



# 10 ways to get started with field service AI & Automation

**The hype is nonstop.** But you have a job to do – and reality to deal with. So when thinking about AI and automation in the real world that you deal with every day, how do you attack the challenges?

Our quick guide provides 10 tips to help you deal with AI, automation...and reality.

# 1

## Start with specific projects

Start small. Choose an initiative that is easy to enact with high pay off, like schedule optimization.



# 2

## Ensure data accuracy

Bad data will yield bad results. So, you'll likely need to do a data cleanup before you undertake AI initiatives. Data needs to be accurate, accessible, and able to be searched and organized in meaningful ways.



## Integrate AI into existing workflows

Automate key processes across business units and focus on practical applications, like giving customers a very narrow arrival window, based on projected travel times.

## 9 in 10

organizations back AI to give them a competitive edge over rivals

(MIT Sloan Management)



# 4

## Trust an industry partner

Let a trusted vendor be your guide and let it focus on research during your AI learning curve, so you can focus on your day-to-day operations—and what you do best.

## 4 in 5

Around 4 in 5 companies deem AI to be top priority in their business strategy (Forbes)



# 5

## Strive for continuous improvement

Focus on use cases with immediate, achievable goals that you can continue to refine as you make improvements and apply insight. Allow for a gradual ramp up and controlled expansion. Measure results and make incremental gains.

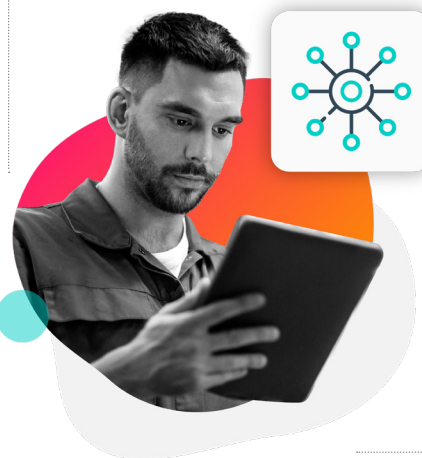
35% of businesses have adopted AI

(Authority Hacker)

# 6

## Automate processes

Streamline workflows and processes, removing unnecessary steps, redundancies, manual data entry, and time-consuming calculations. Rule-based automation is one of the most reliable, low-risk AI capabilities.



## 82%

of business leaders believe that AI enhances job satisfaction and performance



# 7

## Empower employees

Give employees, from call center agents to dispatchers and technicians, access to real-time data and tools to help them make well-informed decisions based on insights and rule-based recommendations. Train employees on when and how to trust AI tools.

## Focus on the customer experience

When choosing AI-driven initiatives to deploy, be sure to focus on ones that improve the customer experience. Shortening call-to-dispatch times and improving first call resolution rates are two important key performance indicators (KPIs) that will impact customer satisfaction.

# 8



## Identify risks and noncompliance

A modern field service solution with built-in intelligence will help you monitor for exceptions that need a closer look. Data that falls outside of the guardrails you set will be escalated to appropriate managers for review.

# 9

## Focus on savings and achieving return on investment (ROI)

Achieving ROI on your AI investment requires due diligence on reporting and tracking achievements. Sometimes the ROI isn't obvious. Improving workforce productivity will boost efficiency, meaning a technician may be able to complete more service calls per day. This can lead to more revenue. Reducing extra trips to the customer's location can save on fuel costs. Over time, these savings will help cover your investment.

## 40%

AI is expected to improve employee productivity by 40% (PwC)

## 80%

of retail executives expect their businesses to adopt AI automation by 2025 (Analytics Insight)

# 10

