

## **Service Management Software: A Productive Solution and Necessity for Efficient Tech Service Dispatch and Work Order Management**

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### **Introduction:**

After all warning and doubt we have landed into a mess of a US economy. We now battle through rising oil and food prices and a collapse of the housing and banking industries. Sure there are some issues with the economy recently, but that hasn't had its effect on the Telecommunications, Internet Technology, Security and Service industries as a whole, where technological advances are creating a number of new opportunities for companies to expand their business and continue growing their operations. Revenues continue to stream in as the major players continue to find new ways to reach profits.

In this paper you will find out how you can continue to beat this recession and find new ways to maximize your company's revenue and productivity through the use of service management software leaving your competitors in the dust. Service management software is the solution to your dispatching, work order management, scheduling, inventory tracking, invoicing, reporting, accounting, customer service, lead management, route optimizing, and help desk needs. It offers an all encompassing solution for the service industry by fulfilling every department's need and serving as an operational backbone for a service company of any size.

### **What are the specific problems facing service companies today?**

The issues that have faced the service industry are felt by many companies in other sectors including telecommunications, security, and information technology. While growth in these sectors is still on the horizon and productivity levels may see a decline and profit margins will not reach their potential. New technological advances continue to create more opportunities for businesses to reach new customers. While retaining past customers is always important and cost effective, these new paths guided by advanced technology has brought businesses early success and left paper work piling up making keeping track of new clientele inefficient and cumbersome.

Layoffs, budget cuts, and downsizing have been a necessary solution to combat slumping profits and companies have cut down on budget spending in key areas such as technology departments. Software purchases are on the decline however service management software is a great replacement for lost employees. Instead of paying annual salaries for multiple employees to run several departments such as inventory, invoicing, dispatch, scheduling, and project management you can instead consolidate the departments and look for the right software to streamline efficiency. Below are the

average salaries for several key positions covered by most service businesses. Use these figures to help calculate a return on investment when shopping for service management software.

Industry	Annual Salary	Hourly Wage
Maintenance & Repair	\$39,930	\$19.20
Protective Services	\$38,750	\$18.63
Construction & Extraction	\$40,620	\$19.53
Services Managers	\$71,892	\$34.56
Dispatch Coordinators	\$34,780	\$16.73

\* All Statistics courtesy of the Bureau of Labor Statistics and are current to 2007

Many service businesses are stuck in their ways of managing the work order process with paper systems and handling dispatching with Microsoft Excel or in house whiteboard methods. Dispatching and scheduling can be created and implemented through Excel spreadsheets and CRM can be tracked through extensive paper file records and hand written notes. While these methods are main staples for many companies, the process of tracking, servicing, and fulfilling all employee and customer needs is cumbersome. While these systems are easy to teach and implement, they are impractical in the long run and highly inefficient. With advances in customer relationship management (CRM) software, customer service histories are an easy yet vital solution to efficiently track and integrate with the many uses you will implement the client information. From creating a work, service or install order to shipping, dispatching and ending with invoicing, customer information is passed around and constant updates to records need to be kept for a complete customer service history. Companies have gotten around the inevitable conclusion of implementing service management software by using several different non-integrated solutions for each department function.

A common deterrent to purchasing new software solutions is how well that software will grow as your company grows and if it can be easily updated to compete with changing business technologies. Archaic software systems are costly to update and time consuming to reestablish a correct process for your specific business. Choosing a company that is constantly improving upon their software to meet the needs of an ever changing environment is essential in this competitive industry. While most service management solutions do not vary a great deal, the company themselves do and it leads to a lot of turnover between clients switching between software vendors.

A key ingredient to purchasing new service management software is making sure it can integrate and synchronize with your existing irreplaceable software and business systems. Many accounting software solutions are useful additions for a complete service management solution such as QuickBooks, Peachtree, ACCPAC, and Microsoft Dynamics GP. Some service management software packages will have built in

accounting systems that can achieve a similar result as many standard accounting tools in the marketplace, but will offer better integration. It is also vital to make sure the software is flexible enough to integrate further with other applications you may need down the road as your company grows.

Service management software is meant to streamline your whole business process and do so it must fit in with how your company works. A company's structure can vary depending on how many remote users you have and how they access company data. Software can be fully web-based, installed on a backend server or a combination of both. Most web-based solutions are great for nationwide or worldwide franchised companies while a server client structure will work for many one office companies or can be implemented into several offices. Web-based functionality is a growing necessity for the mobile workforce for field service companies. If technicians out on the field have access to their work history and are provided with the right tools to process service orders they can do so efficiently and correctly.

When choosing service management software be sure to define your specific needs and what you need to be sure you get everything out of your software on a daily basis. Software can be easily customized to support just about anything you could imagine and being sure you cover all your bases will assure you have selected the right choice. When coming up with these specific needs be sure to keep in mind you want your company to grow and you want your software to grow with you. Be sure to find a solution that will grow with you and suit your needs no matter what the size of your company is. We are in a volatile market and you will need this software to help pick up work force efficiency.

