

F R O S T & S U L L I V A N

# BEST PRACTICES

AWARDS

F R O S T & S U L L I V A N

2020 BEST PRACTICES AWARD



**2020 NORTH AMERICAN  
MOBILE FIELD SERVICE MANAGEMENT  
CUSTOMER VALUE LEADERSHIP AWARD**

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## Background and Company Performance

### *Industry Challenges*

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, manage, 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 mobile dynamic 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, dashboards, and analytics
- Messaging and collaboration tools

The mobilized field service management market continues to demonstrate impressive growth, with annual revenues totaling in the billions of dollars. While a group of small mobile-first app developers generated today's mobile FSM market, new players and investment have 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 mission-critical for field service organizations. The 2019 Frost & Sullivan Global Digital Solutions Survey reveals that 86% of North American and European field services businesses have implemented mobile FSM to at least some degree. And the vast majority of those current users plan to expand their implementations within the next 12 months. Satisfaction levels among current users are very high and are based on hard-dollar business impacts. Benefits, as reported by users, are ranked as follows:

- Increased end-customer satisfaction
- Enhanced customer engagement
- Improved field service response times

- Improved competitive advantage
- More accurate billing
- Reduced paperwork

End-customer expectations around value remain heightened and continue to function as 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 expected. In response, leading providers have provided field service organizations with end-customer portal offerings that share information, allow appointment bookings, track technician 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 more vertical-specific solutions, sharpening predictive service capabilities, improving post-sales communications with clients, and tighter solution integrations.

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* – This is an industry that will not stand still, so participants are constantly challenged to stay tuned into customer feedback and stay knowledgeable regarding emerging technology trends and capabilities. Today's business customers – large and small – provide sophisticated, market-savvy responses when asked about their mobility needs and preferences. Mobile FSM value 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. Now, leading FSM providers are anticipating a new type of field service employee, and these providers are thinking through how best to support the more autonomous and tech-savvy worker. Mobility is a key component in enriching the field technician experience. And value leaders are being challenged to visualize and plan for this new, more independent worker 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 field workers, and many vendors still struggle today to provide an optimal user experience. Respondents to the 2019 Frost & Sullivan Global Digital Solutions Survey rank “ease of use” as a Top Two mobile app selection criterion, reinforcing the need for providers to continue to place a high priority on this key user requirement.
- *Effectively neutralizing any COVID-19 dampening impact on sales* – Positioned properly, mobilized field service management solutions can be viewed as a way to protect the safety and health of both customer and technician.

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.

### *Customer Impact and Business Impact*

When identifying providers that are demonstrating a best-in-class approach to competing in the mobilized field service management industry, FieldAware stands out with its emphasis on optimizing customer value. FieldAware’s strategies in the areas of portfolio, partnerships, and integrations reflect the company’s expert understanding of customer requirements in a constantly evolving industry.

Major success factors behind this Customer Value Leadership award designation include the following:

#### **“Rapid Time to Value”**

FieldAware field service management solutions are offered in a cloud-based as-a-service format, with predictable monthly per-user subscription pricing invoiced via an annual contract. Discounts and bundled pricing can be applied based on the use case, number of users, and/or implementation complexity.

Affordable Total Cost of Ownership (TCO) is a key value proposition for FieldAware and a high priority for customers. FieldAware optimizes its solution’s TCO by charging competitive prices and shortening time-to-market. Faster solution deployment results in lower implementation costs and fulfills FieldAware’s promise of “rapid time to value.” Once the solution is in place, FieldAware customers report a 30+% increase in profitability and a 22+% improvement in their end-customers’ satisfaction levels.

The FieldAware value proposition is also enriched by the company’s mobile-first approach to product design and development, providing an optimal user experience in the field. In multiple Frost & Sullivan surveys, businesses identify more efficient business processes and more productive employees as their strongest reasons for deploying mobile applications to their workforce. FieldAware is able to point to an expanding array of case studies that prove out both the hard- and soft-dollar impacts of their mobilized offerings.

In comparison, Competitors #1 and #2 also utilize the more affordable subscription pricing model and charge somewhat similar prices. Neither, however, seem to place as high a value

as FieldAware does on quick deployment intervals. And neither can claim to be a mobile-first FSM vendor.

