization more productive.

Your business has to juggle a lot of issues and tasks in a typical workday. Without good operations visibility, you'll struggle to answer all of these questions

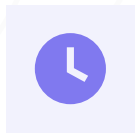


Unfortunately, many field service organizations don't have a good enough view into technicians' activities, take a reactive approach to dispatching, and wrestle with inaccurate forecasting. Without a strong grasp of their workforce's availability and skills, along with work order progress, issues, and documentation, you'll have a hard time analyzing your team's performance and data.

**Up to 40%** of a field service technician's workday is spent on non-value-adding activities – and poor visibility in the field makes it hard to fix the problem. So how do you get better visibility into your field operations? Your best bet is **artificial intelligence (AI) and automation**.

AI and automation give your organization three big benefits: real-time insights, process automation, and actionable recommendations. Each of these categories leverages AI and automation in different ways, and can drive different values for your team.



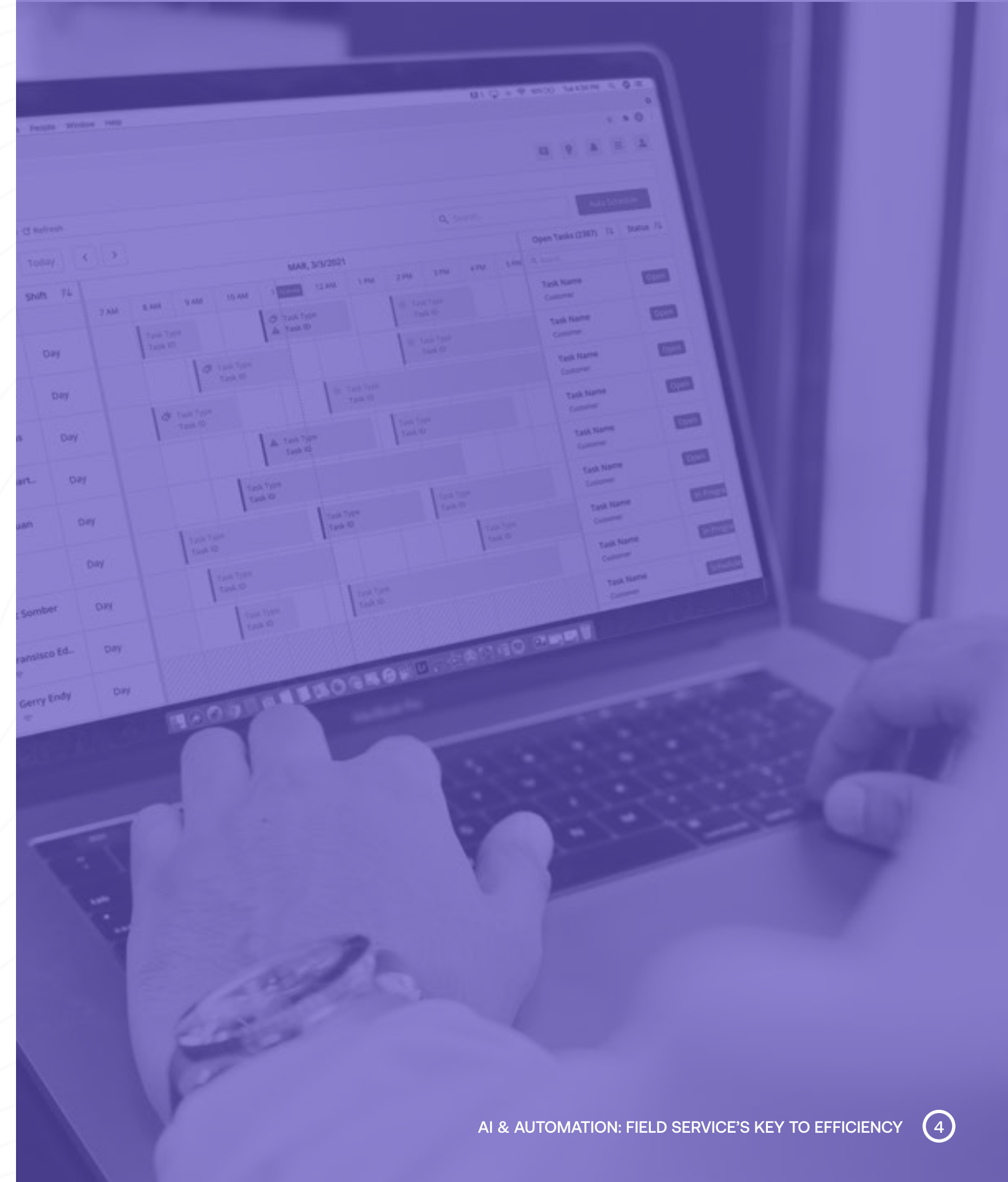


## Real-Time Insights

Where automation really shines is in giving you a real-time look into what's going on in the field. You can track and improve progress and performance on the fly, quickly correcting issues that affect efficiency.

