

# FIELD SERVICE EUROPE

## The 2014 European Services & Trends Report



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# Introduction

## The 2014 European Services & Trends Report

Competing on price alone is no longer viable for service organisations. In the developed world, the cost of manufacturing, increased competition and ease of production in low-cost economies (like Brazil, Russia, India and China) has forced companies to realise that they need a differentiator other than price to compete in the space. Servitisation has emerged as a best practice in the manufacturing industry, where manufacturers have begun to provide services along with their products.

Customers have driven the movement towards a “customer-centric” model, which industry leaders have readily adopted as their own. Organisations are now charged with creating less complex environments for customers in order to deliver on all the customers’ needs and offer a true end-to-end services solution. The overarching challenge for companies is finding a true understanding of customer requirements.

### Transformation of Services

The role of the service organisation has transformed across multiple industries. No longer is service just about delivering support; it’s about finding a true understanding of customer needs and the provision of solutions to ensure customer satisfaction, profitability and maximum value. Companies are now responding to increasing customer demands: customers want reliability, availability and performance when it comes to their product. The challenge for service organisations is how to deliver on that at a fixed price.

Culture plays a huge part in how service companies set themselves up to deliver service. The broad assumption that the model used in mature markets will work in emerging markets is unfounded, and more often than not, wrong. Savvy executives have realised the need to talk to partners in those countries, talk to customers in those countries, in order to understand what constitutes the best possible **value** for their customers. From those conversations, companies will be able to decide what type of infrastructure to set up to deliver service.

**These industry experts gave feedback to the survey's results. You'll find their opinions and analysis throughout.**



David Hart  
VP of Global  
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Transformation  
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Solutions Europe  
**bioMérieux**

What works for a mature market's culture, more often than not, will not work in another market. Political upheavals in Egypt, natural disasters as observed in Thailand in 2011, the Philippines in 2013 and domestic economic issues in Brazil and India, are just a few of the many supply chain risks that must be considered. There is no "one size fits all" solution when it comes to service and companies need to tailor their value propositions accordingly.

## Service Challenges in EMEA

The European market, coupled with the challenges already inherent in the field services space, has had a long, arduous history of disadvantageous labour costs. Barriers to trade, anti-competition legislation and vexing regulatory issues are just some of the many problems cross-industry service providers are charged with in order to conduct business day after day. Delays, uncertainty and litigation before the European Court of Justice, all further complicate an already convoluted commercial playing field in the Pan-European space.

It was with all of this in mind that field service organisations came together to redefine their value propositions in the European marketplace at the **Field Service Europe Conference**, held in Amsterdam in October, 2013. Fusing academic theory with reality, Field Service Europe attempted to answer some of the many questions plaguing the industry. Best in class companies have recognised the need to be more competitive in the global economy, the need to look at processes through the lens of the customer, and continually evolve and improve their operations.

The team behind **Worldwide Business Research's Field Service Europe conference** – with help from an advisory board of senior-level executives from international service organisations, and partner, **ServiceMax** – created a benchmarking questionnaire for Field Service Europe's 2013 audience of service and support executives. The survey was distributed at the Amsterdam conference, where more than 110 executives from cross-industry, cross-vertical service and manufacturing companies answered questions about mobility, workforce management strategies and best-in-class strategies for training and development. Their roles ranged from **Senior Vice President**, to **Global Service Leader**, to **President** and **CEO of the Supply Chain** and more. They represented companies as diverse as **Dell, Bayer Healthcare and Johnson Controls**. This report details the results of the survey.

# Evaluating the Value Proposition of Servitisation



## **Servitisation is now embedded in the foundation of nearly every successful business proposition across the globe.**

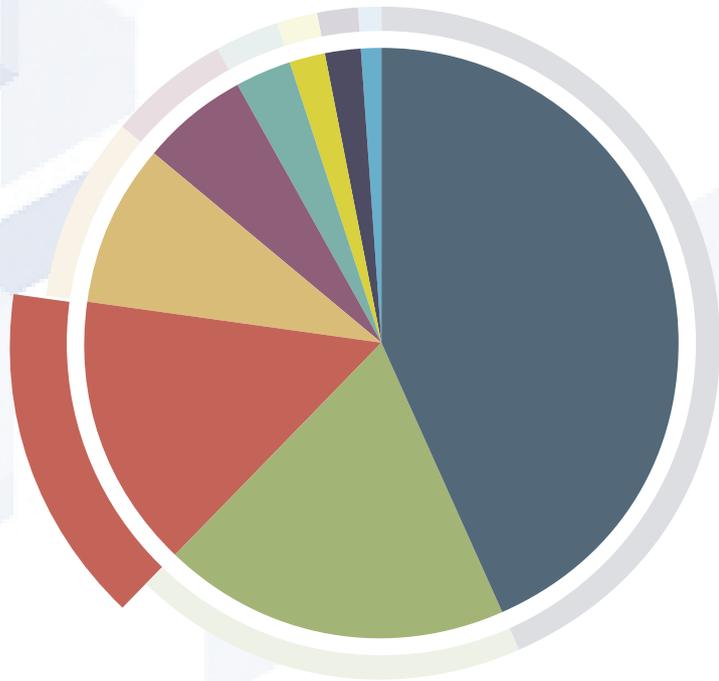
Rolls Royce Aerospace, for example, does not just sell aero-engines to its customers. Instead, the company has tapped into a new revenue stream from a service offering called "total care packages." Through this "total care package," its customers now pay per use on the engine they buy. The airline is assured that there will be a fixed cost to running the aircraft when the engine turns and promised that there will be no surprises for sudden maintenance costs or repair costs outside of the warranty period. The value proposition for customers, essentially, is that they are able pay for peace of mind.