### **Optimized Customer Purchase Experience**

FieldAware targets organizations with 50-500 field technicians, moving upmarket to the growing mid-sized and emerging enterprise segments. Frost & Sullivan has identified multiple ways in which FieldAware optimizes its customers' FSM solution purchase process, including:

#### *Comprehensive Portfolio*

The FieldAware solution consists of an impressive set of core features plus additional optional modules for more complex deployments. Core capabilities that are included in the company's base price are as follows:

- Work Order Management
- Asset Management
- Workforce Management
- Crew Management
- Customer Management
- Scheduler Board
- Planning Mode
- Reports and Insights
- Mobile Application
- Open RESTful API

The mobile application itself offers a comprehensive mix of components, including:

- FieldAware Mobile Technician Enablement: Native iOS and Android applications, barcode scanning, photos, videos, signature capture, text to speech, map driving, customer communications, task management and more.
- Knowledge Management
- Alerts and Notifications
- Offline capability
- Mobile Forms for standard data capture
- Employee Timesheets, plus Clock In and Out
- Invoicing and quoting in the field, i.e. generating invoices and quotes on the mobile device or in the back office

A compelling list of modules that are each available for an additional fee includes the following:

- Customer Portal
- Smart Scheduler
- FieldAware Forms
- Enterprise Model
- Insights Report Builder
- Payment in the Field
- Prepackaged Connectors for NetSuite, Salesforce, QuickBooks



The FieldAware portfolio is not only designed to help provide the prospective customer with a rich, curated set of core capabilities; it provides the assurance and peace of mind that additional modules are available as customer needs change and expand. The top FSM product priorities that surface in Frost & Sullivan research are all reflected in the FieldAware portfolio, including these highest-priority capabilities: Scheduling and route optimization, dynamic mobile forms, time and labor tracking, mobile payment, and a customer portal.

#### *Expert Sales Support*

FieldAware maintains its own professional sales team. It also operates in a referral mode, co-selling with technology and channel partners such as Netsuite, Salesforce, and their respective systems integrator partners. When these parties recognize a field service management sales opportunity, they bring in FieldAware reps and their substantial domain expertise, ensuring that the prospective customer purchase experience is of the highest quality. Functioning as the FSM interface, the FieldAware team can knowledgeably answer questions, advise on appropriate offerings, and expedite the overall sales process.

Directly or with partners, FieldAware sales representatives have successfully managed both short and long cycle work and have addressed the needs of an impressive array of companies, including mid-market businesses such as Maser Consulting (engineering services), Slush Puppie (manufacturing), and Fox Commercial Services (commercial HVAC and plumbing).

A comparison of the Competitor #1 and #2 purchase experiences reveals that FieldAware offers a richer set of capabilities, including add-on modules, in multiple areas. FieldAware's top-tier assortment of capabilities, paired with expert sales support from knowledgeable FieldAware representatives, optimizes the customer purchase experience.

#### **Rich, Supportive Customer Ownership Experience**

Customers are becoming increasingly sophisticated in their expectations around field service management solution performance. The quality of today's ownership experience is especially crucial because the as-a-service model makes it easier for disgruntled customers to churn out and look elsewhere. FieldAware recognizes this dynamic and focuses on maintaining a rich post-sale relationship with its customers. Areas of emphasis include:

##### *Identifying and addressing key integration needs*

The value of a field service management solution increases exponentially when it is integrated with related services and systems that customers value and regularly use. FieldAware recognizes this need and has made integration a top strategic priority.

Frost & Sullivan views FieldAware's integration capabilities as a key differentiator. The company encourages customers to view the FieldAware platform as a hub that integrates FieldAware with the customer's legacy ERP, asset management, and CRM systems, thereby efficiently distributing work and capturing rich data. The FieldAware platform includes an open RESTful API, allowing partners to create these tighter workflow integrations. FieldAware also provides prepackaged connectors for NetSuite, Salesforce, and QuickBooks as separate add-on modules. The hiring of a new Vice President of Client Services in late 2019 also brought new and deeper integration expertise to the company and its Professional Services team.

For customers interested in pursuing specific areas of augmentation, FieldAware has forged a dynamic set of best-of-breed solution extension partnerships:

- ThingTech: IoT and Predictive Analytics
- Ubimax: Virtual Reality, Augmented Reality and Remote Assistance
- Localz: Customer communications and Uber experience, tracking engineer to the customer's door
- 3Plenish: Mobile inventory management
- Occlly: Lone worker mobile monitoring applications
- Square: Credit card payment in the field
- DOMO: Business intelligence and data visualization
- ProntoForms: No code/Low code dynamic data collection forms

This list is regularly expanded to include new partnerships and capabilities that reflect and anticipate evolving customer needs.

