VIDEO COLLABORATION IN THE FIELD: SEE THE PATH TO RESOLUTION

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Report Highlights

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The Best-in-Class are 69% more likely than their peers to have implemented live collaborative video tools to loop in remote experts.

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The Best-in-Class are 70% more likely than their peers to provide technicians with access to a knowledge base of recorded training videos.

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The Best-in-Class are 43% more likely than their peers to provide technicians with access to social media / collaborative tools to facilitate knowledge transfer.

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More than half of the Best-in-Class (56%) stated that the top purpose of social tools was for training.

This report highlights the increased use of collaborative video tools in field service to ensure technicians have the information and skills to solve problems on a first visit.

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The concept that everything you need is available on-demand is becoming quite common. This trend is beginning to show up in the B2B service world too…

The expectation of instant gratification seems to be a way of life these days. No one is willing to wait for dinner, a cab, or even a DVD to be shipped to them in a little red envelope. The concept that everything you need is available on-demand is becoming quite common. This trend is beginning to show up in the B2B service world too, where customers demand service on their schedule and the service team must have the right answers when they need it. These answers are more frequently coming from video capabilities enabled through the use of mobile devices in the field. As seen in Aberdeen Group's BYOD: A Flood of Devices in the Field report (December 2014), on average, technicians carry two devices to complete their service work. The advancement of technology has led to many of these devices having video capabilities which can be accessed in the field.

If a Picture is Worth a Thousand Words, What's a Video Worth?

➔ Read the full report, "BYOD: A Flood of Devices in the Field"

Most of us have a smart phone in our pockets, which, if we use it correctly, has the capability to record, stream, and disseminate videos telling our daily stories. Have you checked out YouTube, Vine, or any of the other video sharing social channels currently available? What is really intriguing is how these tools are being used outside of the personal realm. Historically, social channels were used either as a microphone (i.e., to inform what someone was currently doing or thinking) or as a way to have a virtual conversation. These are still uses for social, but now video is being used as a tool for training, confirmation that work has or is being done, and as a way to resolve issues in real-time. The Best-in-Class are beginning to adopt live collaborative video tools to connect the field with remote experts in real-time (Figure 1).

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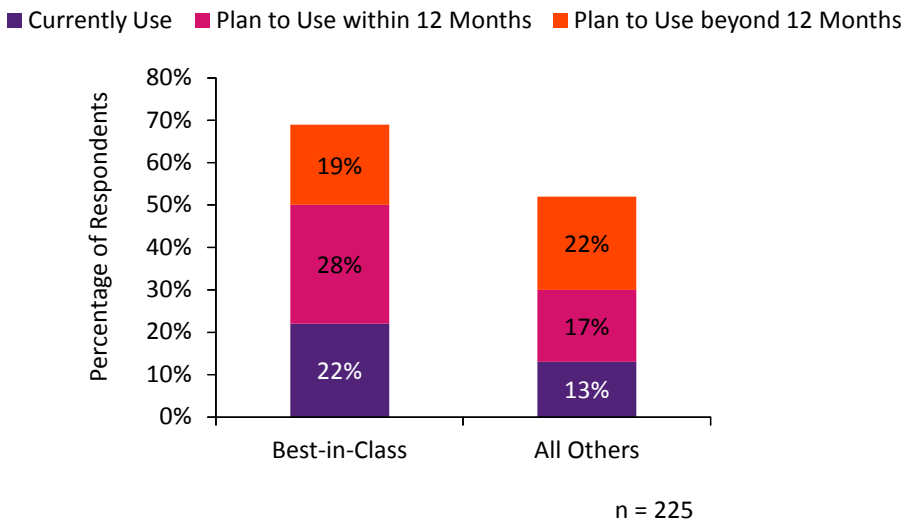
Figure 1: Live Video is How We Now Learn & Communicate



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Source: Aberdeen Group, July 2015

These top performers are 69% more likely than their peers to have this capability in place, but it's significant to note that these companies are also planning on increasing the use of this technology in the coming months and years. The future of video collaboration for B2B companies and service organizations shows promise as the technology becomes more advanced and tailored for business value. Also, as more service organizations migrate from paper-based processes to mobile empowered field teams, the use of collaborative tools (i.e., social, video) will, likewise, continue to rise. Mobility is reaching a point of ubiquity, and the wave of millennials coming into the service workforce will make video collaboration a norm in the coming months and years (see Aberdeen research on Millennials in service).