**Xerox**, similarly, has moved from existing purely as a manufacturer to branding itself as a "technology driven service company." Instead of merely selling printers and copiers, the company now offers its customers a service proposition called "total document management." Customers have their document requirements managed by Xerox, which manages the whole process for the company. And the list goes on.



# Question 1:

What is the primary product that you service?



# 15%

of service organisations at Field Service Europe primarily service construction/industrial products.

\*Other if listed: Machinery, Process Control Systems, Industrial Printing and Networking, Aerospace Defense Transport

- 44% Imaging, Medical, Scientific
- 19% Other
- 15% Construction/Industrial products
- 9% Commercial appliances and Electronics
- 5% Transportation
- 3% Enterprise network support services (Electrical, Security, Telecom, Cable, Internet)
- 2% Commercial Computers
- 2% Utilities
- 1% Domestic appliances and Electronics
- 0% Domestic Computers



## Point To Note:

- There were 14% fewer service construction companies at this event than at WBR's Field Service (FS) USA conference in April, 2013.

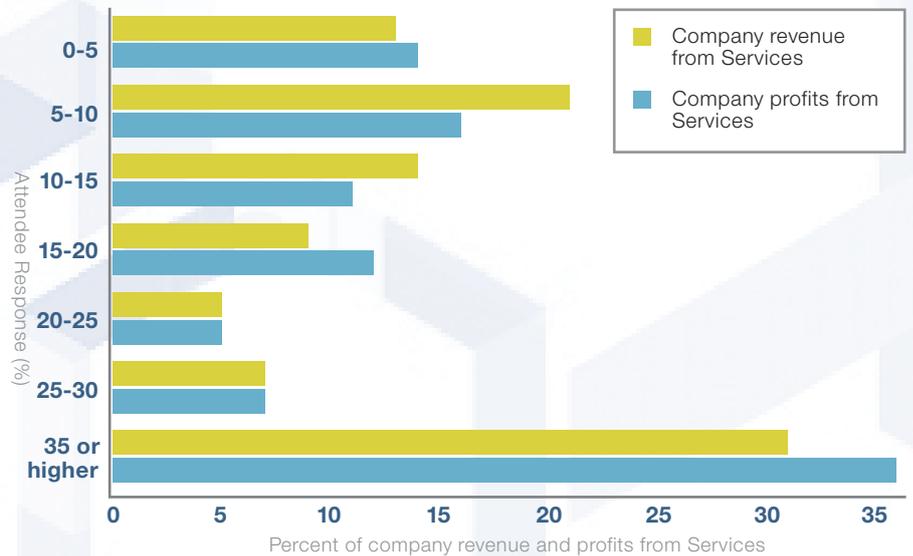
## Question 2 and 3: What percent of company revenue and profits comes from Services?

# 31%

of respondents said that 35% or more of their company's revenues come from services.

# 36%

of respondents said that their companies earn 35% or higher in profits from services



■ 13% 0-5%	■ 14% 0-5%
■ 21% 5-10%	■ 16% 5-10%
■ 14% 10-15%	■ 11% 10-15%
■ 9% 15-20%	■ 12% 15-20%
■ 5% 20-25%	■ 5% 20-25%
■ 7% 25-30%	■ 6% 25-30%
■ 31% 35%	■ 36% 35%

### Points To Note:

- 31% of respondents said that 35% or more of their company's revenues come from services, as opposed to 23% reported by respondents at FS USA. Similarly, 36% of respondents said that their companies earn 35% or higher in profits from services, as opposed to the 26% reported by Field Service USA attendees. The data suggests that companies in Europe are having more success generating profits and revenues from their service proposition and perhaps they could teach their counterparts in the US a thing or two.
- The findings suggest that companies' services are key factors influencing the company's bottom line. The "**smart companies**," industry executives agree, are the ones that focus on **customer satisfaction** and **loyalty** and then realise that revenue and profit is a result of that.
- The key to getting it right, as a service organisation, is to continually evaluate the value proposition and understand how to deliver on the customers' evolving needs.



## Question 2 and 3: Attendee Feedback



"I was initially surprised that 31% of respondents said that 35% or more revenues come from services. But two thoughts hit me: First, your respondents come from large companies, 59% have 2k+ employees. Second, it is easier to be so high when your new (non-service) businesses are growing. Given the state of the economy, company sizes and maturity, I talked myself out of being surprised."

- Ron Zielinski, Global Customer Service Leader, Coherent

"Thirty one percent [for revenues] is really encouraging. This shows the value that more and more companies are placing on service and service performance."

- Christopher Lynch, VP of Global Service, Kinetic Concepts, Inc.



"Thirty-five percent of revenues is high in comparison to most capital equipment companies, but the best performers here are reaching the 50+ percent mark. For companies like Rolls-Royce Aerospace, BAE Systems and Xerox, higher profits of 35 percent from services is not unexpected."

- Dr. Howard Lightfoot, Research Fellow, Aston Business School

"For me this information bears testament to the fact that whilst top line revenue growth has been challenging from a sales perspective during the deep recession we have been faced with, CEO's are realising the hidden gems within their organisations. Service is that hidden gem and is only recently being recognised as a major growth engine for companies."

- David Hart, VP of Global Customer Transformation, ServiceMax



## Question 4:

Does your service organisation act as a cost centre or a profit centre?

“

It's encouraging that two-thirds [of the companies] view service as a profit centre. This shows that industry is migrating from the old cost centre methodology.

- Christopher Lynch, VP of Global Service, Kinetic Concepts, Inc.