#### *Post-sale communications and support*

Building and maintaining a high-touch post-sale relationship with current FSM customers offers vendors the opportunity to not only quickly flag trouble spots, but also identify sales expansion opportunities. Frost & Sullivan research reveals that the overwhelming majority (80+%) of North American businesses currently using a mobilized field service management solution expect to expand their implementations over the near term.

Recognizing this opportunity, FieldAware has put in place a number of post-sale communications and support efforts that are largely managed by its Client Services organization, including:

- Creating a Customer Success Team that is charged with 1) ensuring that the customer is using the platform, 2) staying current regarding user needs, and 3) introducing and explaining new, relevant solution capabilities
- Proactively monitoring customer work flows, identifying any issues, and working with the customer to expeditiously address problems
- Running surveys, including the company's August global study examining the future of field services and COVID-19 impacts. The resulting feedback will be used to produce a detailed benchmarking study to be published during Third Quarter 2020.
- Planning forward to create more two-way discussion via a customer advisory board and user group events

Neither Customer #1 nor #2's integration and technology partner ecosystem, post-sales communications strategy, or thought leadership efforts are as comprehensive as FieldAware's at this time.

#### **Pursuing Growth Upmarket**

The FieldAware solution addresses a wide range of use cases while, at the same time, making hard strategic decisions regarding just where its growth markets reside. The company has moved away from the SMB sector and has sharpened its focus and R&D efforts on the larger and more complex mid-market and emerging enterprise segments (50-500 field technicians). These upmarket businesses are in a growth mode, and many have determined that it's time to move away from their legacy or build-your-own FSM solutions.



They are looking for providers such as FieldAware to help them take their field service management effort to the next level.

Key industry targets include building/construction (which includes Mechanical/HVAC, Electric and Plumbing), commercial equipment, facilities management, oil and gas, manufacturing, industrial equipment, and medical equipment. Competitively, there is a degree of overlap in targeted industry verticals.

### **A Strengthening Brand**

FieldAware has over 500 customers with field resources deployed in over 100+ countries, strengthening awareness of its brand and building an impressive set of referral customers. Field service organizations have a positive view of FieldAware, as evidenced by its positioning as a Top 10 FSM brand in recent Frost & Sullivan research. In this same research study, Competitor #1 is ranked slightly higher than FieldAware, while Competitor #2 is ranked slightly lower.

### **Leveraging Partnerships and Marketing to Generate a Positive Customer Acquisition Trend**

FieldAware has embarked on a number of paths to support the efficient and consistent acquisition of new customers, as well as enhance retention of its current customers. As discussed earlier, the company has broadened its acquisition efforts by forging co-sell/referral relationships with a top-tier set of technology and integration partners.

FieldAware is also implementing an impressive Account-Based Marketing (ABM) strategy that deploys highly targeted digital campaigns to generate new sales opportunities. Targeted ads and social media spends can leverage content that is based on the needs of carefully defined segments and sub-segments within a specific vertical industry. The intended audience can even be refined down to an individual prospect or customer account ("a market of one"). This level of marketing sophistication is still rare in the FSM sector.

### *Conclusion*

Today's field service customers expect timely, high-quality support and field service organizations are looking to mobile FSM solutions to help satisfy that demand. In this growing and highly competitive market, FieldAware's focus on optimizing customer value is reflected in multiple ways. These include recognizing the importance of the TCO metric, creating true mobile-first solutions, and offering a top-tier set of core capabilities and a menu of add-on modules that display keen insight into evolving customer requirements. In addition, FieldAware's selection of technology partners, its Customer Success team, and its marketing expertise reflect an impressive understanding of FSM customer needs.

With its strong overall performance, FieldAware has earned Frost & Sullivan's 2020 Customer Value Leadership Award.

## Significance of Customer Value Leadership

Ultimately, growth in any organization depends on customers purchasing from a company and then making the decision to return time and again. Satisfying customers is the cornerstone of any successful growth strategy. To achieve this, an organization must be best in class in 3 key areas: understanding demand, nurturing the brand, and differentiating from the competition.



## Understanding Customer Value Leadership

Customer Value Leadership is defined and measured by 2 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 performance. This dual satisfaction translates into repeat purchases and a lifetime of customer value.

