



2018 North American Mobile Field-Service Management
Customer Value Leadership Award



2018
BEST PRACTICES
AWARDS

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Background and Company Performance

Today's Mobile Field Service Management Industry

Discuss Field service management (FSM) is an industry that enables and supports service personnel as they travel to, and work onsite at, customer locations. FSM solutions are utilized across a broad swath of industries. Examples of field services include installation/maintenance/repair of equipment, utilities monitoring, at-home health care, construction services, insurance appraisals, etc. During the last decade, mobility has become an increasingly important component of FSM. With mobile access, field service organizations can use GPS and other technologies on their mobile handhelds (smartphones, tablets, rugged devices) to locate, automate, and optimize their workers, tasks and results anytime and anywhere.

Mobilized capabilities typically include:

- Employee location and geo-fencing
- Mapping and navigation
- Time, labor and material tracking
- Data capture, including wireless forms
- Work order and activity management
- Scheduling, dispatching, route optimization
- Invoicing and mobile payments
- Contract and service level agreement (SLA) management
- Schematics and other relevant information/knowledge
- Reporting and analytics
- Two-way messaging and collaboration

The mobilized field service management market continues to demonstrate impressive growth, with annual revenues forecasted to total in the billions of dollars. The majority of mobilized FSM solutions originate out of three vendor types: Mobile-first application developers (shrinking in number due to being acquired), traditional field service management solution providers (who have added mobile access to their original desktop-only offerings), and large enterprise software suite vendors (who have mobilized the field service elements of their desktop-based solution suites). While a group of small mobile-first developers created this market, it is the full participation of traditional FSM vendors and enterprise business software leaders that has injected new R&D funds into mobilization. This investment has enabled vendors to improve the user experience, add new capabilities, and advance in innovative areas such as wearables, predictive analytics, 3-D visualization, augmented reality, etc.

Mobilized field service management solutions have become a popular choice for field service organizations. The 2018 Frost & Sullivan Mobile Business Solutions Survey reveals that 67% of North American field services businesses have implemented mobile FSM to at least some degree. And two-thirds of those current users plan to expand their implementations within the next 12 months. Satisfaction levels among current users are very high—89% in the 2018 survey—and are based on hard-dollar business impacts. Benefits, as reported by users, are ranked as follows:

- Improved field service response times
- Reduced paperwork
- Increased end-customer satisfaction
- Improved competitive advantage
- More accurate billing
- Faster trouble ticket resolution

Heightened end-customer expectations are both a transformational trend and an industry challenge. Today's customers are more demanding when it comes to the quality, timeliness, and responsiveness of field service work. Their time is valuable, their days are filled, and up-to-date information such as a field technician's expected time of arrival (not some 3-hour window) is increasingly expected. As a result, a major mobilized FSM investment area during the past year has been creating and enhancing the customer portal. Market leaders are offering online portals that share information, allow appointment bookings, track tech location, provide ETAs, etc. The results include quicker trouble resolution, happier customers, and even increased sales.

Other growth areas and opportunities for mobile FSM include tighter solution integration, leveraging of the wearable form factor (for example, pairing smart glasses with augmented reality), expert management of the growing population of contract field service workers, and enhanced business intelligence and analytics.

While the mobilized field service management market continues to present a dynamic and growing opportunity, challenges do exist for its vendors and channels. These include:

- *Determining when and how to incorporate new technologies into product and portfolio* – Mobile field service management portfolios should not be allowed to stagnate, especially in light of the new technologies and capabilities being uncovered in this market and promoted by fellow competitors. Today's business customers – large and small -- provide sophisticated, market-savvy responses when asked about their mobility needs and preferences. Mobile FSM leaders will want to determine on a timely basis if and how to address these interests and when to integrate them into their product road maps.
- *Selecting the right partners in order to improve capabilities and/or open up new markets* – Leading mobile FSM providers do not operate in a vacuum. In order to offer the highest-quality solutions, they leverage acquisitions and alliances to build

an effective partner ecosystem. They are challenged to seek out technology partners that can help expedite time-to-market for new capabilities. And they must define the optimal mix of channel partners to augment their coverage in different geographies and target markets.