”

66%

**of attendees view their service organisations as profit centres rather than cost centres.**



34%

**of attendees view their service organisations as cost centres.**



### Points To Note:

- A profit centre, by definition, is a services centre that views driving efficiencies and savings as key objectives. A profit centre approach for an organisation is one that would be more flexible in providing incentives for staff to exceed performance expectations.
- It is no wonder that nearly half of the attendees have a strategy in place to incentivise field techs (as explained in question 8).

# 66%

of attendees attributed less than 5% of their van stock as a portion of revenue.

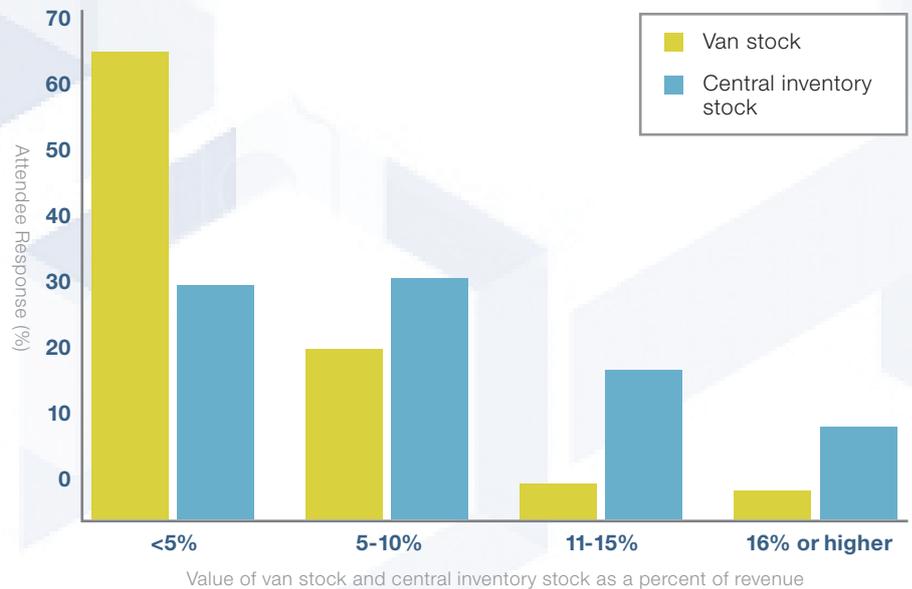
# 33%

of the companies surveyed viewed central inventory stock as less than five percent of revenue.



## Question 5 and 6:

### What value of van stock and central inventory stock do you have as a percent of revenue?



#### Van Stock

- 66% <5%
- 29% 5-10%
- 5% 11-15%
- 4% 16%

#### Central Inventory Stock

- 33% <5%
- 34% 5-10%
- 21% 11-15%
- 12% 16%

### Points To Note:

- This suggests that field technicians have a real-time view of current inventory levels as well as parts availability. They can post parts used against the work order, request parts if they are not in van stock, track their van stock, receive inventory and ship parts back to the warehouse or depot for closed loop tracking of returns and vendor claims. **Essentially, "having the right part for the right job at the right time," is viewed as an industry standard, not just a "nice to have."**
- This suggests that in field service, cost is almost always paramount. Companies seldom view central inventory stock in terms of the amount of money generated.

# 43%

of the companies surveyed reported diversifying their business as a growth strategy that is working today, coming in above servicing competitive products, (36%) and consumable sales (24%).

“

I'm surprised that there were so many responses focused on servicing competitive products. This is challenging in the medical field. It's not unattainable, but definitely challenging.

- Christopher Lynch, VP of Global Service, Kinetic Concepts, Inc.

”



## Question 7:

What growth strategies are working for you today? (Check all that apply)\*



Results are not meant to equal 100%

- 43% Diversifying business
- 36% Servicing Competitive Products
- 24% Consumable sales
- 19% None of these

### Point To Note:

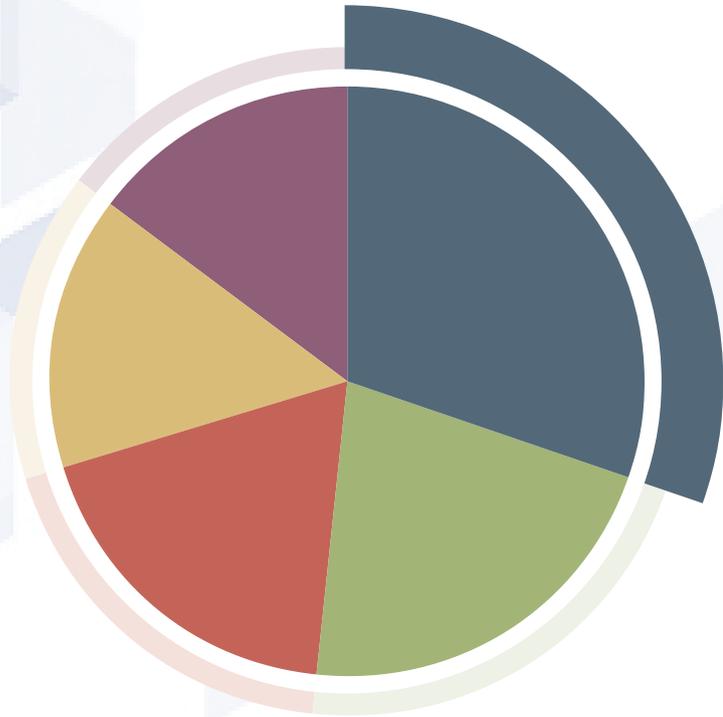
- Nearly half of the companies surveyed (43%) see diversifying their business as an effective growth strategy; clearly the role of the service organisation has transformed. No longer is service just about delivering support, it's about finding a true understanding of customer needs and the provision of solutions to ensure customer satisfaction, profitability and maximum value. As such, it is no surprise that companies looking to increase their bottom line are diversifying the services they offer, such as servicing competitive products and looking into consumable sales. Diversifying can mean opening up cross-sell and upsell opportunities through service techs, delivering a high margin business opportunity. Maintaining competitor equipment can deliver revenue gains, but margins can be impacted as often price is the only differentiator – long term, that can hurt everyone's P&L.