## Key Benchmarking Criteria

For the Customer Value Leadership Award, Frost & Sullivan analysts independently evaluated 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

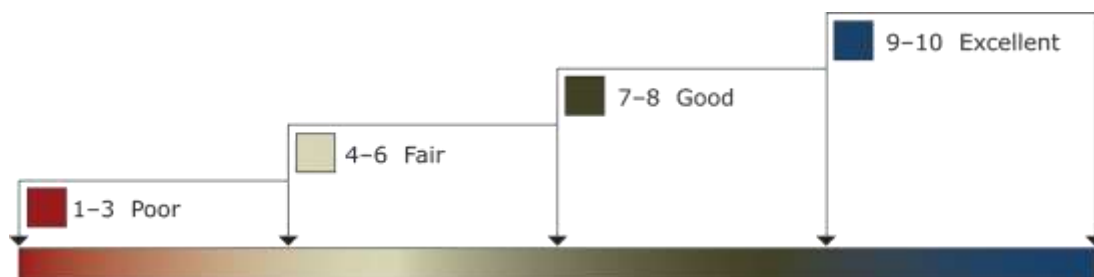
- Criterion 1: Financial Performance
- Criterion 2: Customer Acquisition
- Criterion 3: Operational Efficiency
- Criterion 4: Growth Potential
- Criterion 5: Human Capital

## Best Practices Award Analysis for FieldAware

### 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 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 considers Customer Impact and Business Impact (i.e., 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, Frost & Sullivan has chosen to refer to the other key participants as Competitor 1 and Competitor 2.

<i>Measurement of 1–10 (1 = poor; 10 = excellent)</i>			
<b>Customer Value Leadership</b>	Customer Impact	Business Impact	Average Rating
<b>FieldAware</b>	<b>10</b>	<b>9.6</b>	<b>9.8</b>
Competitor 1	8	8	8.0
Competitor 2	8	7.7	7.8

## *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 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 revenue, 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**

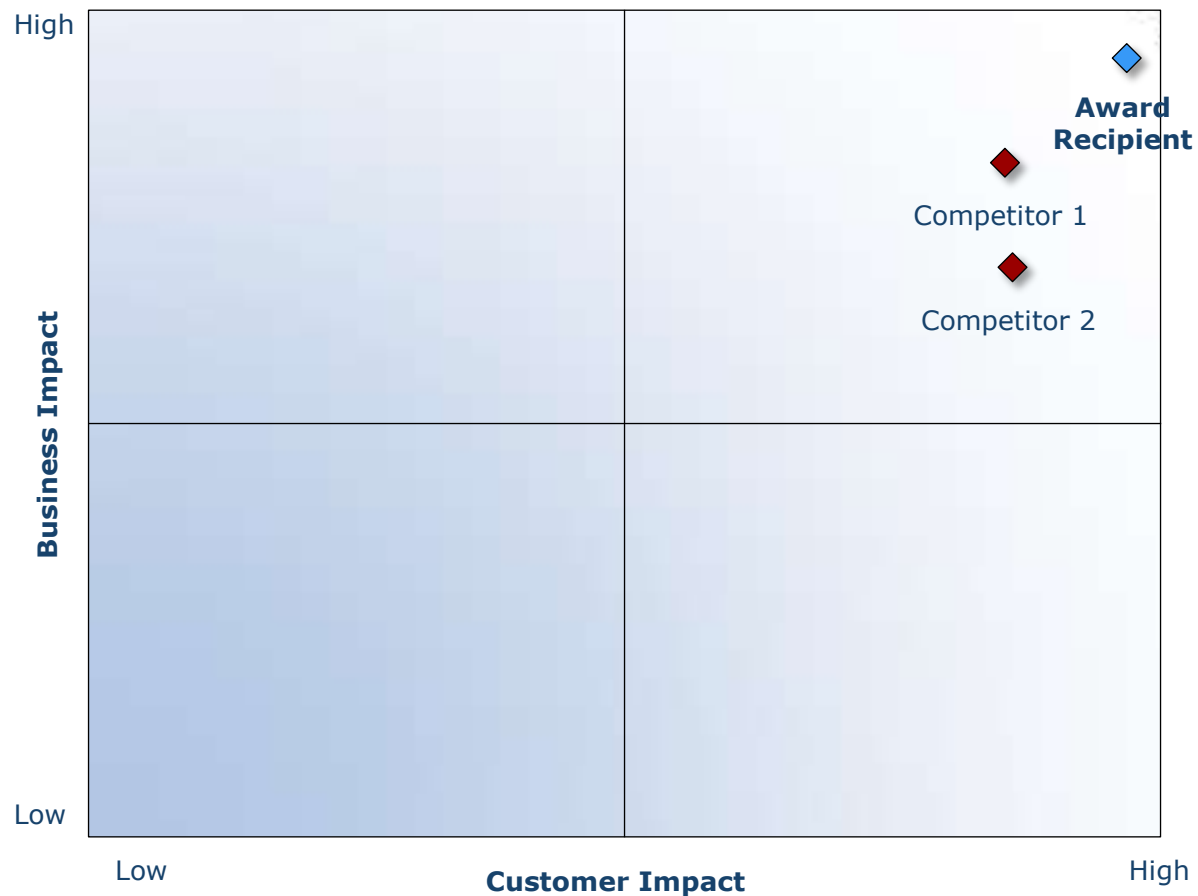
Requirements: Customer focus strengthens brand, reinforces customer loyalty, and enhances growth potential.