- *Anticipating and addressing the evolving role and status of field service workers* – A decade ago, most field service workers were invisible to their companies, their supervisors, and their customers. There was no mobile access, so the worker was isolated and disconnected when outside the four walls of his or her company. Then inexpensive mobile smartphones and tablets came onto the market and FSM apps were created to allow field personnel real-time access to and exchange of information, collaboration and guidance via their personal or corporate-owned mobile devices. This resulted in increased productivity, improved efficiency, and higher work quality.

Now, leading FSM providers are anticipating that a new type of field service employee will be deployed during the coming years -- and these providers are thinking through how best to support that new type of worker. For example, this tech may need more remote-based enablement, utilizing technology like augmented reality to quickly tap into far-away expertise. The tech may work more closely with field supervisors—rather than a call center—to pick and choose dispatching assignments. Tighter integrations may give the individual worker fuller access to their company's back-end systems. And third-party contracted techs are being increasingly utilized. Mobility is a key component in addressing all of these situations. And leading providers are being challenged to visualize and plan for this new, more independent reality.

- *Maintaining a strong emphasis on ease of use* – As many field service management providers learned the hard way, creating mobile solutions requires a different skill set than that used to develop desktop applications. Unwieldy, difficult to use, hard-to-understand mobile apps are rejected by the field workers, and many vendors still struggle today to provide an optimal user experience. Respondents to the 2018 Frost & Sullivan Mobile Business Solutions Survey rank “ease of use” and “ease of administration” in the top four of mobile app selection criteria, reinforcing the need for providers to continue to place a high priority on both the user and admin experience.

In summary, the North American market for mobilized field service management solutions is growing in terms of both usage and needs. Today's end-customer is demanding a higher level of service, and field service organizations are looking to mobile FSM to help satisfy that demand. Mobile FSM providers must be nimble and forward-looking, anticipating customer and worker requirements, forging top-tier partnerships, and investing wisely.

ServicePower's Customer Impact and Business Impact

Mobile technology has allowed field service management providers to build richer connections with their customers and, as a result, offer a higher value-add to each client's individual service experience. ServicePower judges the success of its Field Service Management line according to how it enables and enhances the "customer journey" in field service. And one way this leader optimizes customer value is to weave mobility and its anywhere-anytime presence throughout the ServicePower suite of offerings.

ServicePower enjoys strong brand recognition as an FSM provider. It was acquired by Diversis Capital in early 2017, which is making major investments in product development. ServicePower is currently privately held.

Key success factors that make it possible for ServicePower, Inc. to provide strong, positive customer value in the mobilized field service management market are presented below:

- *Powerful mobile capabilities throughout the field service management portfolio* – ServicePower's end-to-end FSM suite contains the following major components:
 - Customer Engagement
 - Smart Scheduling
 - Mobile Tech Enablement
 - Contractor Management
 - Work Order Management
 - Inventory, Asset & Contract Management
 - Warranty Claims Management
 - Reporting and Analytics

Mobile technology is leveraged in a number of these modular offerings, including customer engagement, contractor management, and work order management. The central mobility solution, however, is the Mobile Tech Enablement module. An impressive and comprehensive array of Mobile Tech capabilities is available directly on the field technician's mobile device, including:

- Ready access to all job, customer, and asset information
- Extensible mobile forms; Customizable workflows and surveys
- Real-time mapping, navigation, and GPS location updates
- Real-time route and traffic tracking and live ETA updates
- In-field payment processing, quotes, estimates, invoicing
- Customizable surveys
- Access to an extensive inventory parts catalog; Ability to manage inventory

parts orders

- Time card management
- Triggers and alerts
- Signature, video, and photo capture
- Real-time collaboration with off-site teams
- Ability to dispatch work orders

ServicePower places high value on ease of use and ownership. Very importantly, this same platform can be used with both W2 and 1099 (sub-contractor) field employees. And, as a web-based application, Mobile Tech Enablement is available across a variety of mobile operating systems and form factors.

- *Best-in-class contractor management solution* – Field service organizations are increasingly making use of third-party, contracted field technicians to provide greater coverage and enable faster job resolution. ServicePower is at the forefront of managing and enabling this process for today's field service business. Its unique Contractor Management module allows a company to seamlessly credential and on-board contractors who can then be directly managed and dispatched using mobile technology.