## Question 8:

Do you have processes in place to incentivise your field service reps to: (Check all that apply)\*

# 44%

of the executives surveyed view their field technicians as qualified lead generators



Results are not meant to equal 100%

- 44% Provide Qualified Leads
- 31% Directly Sell Parts
- 27% Other
- 22% Consumable Sales
- 21% Upgrade Contracts



### Points To Note:

- When asked whether there was a strategy in place to incentivise field service technicians as revenue generators, 44% viewed their technicians as qualified lead generators, while only 31% said they incentivise techs to directly sell parts/services. Only 21% reported to have a formal strategy in place to incentivise reps to upgrade contracts, and 22% said that they have a strategy in place to sell consumable goods. **This was a significant decrease from the findings of the FS USA 2013/2014 Benchmarking Report**, where 56% reported to have a strategy in place to provide qualified leads and 47% reported to incentivise reps to directly sell services.
- The findings show that nearly half of the companies surveyed view their field technicians as qualified lead generators, but not as sales people. This suggests that cross-industry cross-function leaders see their field service agents as powerful drivers for profitability, but the technicians' role in driving profit falls when faced with enabling customers to identify other issues they may have during the service call, and then converting that sale.

# The role of the field service technician is invaluable.



**The technicians not only form relationships with the customer, they evaluate the needs of the customer to improve upon their own value offerings.** Faced with more restrictive funding and increased competition, the strategy for field service organisations should be to build on strengths. Field technicians are well equipped to service instruments and manage spare parts; leverage your field technicians' product knowledge with a value proposition of after sales support to benefit the customers.



"Given the autonomous nature of technician jobs, I would think that getting good results would require a great deal more management and/or systemic oversight, absent some sort of incentives. However, I don't know the applicable labour regulations in the respondents' respective markets, so the sorts of incentive plans that we're able to use may not be practical in their markets."

- Dave Baker, Senior Vice President of Field Services, DIRECTV

"Service techs are 'trusted advisors' and are a very powerful tool in driving additional value both to the customer and the organisation they represent. Whilst it's encouraging that companies are looking at utilising their trusted advisors, this is somewhat countered by Q9 where organisations are saying that 74% have no strategic timeframes to incentivise techs within two+ years. I think there is a huge opportunity here for companies."

- David Hart, VP of Global Customer Transformation, ServiceMax

## Question 9:

If no process is in place to incentivise reps—do you have strategic time frames to do so?

“

[We] need to have better correlation with incentivising service reps. The findings show that 40% have no plans to incentivise, yet the rest of the data shows the high revenue/profitability of the area. This appears to be some mis-alignment here in rewarding the right people. We need to address that as an industry.

- Christopher Lynch, VP of Global Service, Kinetic Concepts, Inc.

”



### Point To Note:

- At FS USA in 2013, 100% of the companies reported either having a strategy in place to motivate reps to either directly sell services, provide qualified leads or were looking to put those strategies in place in the near future. The majority of companies at FS USA, over 56%, had a strategy in place to motivate field service representatives to provide qualified leads, and nearly half of surveyed companies, 47%, had a strategy in place to incentivise reps to directly sell services.
- The disparity between the European and the US markets is not surprising. When examining the state of the Pan-European marketplace, technicians are continually charged with improving efficiencies of their supply chains. Expectations around service execution, for example, are noticeably different across regions, and the vexing issues tied with EU regulations applying to products sold to consumers and to industrial purchasers, can throw another wrench in an already over-crowded tool belt. When conducting a cross-benefit analysis of lead generation in the EU, as well as other “emerging markets,” the opportunities for lead generation may not outweigh the costs.



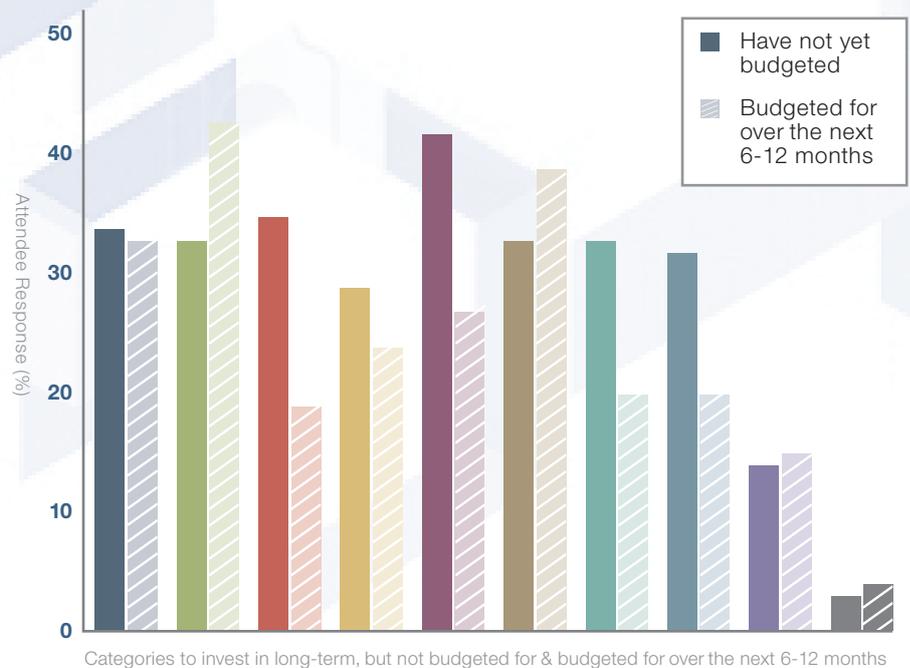
Without doubt mobility will give companies access to benefits they know are there, but technology has been an inhibitor for them to reach those opportunities in the past. Mobility alone is not an enabler to increased revenues, higher efficiencies and the ability to delight the customer. It needs to be married with a system that can allow those benefits to be exploited.