**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 practices criteria. The reputation and integrity of the awards are based on close adherence to this process.

STEP	OBJECTIVE	KEY ACTIVITIES	OUTPUT
1 <b>Monitor, target, and screen</b>	Identify award recipient candidates from around the world	<ul style="list-style-type: none"> <li>Conduct in-depth industry research</li> <li>Identify emerging industries</li> <li>Scan multiple regions</li> </ul>	Pipeline of candidates that potentially meet all best practices criteria
2 <b>Perform 360-degree research</b>	Perform comprehensive, 360-degree research on all candidates in the pipeline	<ul style="list-style-type: none"> <li>Interview thought leaders and industry practitioners</li> <li>Assess candidates' fit with best practices criteria</li> <li>Rank all candidates</li> </ul>	Matrix positioning of all candidates' performance relative to one another
3 <b>Invite thought leadership in best practices</b>	Perform in-depth examination of all candidates	<ul style="list-style-type: none"> <li>Confirm best practices criteria</li> <li>Examine eligibility of all candidates</li> <li>Identify any information gaps</li> </ul>	Detailed profiles of all ranked candidates
4 <b>Initiate research director review</b>	Conduct an unbiased evaluation of all candidate profiles	<ul style="list-style-type: none"> <li>Brainstorm ranking options</li> <li>Invite multiple perspectives on candidates' performance</li> <li>Update candidate profiles</li> </ul>	Final prioritization of all eligible candidates and companion best practices positioning paper
5 <b>Assemble panel of industry experts</b>	Present findings to an expert panel of industry thought leaders	<ul style="list-style-type: none"> <li>Share findings</li> <li>Strengthen cases for candidate eligibility</li> <li>Prioritize candidates</li> </ul>	Refined list of prioritized award candidates
6 <b>Conduct global industry review</b>	Build consensus on award candidates' eligibility	<ul style="list-style-type: none"> <li>Hold global team meeting to review all candidates</li> <li>Pressure-test fit with criteria</li> <li>Confirm inclusion of all eligible candidates</li> </ul>	Final list of eligible award candidates, representing success stories worldwide
7 <b>Perform quality check</b>	Develop official award consideration materials	<ul style="list-style-type: none"> <li>Perform final performance benchmarking activities</li> <li>Write nominations</li> <li>Perform quality review</li> </ul>	High-quality, accurate, and creative presentation of nominees' successes
8 <b>Reconnect with panel of industry experts</b>	Finalize the selection of the best practices award recipient	<ul style="list-style-type: none"> <li>Review analysis with panel</li> <li>Build consensus</li> <li>Select recipient</li> </ul>	Decision on which company performs best against all best practices criteria
9 <b>Communicate recognition</b>	Inform award recipient of award recognition	<ul style="list-style-type: none"> <li>Announce award to the CEO</li> <li>Inspire the organization for continued success</li> <li>Celebrate the recipient's performance</li> </ul>	Announcement of award and plan for how recipient can use the award to enhance the brand
10 <b>Take strategic action</b>	Upon licensing, company is able to share award news with stakeholders and customers	<ul style="list-style-type: none"> <li>Coordinate media outreach</li> <li>Design a marketing plan</li> <li>Assess award's role in strategic planning</li> </ul>	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 the 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, resulting in 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, helps clients 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 practices models to drive the generation, evaluation, and implementation of powerful growth strategies. Frost & Sullivan leverages nearly 60 years of experience in partnering with Global 1000 companies, emerging businesses, and the investment community from 45 offices on 6 continents. To join Frost & Sullivan's Growth Partnership, visit <http://www.frost.com>.