Four major activities are addressed in the Contractor Management offering:

- **Servicer Set-up:** This step-by-step wizard gathers initial information documents (regarding insurance, taxes, etc.) for review by administrators.
- **Credentialing:** This process conducts extensive checks on criminal background and also performs drug testing and health screening if required.
- **On-Boarding:** Field service organizations can tailor this authorization process and ensure the completion of any required training materials.
- **Servicer Profile:** The servicer's profile is created and covers skills, experience, geographic preference, various capacities and capabilities, etc. This is the kind of information that makes it possible to select and dispatch the optimal service provider for any specific job.

ServicePower has instituted an extremely thorough screening process, cross-referencing records from multiple sources. The two major competitors analyzed do not have this level of capability. The Contractor Management solution then selects qualified contractors based on multiple criteria, books and dispatches these contractors in real time, and provides the service tech with access to a fully mobilized portal. In terms of optimizing customer value, this forward-looking solution reduces risk, decreases costs, makes it possible to take full advantage of surges in customer demand, and expands geographic coverage and revenue potential.

- *Strong focus on post-service feedback from customers* – ServicePower offers a

consumer portal offering to its customers which, among many other capabilities, offers end-customers the opportunity to re-open service tickets or provide service feedback after a tech visit. In a world of increasingly demanding consumers, these post-service capabilities are designed to generate higher customer satisfaction rates, reduce churn, improve tech utilization, and reduce call center volumes (and cost). This post-service emphasis is unique.

- *Visionary partnerships to enable emerging technologies* – Today’s businesses and their field service organizations demonstrate a high level of sophistication when responding to the 2018 Frost & Sullivan Mobile Business Solutions Survey queries regarding various new/emerging technologies. As a result, mobile FSM providers are advised to anticipate customer need, map out technology implementation plans, and clearly communicate those plans to their clients.

A key success factor in making these plans a reality is the ability and willingness to partner with top-tier technology vendors. ServicePower has established a number of significant partnerships aimed directly at leveraging mobility and enhancing customer value in the field. One example is its partnership with Help Lightning, Inc. Help Lightning “develops and delivers mobile communications, collaboration and cognition through merged reality and virtual interactive presence.”¹ In other words, it provides AR (augmented reality) technology here and now – typically to provide an on-site field technician with assistance from a remote expert.

Another impressive partnering example enables much of ServicePower’s Internet of Things (IoT) efforts. Ayla Networks provides a cloud-based IoT platform-as-a-service solution that ultimately creates proactive work orders and enables predictive field service.

¹ www.servicepower.com/partners

Conclusion

The field service management industry is on a strong growth trajectory in North America, and one of its major growth drivers is mobility. ServicePower has taken a number of steps to lead on providing a high level of customer value in this market. The company has woven mobile access throughout its impressive Field Service Management suite, allowing field techs, contract employees, and end-customers to connect in real time and exchange information and guidance. ServicePower has also developed specific capabilities targeted at real customer needs in the areas of third-party contractor management and post-service support. ServicePower is also forging a number of mobility-based partnerships that promise transformational capabilities and impressive value-add during the coming months.

For its strong overall performance, ServicePower, Inc. has earned Frost & Sullivan’s 2018 Customer Value Leadership Award.

Significance of Customer Value Leadership

Ultimately, growth in any organization depends upon customers purchasing from a company and then making the decision to return time and again. Delighting customers is, therefore, the cornerstone of any successful growth strategy. To achieve these dual goals (growth and customer delight), an organization must be best-in-class in three key areas: understanding demand, nurturing the brand, and differentiating from the competition.



Understanding Customer Value Leadership

Customer Value Leadership is defined and measured by two macro-level categories: Customer Impact and Business Impact. These two sides work together to make customers feel valued and confident in their products' quality and long shelf life. This dual satisfaction translates into repeat purchases and a high lifetime of customer value.

Key Benchmarking Criteria

For the Customer Value Leadership Award, Frost & Sullivan analysts independently evaluated two key factors—Customer Impact and Business Impact—according to the criteria identified below.