- David Hart, VP of Global Customer Transformation, ServiceMax



## Question 10 and 11:

Which of the following do you plan to invest in long-term, but have not yet budgeted for, and which of the following have you budgeted for over the next 6-12 months?



Results are not meant to equal 100%

### Have not yet budgeted

- 42% Remote Diagnostics
- 35% PC/Laptop
- 34% Smartphone
- 33% Tablet
- 33% Call Centre Technologies
- 33% Scheduling
- 32% Parts Management
- 29% CRM
- 14% Social
- 3% Other

### Budgeted for over the next 6-12 months

- 43% Tablet
- 39% Call Centre Technologies
- 33% Smartphone
- 27% Remote Diagnostics
- 24% CRM
- 20% Scheduling
- 20% Parts Management
- 19% PC/Laptop
- 15% Social
- 4% Other

### Points To Note:

- When evaluating budgeting for deployment over the next year, 43% of attendees ranked tablets as the number one area in which they are allocating their budget. Thirty nine percent of companies have budgeted for call centre technologies and 33% have budgeted for smartphone capabilities for their field technicians. These findings suggest that the increased need for mobility and quick turnaround is the number one priority for companies in field service, second only to the need to increase customer satisfaction.

## Question 12:

In your business, where are the biggest opportunities for cost savings?  
(Choose only one)

# 29%

When asked where the biggest opportunities lie in terms of reducing cost, 29% of companies said that they could reduce costs in regards to new technology.

\*Other if listed:  
Organisation, Productivity  
and Efficiency, Processes



■ 29% Technology

■ 25% People

■ 24% Transport

■ 12% Training

■ 5% Cloud

■ 5% Other (please list)\*



### Point To Note:

- Twenty-nine percent of companies viewed technology as an opportunity to reduce costs. These findings are interesting, since 41% also cited technology as one of the biggest areas for revenue growth. This suggests that what executives want in theory does not align with what they are doing in practice.

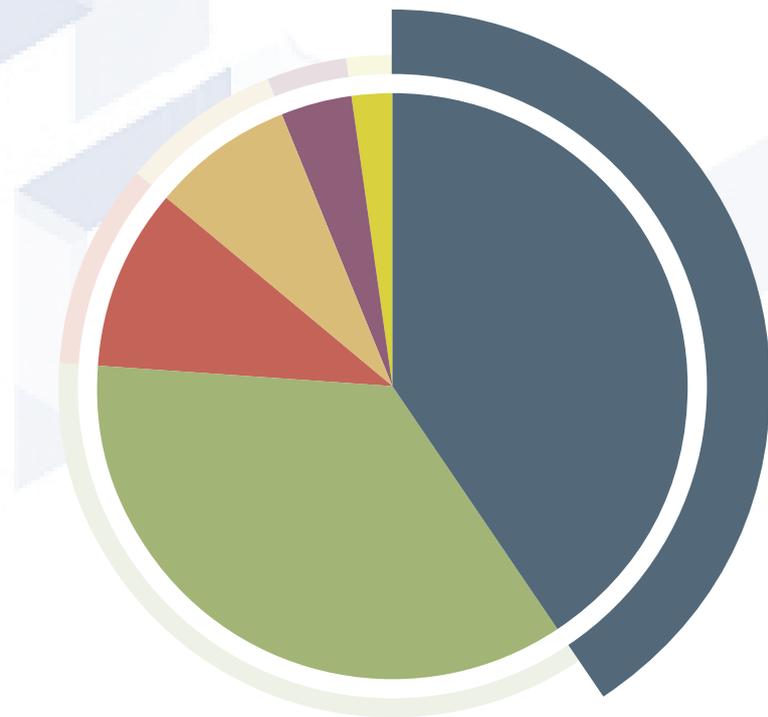
# Question 13:

In your business, where are the biggest opportunities for revenue growth?  
(Choose only one)

# 41%

of respondents said that their biggest opportunity for revenue growth lies with the deployment of new technology, coming ahead of their people, at 36%, and training, at 10%.

\*Other if listed: Service Portfolio Expansion, Service Contracts, New Segments, Consulting, Process Support



■ 41% Technology	■ 7% Other
■ 36% People	■ 4% Cloud
■ 10% Training	■ 2% Transport



## Point To Note:

- The push for deployment of new technology is a major concern for companies in the industry. Similarly, the desire to enable technicians as revenue generators is a global concern for service organisations. In the FS USA 2013/2014 Benchmarking Report, 73% of US respondents ranked soft skills as an area of training they're currently prioritising in their field forces, second only to product and repair training. It is interesting that 41% cited technology as one of the biggest areas for revenue growth, since 29% of attendees saw technology as an opportunity for cost savings.

## Question 12 and 13: Attendee Feedback



"Question 12 and 13 indicate the dilemma service leaders face. When driving headcount efficiencies in their respective businesses, do they use the capacity gained in diversifying their service offering and break into new areas? Perhaps invest training in soft skills to drive additional cross-sell and upsell opportunities? Sadly, many are using efficiencies to drive headcount reductions that offer short-term bottom line benefits, perhaps to the detriment of long-term revenue gains."

- David Hart, VP of Global Customer Transformation, ServiceMax

"If your respondents are referring to ICT costs, then I would have expected this to be the majority. Investment in staff training is a must in the service end of the business in particular."