Service management software is an all encompassing solution therefore it needs to also have built in help features to manage the knowledge of sales, dispatch, work order, technicians, and all aspects of your software. Training is vital so be sure your workforce is fully aware of all the software has to offer and that they are using it properly in holding all your company's service information. Knowledge management assures employees are aware of the quirks of your business and also the interaction your employees have with the software.

Of course the main function of service management software is to streamline and manage a variety of your business's processes. This should be your desired outcome to reach your goal of more profits. With the use of best practices integrated in your software you will have an edge up on your competitors and in turn your customers will notice your commitment to them.

Many service industries are expected to grow in the coming years and you need to be sure you can capitalize on all your opportunities. The worldwide telecommunications market is expected to grow at a compound annual growth rate of 9.2% from 2008 to

2011. This makes the United States about \$1.3 trillion of the 2011 market according to the Telecommunications Industry Association (TIA). The Information Technology market is always growing with the rapid development of new technologies and the growing need for educated professionals to fill this budding industry.

### **How will your company benefit from service management software?**

If you have chosen the correct service management software solution you should see an immediate return on investment. For less than the price of an employee's yearly salary you can implement software capable of tracking all service department needs. Productivity will be greatly increased due to a streamlined process through best practices research providing you the tools necessary to thrive in your industry. Knowing what it takes to succeed and having a tailored solution for your specific company will make you realize where your faults and strengths are as a service company and how you can improve upon your business process.

The software itself can replace laid off employees as it can serve the same roles such as recording service information, inventory managing or invoicing. If you are forced to lay off these key personnel positions for only a fraction of their salary you can employ software that will do their tasks efficiently and automate the services they once provided for your company.

Many service management software users will attest to the same thing. Implementation of a customer relationship management system leads to an increase in revenue because communication as documentation for each lead or customer provides your company with priceless contact information. When you know about a customer and avoid asking the same questions over and over the customer will respond positively and be friendly when dealing with your staff. Having a working knowledge of customers and their interaction with your products and services also makes a lot of other departments more efficient such as invoicing or dispatch that possesses the latest and most updated records of their clients.

The most critical benefit from service management software is having a work order management process in place to track and record all steps of customer service to fit each department's specific needs for handling clientele. With one easy access point to customer information, dispatching, scheduling, inventory, invoicing, accounting, sales, marketing, and many other departments can come together and share valuable information making your business system flow positively.

Good service management software is built based on best practices of your industry and with one major underlying focus. Make a company more productive and efficient to raise revenue and profits. Through business analysis you can create the necessary reports you need to analyze your company's various departments and look

toward making corrections to enhance business flaws. Understanding your weaknesses and turning them into strengths is the best way to show both employees and customers sustainable growth in your company.

### **What should you look for when searching for service management software?**

Many service companies have turned their back on hand writing and physically filing service orders, customer and leads information, and using numerous software titles to fulfill dispatching, accounting, inventory, invoicing, and scheduling needs. The solution for a complete service management software resolution is one that can streamline all of these aspects with one entry point accessible by all departments.

Another important factor to consider is the emergence of web accessibility in the work field. Many companies are turning toward service software that can provide remote entry to customer, work order, and scheduling information when you may be away from the office or out in the field. Customers are trending toward requesting service support through the internet or email as opposed to phone. If these are increasing habits of your employees and customers you should make sure to find a solution that will fulfill your future needs and requests.

Integration with enterprise software is a key issue when selecting a service management software solution. Many companies promise they can synchronize and integrate with numerous accounting, scheduling, reporting, and data server packages, but fall short time and time again. Be sure to research and look at customer reviews on how well a software has integrated with your specific software needs to know whether or not a company has delivered on their promise in the past.

While most businesses have the same needs they do not all interface in the same way. Different companies require unique fields and specialized categorization to achieve everyday tasks that a similar business may not require. To assure you are going with the right solution you must establish that your software can adapt to your certain industry needs and specific company procedures. The telecom industry for instance will be more focused on telephone equipment, parts, and service as opposed to an IT company which will focus more on computer hardware, software and system or network configurations. All of these require unique fields that may not be available with most out of the box solutions. Keep in mind your service management software needs to adapt and mold to your specific needs as opposed to your company molding into make a better fit for the software.

Credibility for your software developer is essential to make sure they will be around to support your company as it grows in the future as well as a good way to make sure their software will fulfill guarantees and promises. Testimonials, case studies, reviews, partnerships, referrals, awards, and references are all great ways to find out more

about a software developer as well as what some other companies in your industry may be doing to solve their needs.

Here is a technical reference to all the components in a complete service management solution:

***Customer Relationship Management (CRM)*** – Handling your contact with customers in an organized, well documented fashion is vital for a service company's ability to run operations smoothly. CRM involves entering information into the software system, so it can be accessed and entered by employees in different departments, such as sales, marketing, customer service, training, management, human resources, and accounting. CRM is a main staple in service management however it will not work unless employees commit to the system so that they can achieve optimal results.