Customer Impact

- Criterion 1: Price/Performance Value
- Criterion 2: Customer Purchase Experience
- Criterion 3: Customer Ownership Experience
- Criterion 4: Customer Service Experience
- Criterion 5: Brand Equity

Business Impact

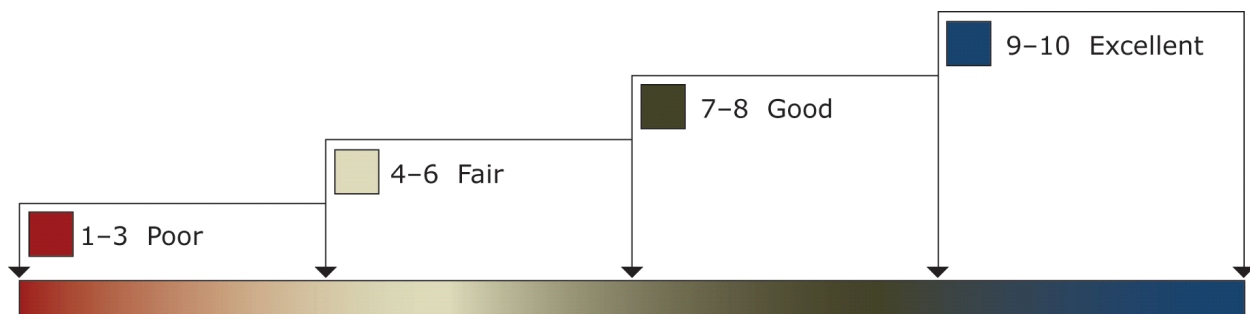
- Criterion 1: Financial Performance
- Criterion 2: Customer Acquisition
- Criterion 3: Operational Efficiency
- Criterion 4: Growth Potential
- Criterion 5: Human Capital

Best Practices Award Analysis for ServicePower, Inc.

Decision Support Scorecard

To support its evaluation of best practices across multiple business performance categories, Frost & Sullivan employs a customized Decision Support Scorecard. This tool allows our research and consulting teams to objectively analyze performance, according to the key benchmarking criteria listed in the previous section, and to assign ratings on that basis. The tool follows a 10-point scale that allows for nuances in performance evaluation. Ratings guidelines are illustrated below.

RATINGS GUIDELINES



The Decision Support Scorecard is organized by Customer Impact and Business Impact (i.e., These are the overarching categories for all 10 benchmarking criteria; the definitions for each criterion are provided beneath the scorecard.). The research team confirms the veracity of this weighted scorecard through sensitivity analysis, which confirms that small changes to the ratings for a specific criterion do not lead to a significant change in the overall relative rankings of the companies.

The results of this analysis are shown below. To remain unbiased and to protect the interests of all organizations reviewed, we have chosen to refer to the other key participants as Competitor 2 and Competitor 3.

<i>Measurement of 1–10 (1 = poor; 10 = excellent)</i>			
Customer Value Leadership	Customer Impact	Business Impact	Average Rating
ServicePower, Inc.	10	10	10
Competitor 2	9.5	9.5	9.5
Competitor 3	8	8	8

Customer Impact

Criterion 1: Price/Performance Value

Requirement: Products or services offer the best value for the price, compared to similar offerings in the market.

Criterion 2: Customer Purchase Experience

Requirement: Customers feel they are buying the most optimal solution that addresses both their unique needs and their unique constraints.

Criterion 3: Customer Ownership Experience

Requirement: Customers are proud to own the company's product or service and have a positive experience throughout the life of the product or service.

Criterion 4: Customer Service Experience

Requirement: Customer service is accessible, fast, stress-free, and of high quality.

Criterion 5: Brand Equity

Requirement: Customers have a positive view of the brand and exhibit high brand loyalty.

Business Impact

Criterion 1: Financial Performance

Requirement: Overall financial performance is strong in terms of revenues, revenue growth, operating margin, and other key financial metrics.

Criterion 2: Customer Acquisition

Requirement: Customer-facing processes support the efficient and consistent acquisition of new customers, even as it enhances retention of current customers.