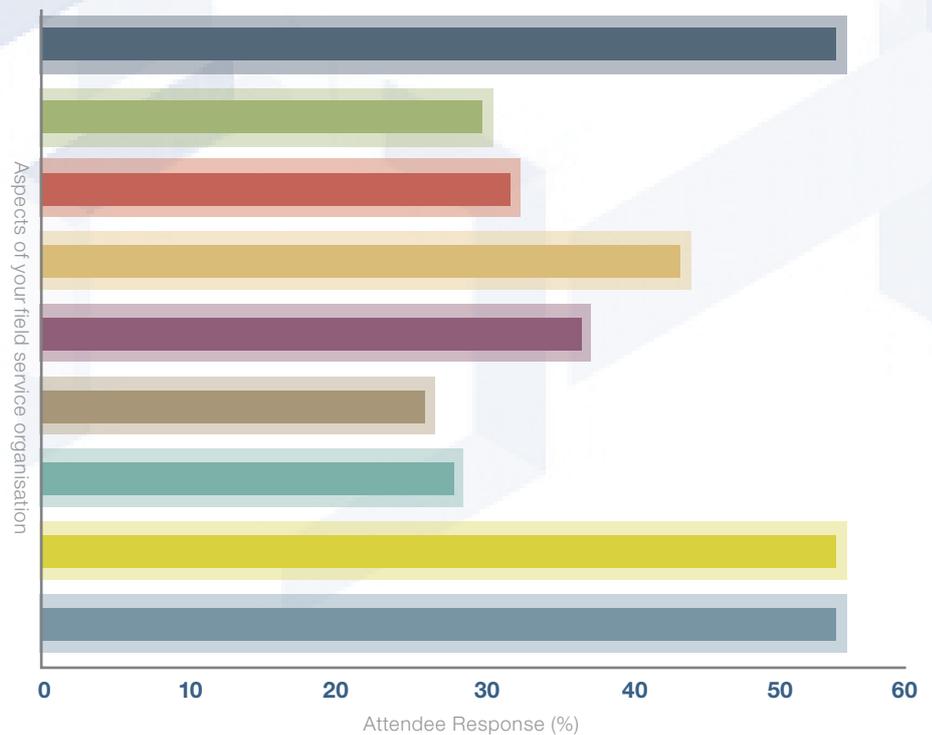
- Dr. Howard Lightfoot, Research Fellow,  
Aston Business School

# 56%

When asked what areas could benefit from technology and automation, an equal amount of respondents (56%) choose scheduling & dispatch, reporting and iPad iPhone & gps capabilities.

## Question 14:

What aspects of your field service organisation could benefit from the application of technology/automation?  
(Check all that apply)



Results are not meant to equal 100%

- 56% Scheduling & Dispatch
- 56% Reporting
- 56% iPad, iPhone & GPS Capabilities
- 45% Social Collaboration
- 38% Route Optimisation
- 33% Mobile & Offline
- 31% Inventory & Parts Logistics
- 29% Warranty Management
- 27% Signature Capture



### Point To Note:

- Organisations across the board recognise the need to invest in the right technologies and tools to enable employees to improve existing processes, meet the growing needs of customers, and make greater contributions to the bottom line. Forward-thinking companies in field service have already implemented strategies to improve existing service operations, manage resources, their partners and most importantly, their customers.

## Question 14: Attendee Feedback



"I was surprised that 56% stated that iPad, iPhone & GPS would benefit from technology/automation. The surprise is that it is Apple products in a business environment. I truly believe Microsoft's tablets will be key here because they interface seamlessly with standard Microsoft Office programs. (I own both tablets and can say the Surface makes it easy in the work environment). Apple has the shiny gleam about it, though doesn't it!"

- Ron Zielinski, Global Customer Service Leader, Coherent



## Question 15 and 16:

Do you have metrics in place at your organisation to measure customer satisfaction and customer loyalty with your field service operations?

Best-in-class customer service organisations are better able to analyse their Net Promoter Score (NPS) when such metrics are in place. Through these, service organisations are not only able to predict but prevent customer attrition by interpreting and acting on the voice of the customer, which ultimately helps the bottom line. By using these strategies, the company is better positioned for accelerated growth during improved economic times. That means customer service operations must provide accessibility and transparency for customers in an environment that is highly productive and growth friendly, but also cost manageable.

82%

of respondents said that there are metrics in place to measure customer satisfaction



60%

of companies have metrics in place to measure customer loyalty with their field service operations.



### Point To Note:

- Customers now expect to request and receive help via multiple channels including phone, email, instant message and mobile. They want to be able to ask questions, be fully informed on status, and achieve a resolution, 24/7, and on any device. Some of the greatest and most enduring assets are the relationships formed with loyal customers. The ability to understand customer needs and tailor programs throughout the customer lifecycle fosters strategic relationships.

# What's the true value of customer loyalty?

"I believe that every customer has a basic expectation that the technician who responds to a trouble call will have the requisite training and competencies to make repairs as quickly and efficiently as possible. But today's customers are more savvy in many ways, and field staff are now required to engage the client on a variety of customer care topics including; company initiatives, product updates, product training and complaint resolution. To be successful, it is necessary that the field staff understand how to deal effectively with customers so that their experience is a positive one."

- Ken Walsh, Chief Engineer & Vice President Operations, London Hydro Inc.



**The heightened focus on customer satisfaction is not isolated to the European markets.** In North America, for example, many companies in the industry have moved toward a more customer-centric point of view. Savvy company executives know that some of their greatest and most enduring assets are the relationships they form with their customers.