***Sales Force Automation (SFA)*** – A feature of any CRM or service management system is the need to make things easier on your sales force and by streamlining the sales process. Ensure sales efforts are not duplicated and eliminate the risk of irritating customers with a well documented and tracked sales process. Keep your office in sync and assure every one is in the loop when it comes to how you are handling your leads and customers.

***Order Management System (OMS)*** – Entering in work item orders can be a cumbersome process, but with an OMS you capture customer proprietary information and account level information with ease. Once payment processing is complete the order is then processed for warehouse fulfillment, such as picking/packing/shipping. Under an order management system both your service and install departments are given detailed work histories of customers keeping your company aware of customer service histories.

***Inventory Tracking*** – Every service company has extensive part, assets, package, and inventory lists that are used for every service or work order. Inventory management is a vital element to a service business and must be closely followed. Inventory control and management consist of tracking sales, purchasing, manufacturing, shipping, pricing, and ordering. There are several choices of entering and tracking of multi-location inventory, LIFO/FIFO, bar coding, order creation, JIT, and average costing standards.

***Project Management*** – The goal of a project management component is to plan, organize, and manage resources to complete a specific proposal by achieving all project goals and objectives successfully. The management of projects requires achieving all of these goals or objectives under specific constraints of scope, quality, time, and of course budget. In addition all constraints will need to meet pre-defined objectives and will need to do so in an optimized approach of integrated allocation of resources. Project management software must help all involved in the process to handle and track all

activities to achieve efficiency and cover all tasks to complete proposals in a more productive and automated fashion.

***Dispatch/Scheduling*** – Assigning workers or vehicles to customers on the field is vital to all service companies. Proper dispatching and scheduling requires knowledge of all company assets and inventory to know who and what is available to send to which customers and to know the best route to optimize each field technician’s schedule.

***Contract Management*** – Administration of contracts made with customers, vendors, partners, employees or subcontractors includes documentation of all terms and conditions negotiated between all parties. This would include invoices, purchase orders, contracts, intellectual property, partnerships, warranties, and signatures or services performed. Efficiently managing contract creation, execution, and analysis for the purpose of maximizing financial and operational performance and minimizing risk must be handled and documented properly.

***Accounting*** – Accounting can be implemented outside of the software using another software package or included within for an all encompassing solution. Either way it must be synched up with customers, invoices, inventory, orders, and all areas of your business to assure proper records. Tracking all billing/invoicing for both accounts payable and receivable is vital for a company to assure proper cash flow and to not miss out on revenue opportunities.

***Help Desk*** – Also known as knowledge base management, this feature offers your employees and customers full access to troubleshooting and any pertinent information regarding your products and services. A strong help desk or knowledge base should be kept to date and widely used by employees to keep every customer and co-worker on the same page as far as what your company can offer.

***Business Intelligence (BI)*** – Data analysis of built out forms or reports custom tailored to your company’s specific process are essential to properly keep a business running to its full potential. Through visual analysis and proper analytics tools you can decipher all data to draw business conclusions to change key aspects of your company and give detailed reports to employees, management, and customers.

***Data Storage*** – When it comes down to it, every company looking for a software solution needs somewhere to store their data and provide sufficient data backups. This task is difficult and involves proper security protocol and regular upkeep to assure all data is backed up to minimize any data loss, corruption or infiltration.

When choosing a service management software vendor make sure you have answers to these important questions:

- Is the software web hosted? Or server/client based in house?
- Will the software be accessible for my mobile work force?
- Is all my external software and data properly integrated?
- Have I met the specific needs of my company & industry by choosing this software?
- What is the scale of deployment? Departments? Users? Training?
- What is my expected return on investment?

### **What can High 5 Software do for my service management software needs?**

High 5 Software has come up with an enterprise service management solution to cover any business size. With the new release of Service Management Enterprise (SME) any company in need of streamlining their service process can do so at an affordable price with this all encompassing solution.

SME will provide you with the tools to track and manage your company's customers, inventory, service orders, projects, equipment, technicians, contracts, leads, invoices, documents, and much more. High 5 Software proudly boasts the industry's best service management package to integrate with QuickBooks software and also holds a proven track record of finding cost effective solutions of partnering and integrating SME with enterprise software to deliver a personal and all inclusive service management solution to its customers.

The software is based on licenses for concurrent users and can support more employees depending on how many departments and the amount of employee usage within each department that will be using the software. Setup and installation can be handled by your own IT department or with the help of our friendly technical support whom you will have the opportunity to get help and support for free during your first year of use of the software.

### **For More Information:**

Visit [www.high5software.com](http://www.high5software.com) to learn more about High 5 Software's products and solutions tailored toward your industry and request a free fully functional demo to try for yourself by filling out a trial request form. We offer detailed information on our plethora of software features that will help streamline your business and encourage any and all questions to further clarify what our software can do for your company. If you are interested in contacting one of our qualified staff members to find out if High 5 Software is a right fit for you feel free to call 1-800-585-1696 or email [sales@high5software.com](mailto:sales@high5software.com).



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