Criterion 3: Operational Efficiency

Requirement: Staff is able to perform assigned tasks productively, quickly, and to a high quality standard.

Criterion 4: Growth Potential

Requirements: Customer focus strengthens brand, reinforces customer loyalty, and

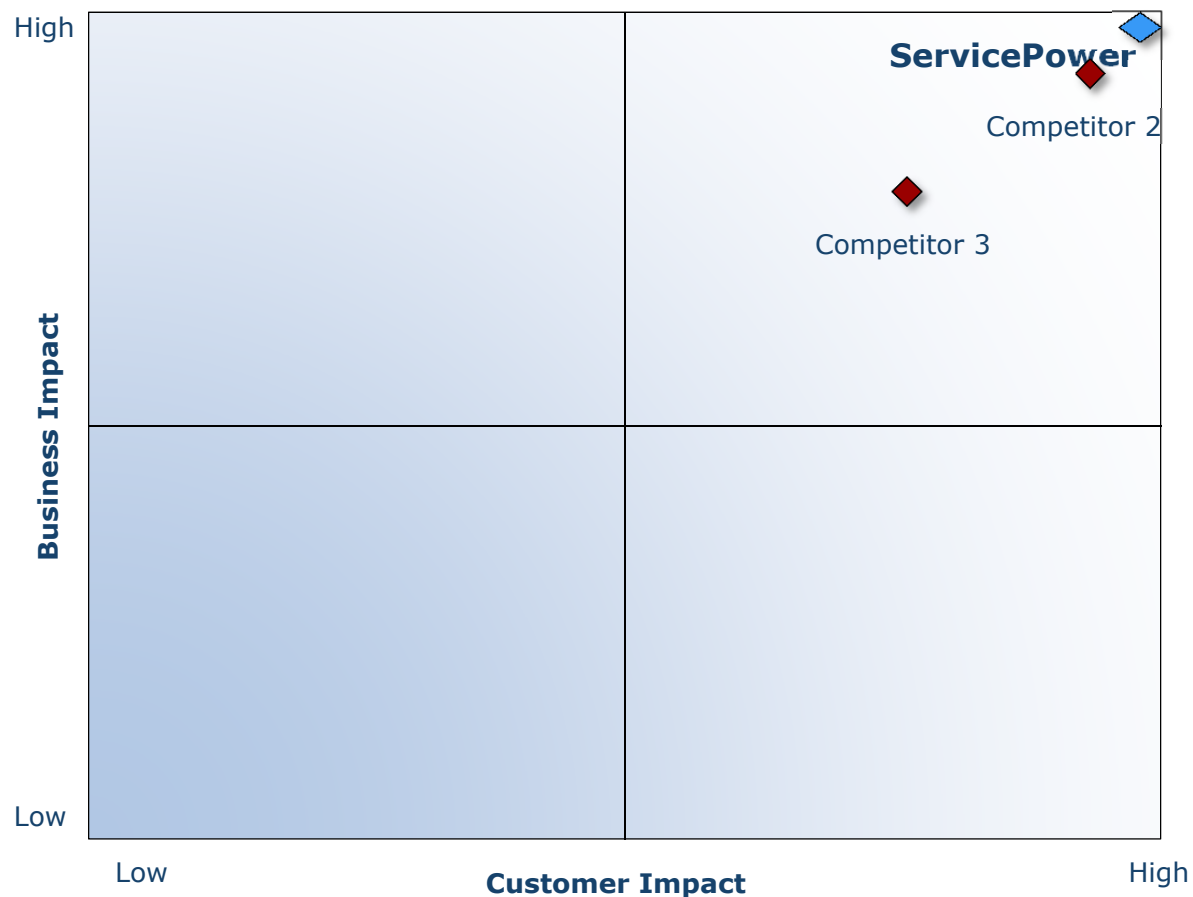
enhances growth potential.

Criterion 5: Human Capital

Requirement: Company culture is characterized by a strong commitment to quality and customers, which in turn enhances employee morale and retention.

Decision Support Matrix

Once all companies have been evaluated according to the Decision Support Scorecard, analysts then position the candidates on the matrix shown below, enabling them to visualize which companies are truly breakthrough and which ones are not yet operating at best-in-class levels.