# The field service technician has to evolve with the evolving customer.



"Customer satisfaction measurement is common in most industries, so 80 percent is no surprise. On the basis that it is generally accepted that it is five times harder to get a new customer than keep an existing, then 60 percent to me is a low figure – more likely I would expect 80+ percent."

- Dr. Howard Lightfoot, Research Fellow, Aston Business School

**He has to build relationships that help him interface with the customer and he has to provide feedback into the design process or the service network on what the customer's real perception is of the product and how it's working. He needs to be technically competent to understand the products, but also needs to have the soft-skills to set up good communication processes.**



## Question 17 and 18:

Do you get a comprehensive list of management reports that allow you to manage business operationally and to manage business fiscally?

73%

of respondents get comprehensive management reports to measure their business operationally.

78%

said that they receive comprehensive reports that allow them to effectively manage their companies' finances.

“

I would have thought this was a must for any organisation.

- Dr. Howard Lightfoot,  
Research Fellow, Aston  
Business School

”



### Point To Note:

- Question 17 shows that 73% of respondents get comprehensive management reports to measure their business operationally, while 56% of respondents said their reporting practices could benefit from technology/automation (q14). This raises the question about whether executives are satisfied with the reporting they have in place. This could indicate that whilst reporting exists in their organisations, it may not have the technologies required to allow the level of granularity required for a service leader. Better technologies would give leaders the ability to drill down should additional information be required and would result in better service lifecycle management.
- In today's competitive market, field service executives know that optimising their field service resources is the key to not only reducing overhead, but also is the best way to continually improve service value, delivery and to generate new revenue. Companies are continually deploying new field service automation software initiatives in order to accomplish these strategic goals.

# Question 19:

Can your current system measure profitability at a: (Check all that apply)

# 80%

of companies surveyed cited the ability to measure profitability at a national level, followed by 66% who measure at the regional level, and 33% whose system could measure at the technician level.



Results are not meant to equal 100%

■ 33% Technician level   ■ 66% Regional level   ■ 80% National level



## Point To Note:

- These findings suggest that the majority of service organisations are still far off from measuring profitability effectively. Companies need to put the metrics in place to measure on all three levels comprehensively in order to find the inefficiencies within all levels of their organisations.



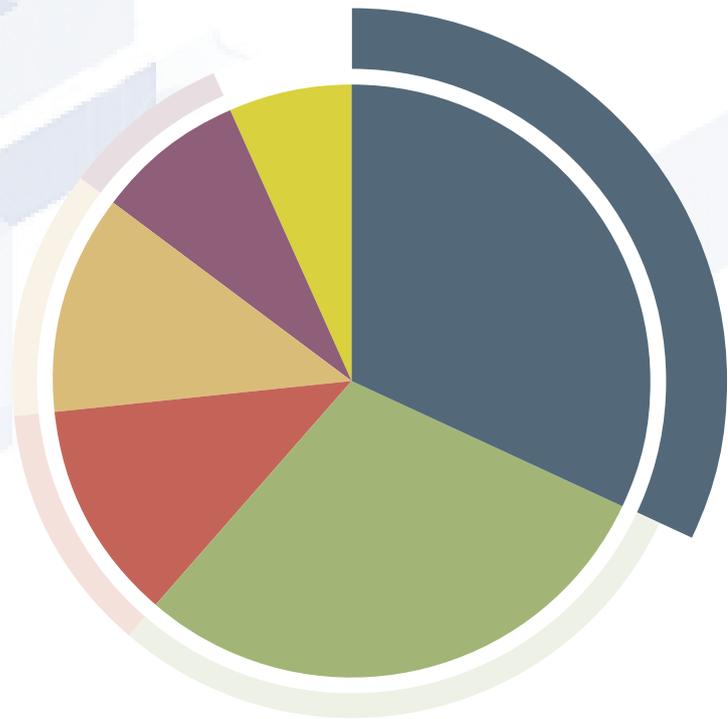
Preventive maintenance through qualified field engineering systems can be the key success factor to provide 'highest safety and quality standards,' in combination with delivering 'highest service standards.' An efficient field engineering system can lead with its tracking and planning functions to 'best value for money' in service and 'highest results in customer satisfaction.'

- Martin Lang, Director of Maintenance, Repair & Overhaul, Eurocopter UK Limited



## Question 20:

What percent of your incoming service requests are resolved through Remote Assistance? (Choose only one)



- |  |  |
|--|--|
| ■ <b>35%</b> 0-5 percent of their incoming service requests are resolved through Remote Assistance   | ■ <b>11%</b> 30-40 percent of their incoming service requests are resolved through Remote Assistance       |
| ■ <b>32%</b> 5-20 percent of their incoming service requests are resolved through Remote Assistance  | ■ <b>5%</b> 40-50 percent of their incoming service requests are resolved through Remote Assistance        |
| ■ <b>11%</b> 20-30 percent of their incoming service requests are resolved through Remote Assistance | ■ <b>6%</b> 50 percent or higher of their incoming service requests are resolved through Remote Assistance |

### Point To Note:

- This is a two-point increase from the FS USA 2013/2014 Benchmarking Report, where 64% of those surveyed said that less than 20% of service requests were resolved through remote assistance. This suggests that the push for increased remote capabilities within service organisations is a global effort, and is nearly the same across markets.