Connect the Field to Real-time Knowledge

Video capabilities are not only about connecting a technician to a remote expert. For example, in environments where customers are not on site with a technician (i.e., utilities, facilities management, telecommunications), a video stream can provide

The Field Service Workforce Management Best-in-Class Defined

In the January 2014 Field Service Workforce Management study, Aberdeen used three KPIs to distinguish the Best-in-Class (top 20% of aggregate performers) from the Industry Average (middle 50%) and Laggard (bottom 30%) organizations, with the mean performance amongst the Best-in-Class as follows:

- 88% performance in first-time fix rate
- 81% performance in worker utilization
- 13.1% annual improvement in worker productivity

Definition

Millennials, or Gen Y, refers to the demographic cohort with birth years ranging from the early 1980s to the late 1990s.

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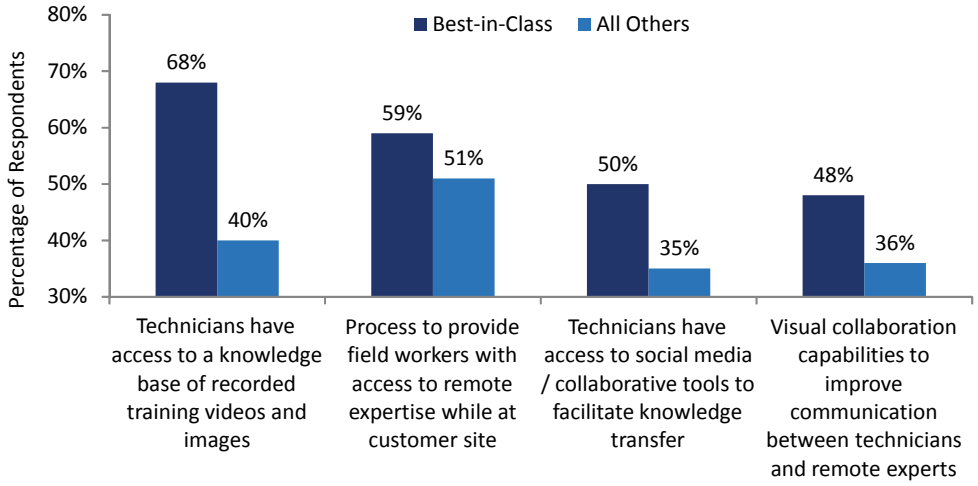
No longer are technicians' careers over if they don't desire to work on the front lines of field service. Collaborative video tools allow service organizations to have remote experts tap into the field and assist techs with real-time help.

confirmation that work is being done and has been completed in accordance with a contract. Historically, photos or an inspection were needed to confirm completed work; now, video provides a real-time and dynamic view into service. Video tools have allowed the Best-in-Class to connect the field with remote experts, customers, new skills training, and their peers in real time (Figure 2).

Figure 2: Video Tools Give Techs the Insight to Work Better



n = 225
Source: Aberdeen Group, July 2015

➔ **Sharing knowledge from a distance** – Organizations are beginning to find that their technicians and field experts can have a second career as back-office support team members. No longer are technicians' careers over if they don't desire to work on the front lines of field service. Collaborative video tools allow service organizations to have remote experts tap into the field and assist technicians with real-time help. Enhanced streaming video tools enable a back and forth which moves beyond the guesswork that a phone conversation alone provides. Video gives the remote expert a view into the actual

failure and greatly enhances the chances that resolution will be reached on a first visit.

- **Training in the field** – As seen in Aberdeen's *Social Field Service: Collaboration on the Fly* report (March 2015), the top way in which social tools are being used for Best-in-Class service organizations is for training purposes (56% vs. 47% for All Others). Learning by video is quite cost effective and efficient. Instead of having to bring the entire field team into the office or headquarters, the service organization can just upload and push out new best practices or procedures. This allows the team to be productive and learn as needed. Rarely do two people learn the same way; therefore, having on-demand learning tools available to the service team allows technicians to learn at their own pace.

- **Peer-to-peer assistance** – Technicians are often off on an island, delivering service and support away from the back office or in a specific territory of their own. But despite this remote world technicians live in, they don't always have the answers to solve the problems that they encounter. Mobility helps to close this gap of knowledge by connecting technicians to their peers. Video tools help technicians share insight, questions, and notes with their peers to help solve problems.