Best Practices Recognition: 10 Steps to Researching, Identifying, and Recognizing Best Practices

Frost & Sullivan analysts follow a 10-step process to evaluate Award candidates and assess their fit with select best practice criteria. The reputation and integrity of the Awards are based on close adherence to this process.

STEP	OBJECTIVE	KEY ACTIVITIES	OUTPUT
1 Monitor, target, and screen	Identify Award recipient candidates from around the globe	<ul style="list-style-type: none"> Conduct in-depth industry research Identify emerging sectors Scan multiple geographies 	Pipeline of candidates who potentially meet all best-practice criteria
2 Perform 360-degree research	Perform comprehensive, 360-degree research on all candidates in the pipeline	<ul style="list-style-type: none"> Interview thought leaders and industry practitioners Assess candidates' fit with best-practice criteria Rank all candidates 	Matrix positioning of all candidates' performance relative to one another
3 Invite thought leadership in best practices	Perform in-depth examination of all candidates	<ul style="list-style-type: none"> Confirm best-practice criteria Examine eligibility of all candidates Identify any information gaps 	Detailed profiles of all ranked candidates
4 Initiate research director review	Conduct an unbiased evaluation of all candidate profiles	<ul style="list-style-type: none"> Brainstorm ranking options Invite multiple perspectives on candidates' performance Update candidate profiles 	Final prioritization of all eligible candidates and companion best-practice positioning paper
5 Assemble panel of industry experts	Present findings to an expert panel of industry thought leaders	<ul style="list-style-type: none"> Share findings Strengthen cases for candidate eligibility Prioritize candidates 	Refined list of prioritized Award candidates
6 Conduct global industry review	Build consensus on Award candidates' eligibility	<ul style="list-style-type: none"> Hold global team meeting to review all candidates Pressure-test fit with criteria Confirm inclusion of all eligible candidates 	Final list of eligible Award candidates, representing success stories worldwide
7 Perform quality check	Develop official Award consideration materials	<ul style="list-style-type: none"> Perform final performance benchmarking activities Write nominations Perform quality review 	High-quality, accurate, and creative presentation of nominees' successes
8 Reconnect with panel of industry experts	Finalize the selection of the best-practice Award recipient	<ul style="list-style-type: none"> Review analysis with panel Build consensus Select recipient 	Decision on which company performs best against all best-practice criteria
9 Communicate recognition	Inform Award recipient of Award recognition	<ul style="list-style-type: none"> Announce Award to the CEO Inspire the organization for continued success Celebrate the recipient's performance 	Announcement of Award and plan for how recipient can use the Award to enhance the brand
10 Take strategic action	Upon licensing, company is able to share Award news with stakeholders and customers	<ul style="list-style-type: none"> Coordinate media outreach Design a marketing plan Assess Award's role in future strategic planning 	Widespread awareness of recipient's Award status among investors, media personnel, and employees

The Intersection between 360-Degree Research and Best Practices Awards

Research Methodology

Frost & Sullivan's 360-degree research methodology represents the analytical rigor of our research process. It offers a 360-degree-view of industry challenges, trends, and issues by integrating all 7 of Frost & Sullivan's research methodologies. Too often companies make important growth decisions based on a narrow understanding of their environment, leading to errors of both omission and commission. Successful growth strategies are founded on a thorough understanding of market, technical, economic, financial, customer, best practices, and demographic analyses. The integration of these research disciplines into the 360-degree research methodology provides an evaluation platform for benchmarking industry participants and for identifying those performing at best-in-class levels.

360-DEGREE RESEARCH: SEEING ORDER IN THE CHAOS



About Frost & Sullivan

Frost & Sullivan, the Growth Partnership Company, enables clients to accelerate growth and achieve best-in-class positions in growth, innovation and leadership. The company's Growth Partnership Service provides the CEO and the CEO's Growth Team with disciplined research and best practice models to drive the generation, evaluation and implementation of powerful growth strategies. Frost & Sullivan leverages more than 50 years of experience in partnering with Global 1000 companies, emerging businesses, and the investment community from 45 offices on six continents. To join our Growth Partnership, please visit <http://www.frost.com>.