AI and automation can double your technician and back-office productivity by breaking down the data siloes typical in large-scale field service organizations. Instead of your data living separately in ERPs, asset management tools, CRM, and other tools, you'll have a single source to visualize your data. That means clear operational dashboards with task-level tracking and management-level dashboards that gives you a view into all of your organization's projects.

The bottom line: getting real-time visibility helps management and back-office teams be more proactive and agile in managing day-to-day operations. You can spot problems as they happen and respond to them quickly, saving your back office team valuable time so they can focus on other important tasks. This helps your field and back office collaborate better to give your customers the best experience possible.





## Process Automation

Workflows are a really powerful concept that every AI-enabled organization should be using. They help streamline and standardize manual processes and actions. [Automating your workflows is key to improving your organization's overall efficiency.](#)

Automated workflows can be stateless (only focused on back-end processes) or stateful (leveraging external outputs in real-time to make a decision). They take non-value-added activities off your team's plate, freeing them to focus on value-added tasks (like solving critical in-field issues and managing customer relations).

Today, your coordinators spend 75% of their time juggling between emails, text, phone calls, etc., to update project status, coordinate activities, or build reports. Most of these tasks are routine, manual, and can be automated through workflows. This lets your team focus their energy on solving field issues.

Here's an example. Using automated workflows to create close-out packages, you can consolidate information across systems and send reports to the systems or stakeholders that need them. One mobile network operator who leveraged process automation reduced the time their coordinators spent on end-of-job data housekeeping by 80%.

To summarize, workflows handle specific actions in various business processes to streamline your operations. They can either run on their own or along with other workflows to take repetitive manual tasks off your team's to-do list. Effective workflow management can shorten a field service solution's time-to-value by **up to 55%.**



## Actionable Recommendations

This is where the power of artificial intelligence truly takes form. There is a great wealth of information living across your IT ecosystem: field data, customer data, financial information. Unfortunately, this information isn't leveraged to its full potential. Analyzing all of the data available, AI can help improve and speed up decision-making for your field service teams.

Actionable recommendations improve core operational metrics (i.e., first time fixed rate, mean time to resolution).

**Instead of just reacting to or chasing down problems, AI helps you identify potential problem spots before they pop up.**

For example, an **AI solution** can help:

- Recommend the right technician for each job, based on skills, availability, and/or location.
- Recommend the parts your technician will need, based on the job tasks and site conditions.
- Optimize routes to save time and fuel costs.
- Predict and monitor your field workers' task compliance.

# Three Tiers for AI & Automation

Of course, AI and automation can be best leveraged if your organization has the right infrastructure supporting them. A typical AI stack within a field service platform has three critical tiers: AI infrastructure, AI services, and micro-applications.



## Tier 1: AI Infrastructure

This is the technology foundation that enables developers to build, deploy, and monitor AI models. It includes critical components like data pipelines, model training, model deployment, and monitoring. Different models and micro-applications can be deployed leveraging the infrastructure to address a given business use case.

A good solution is easy to scale internally, using an event-driven architecture. It's quick to deploy, easy to manage, and has a user interface that helps you build customized AI use cases without a lot of development/coding time.



## Tier 2: AI Services

AI services build on top of the AI infrastructure to give you configurable tools to address a variety of business problems machine learning can address. They represent various AI and machine learning models that can solve different business problems.

Natural language processing (NLP), computer vision (training AI to process and understand images), and time series are few examples of models that data scientists can configure, train, deploy. They're the underlying tools allowing your data team to build customized use cases more easily than creating everything from scratch. This can dramatically speed up your time to value and alleviate the technical complexity required when starting from square 1 every time you have AI/ML use cases.

Data is the underlying enabler to any AI architecture. A wide range of historical and on-going operational, financial, and customer data will help your organization to appropriately train your AI use cases, ultimately improving their reliability and level of confidence.





### Tier 3: AI Micro Applications

Micro applications, or microapps, use one or more services in the platform to serve a specific business use case.

Using an almost no-code interface, you can configure an AI model customized to your organization's needs. Standard field service-specific use cases like grabbing text from an image taken by a technician to automatically fill out a form, predicting task compliance, and analyzing work orders to predict their priority are all valuable tasks that an AI/ML solution purpose-built for field services can offer. Generic AI platforms are not built with field service in mind, requiring customers to do the heavy lifting to apply it to their business needs.

Because they can cater to several field-specific use cases out of the box and allow easy customization, micro-apps help you find value almost immediately. You can deploy field service AI use cases without the need for data science. This gives your business analysts and developers a new string to their bow and can significantly decrease the total cost of ownership of your field service solution.



# AI & Automation: Field Service's Key to Efficiency

Think of the three AI tiers like building a house: AI infrastructure is the foundation, AI services are the hammers and nails, and AI micro-apps are the walls that support your specific use cases.

With these building blocks at your disposal, you can improve your entire team's efficiency and productivity, shortening your time to value.

Want to help your business become more efficient by automating workflows with a drag-and-drop solution?



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