➔ Related Research, "Social Field Service: Collaboration on the Fly"

Tap into Expertise in Real Time

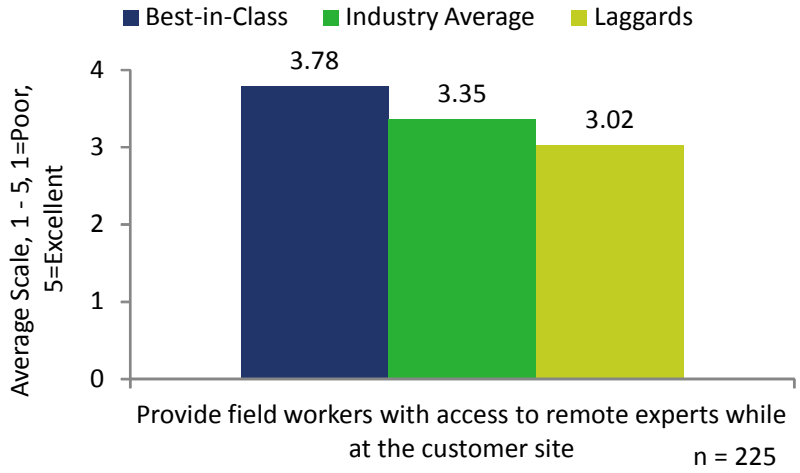
The changing field worker demographic threatens the amount of expertise on the ground. As seen in Aberdeen's *Field Service Workforce Management: Empower Tech 3.0* report (May 2015), one of the top challenges facing field service teams is an aging workforce which, in turn, highlights the potential for lost skills and knowledge. To mitigate this impending risk, Best-in-Class

➔ Read the full report, "Field Service Workforce Management: Empower Tech 3.0"

Top performers are using advanced technologies such as video capabilities to provide a high level of information, expertise, and communication to solve problems efficiently and in a timely manner.

organizations are putting measures in place to ensure that technicians can tap into the right expertise for any job — whether it's their own knowledge, that from another field technician, or even an exchange with a back office remote technician or support person (Figure 3).

Figure 3: Expert Assistance in the Field



Source: Aberdeen Group, July 2015

Resolution is key to service excellence. Customers demand service done right the first time. In mission-critical industries such as oil & gas, telecommunications, or renewable energy, downtime comes at a very high cost. Ensuring that, if there is a failure, any technician can get on site quickly, diagnose the problem, and resolve the issue on a first visit differentiates a Best-in-Class field service team. And this capability is not an easy endeavor; these top performers are using advanced technologies such as video capabilities to provide this level of information, expertise, and communication to solve problems efficiently and in a timely manner.

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Key Takeaways

Service has to move at the speed of customer expectations, which is fast. Competition has made the need for speed imperative. For this reason, service organizations have to provide the field with the tools to always be an expert and ensure that issues can be solved the first time a technician is on site. Video capabilities have empowered the field with the knowledge and collaborative tools to share, solve, and capture service issues. The Best-in-Class have implemented collaborative video tools to excel and others should look to some best practices to mirror this level of success:

- **Don't lose productivity due to off-site training sessions.** A training day back in the office isn't quite a day off, but it does take the field team away from resolving customer issues. Mobile devices provide the ability to move training sessions into the field. Furthermore, mobile training tools provided through video allow this insight to be accessed on-demand when needed, as opposed to a static session which may not be used for some time.

- **Create experts on day 1.** The complexity of equipment has made service more difficult. Not every technician has seen every issue they will encounter on a service call. Video collaboration allows a technician to tap into the right answers to a difficult problem regardless of tenure or knowledge.

- **Verify quality service resolution.** Customers demand resolution and quality service. But a customer isn't always on-site to confirm service has been completed. In order to avoid disputes over service completion or confirm that a future problem isn't associated with work

already completed, video has the ability to validate service. Having the ability to capture, store, and access video gives both the customer and service organization more than just peace of mind; they both get confirmation of a job well done.

For more information on this or other research topics, please visit www.aberdeen.com.

Related Research

Field Service Workforce Management: Empower Tech 3.0; May 2015
Social Field Service: Collaboration on the Fly; March 2015
State of Service Management 2015: Connect to Your Customers; March 2015
Emerging Workforce in the Field: Tech-Savvy to Technician; December 2014

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About Aberdeen Group

Since 1988, Aberdeen Group has published research that helps businesses worldwide improve their performance. Our analysts derive fact-based, vendor-agnostic insights from a proprietary analytical framework, which identifies Best-in-Class organizations from primary research conducted with industry practitioners. The resulting research content is used by hundreds of thousands of business professionals to drive smarter decision-making and improve business strategy. Aberdeen Group is headquartered in Boston, MA.