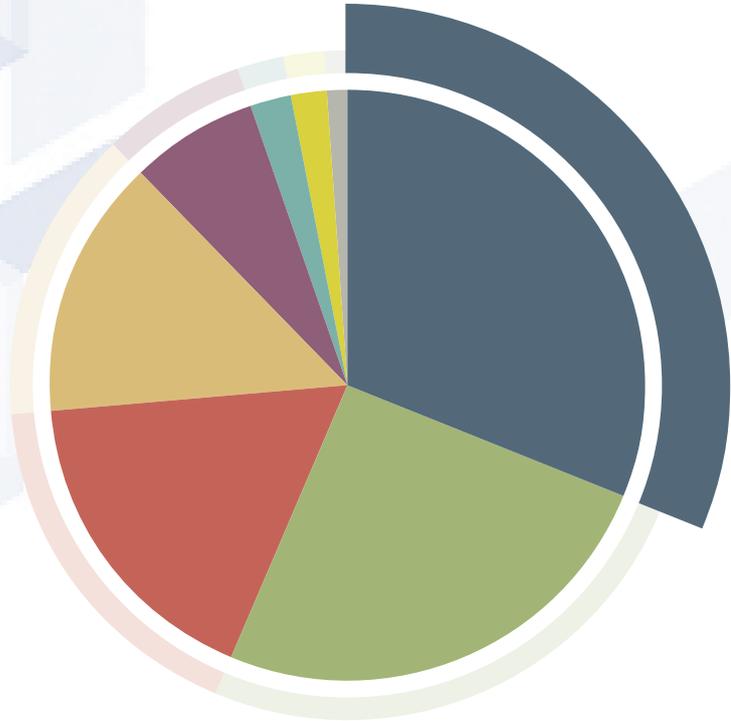
# Question 21:

## What variable pricing do you use for Transactional Service?

# 31%

of surveyed companies offer differentiated rates based on product lines.

\*Other if listed: Fixed Hourly Rate



- 31% Differentiated rates based on product lines
- 26% Package for parts and service
- 17% Differentiated rates based on response time
- 14% Differentiated rates based on service job size
- 7% Other (please list)
- 2% Differentiated rates based on first time fix
- 2% Defined approach to differentiate rates based on available capacity
- 1% Differentiated Rates through alternative sales channel



### Point To Note:

- This is two points fewer than the FS USA 2013/2014 Benchmarking Report, where 33 percent of respondents reported to offer differentiated rates based on product lines, which shows that both audiences are essentially equal on this front.

“

Independent from the market, a company is in, it all comes back to people, process and physical environment. If by these 'means' you can reduce cost, improve productivity or quality, and prefer all of them at the same time, you can easily show the value of your propositions for the customer. To do it effectively and cost-efficiently, we all have the same need (some of us have them already in place) for tools like; CRM, field service software, remote services, spare part logistics, etc.

- Fred Bayens, Business Manager Performance Solutions Europe, bioMérieux

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## Question 22:

Number of employees at your company?  
(Choose only one)



■ **29%** <500 employees at your company

■ **15%** 501-2,000 employees at your company

■ **22%** 2,001-5,000 employees at your company

■ **12%** 5,001-10,000 employees at your company

■ **22%** 10,000 employees or higher at your company

### Point To Note:

- Of the companies surveyed, 22% reported to have 10,000 employees or more at their organisations.

# Question 23:

Where does your company operate from?\*

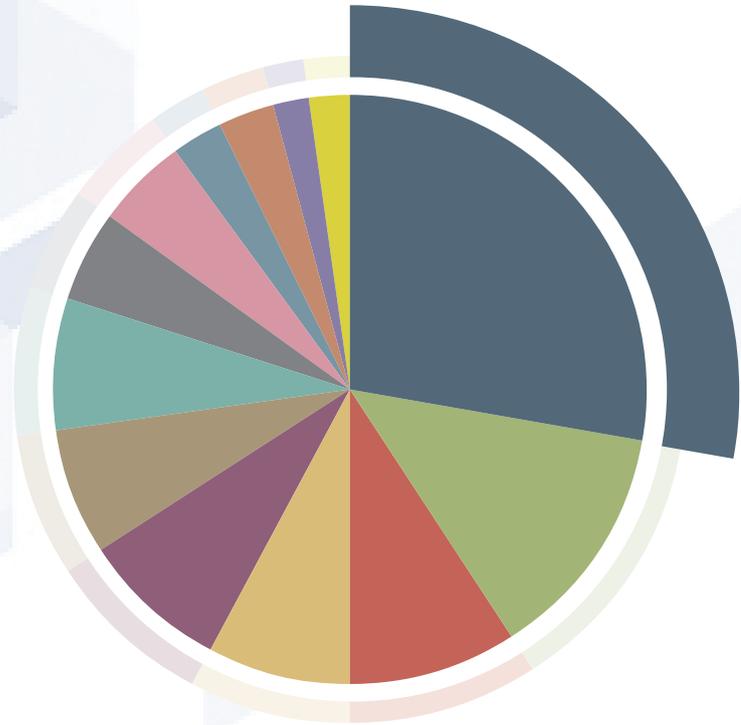
# 28%

of respondents operate on a global scale.



The Swiss presence is not surprising since the machine tool industries in this country have, for some time, had to offer services integrated with their product to defend against product from China and Japan.

- Dr. Howard Lightfoot,  
Research Fellow, Aston  
Business School



- 28% Global
- 13% Luxemborg
- 9% France
- 8% Netherlands
- 8% Other
- 7% Switzerland
- 7% US
- 5% Europe
- 5% UK
- 3% Germany
- 3% Italy
- 2% Belgium
- 2% Africa

## Point To Note:

- 28% of respondents operate on a global scale. At the regional level, 13% reported to operate in the European market while 8% operate within the US. The major countries present at Field Service Europe were France, (9%) the Netherlands, (8%), and Switzerland, (7%).
- \*These countries have all been mentioned by attendees, and were not options on the original survey
- \*Other countries include Turkey, Israel, Serbia, Australia, Denmark, Norway



Service and support is a business by itself. The Field Service Europe Conference showed us that many companies are fishing in the same pond where many different fish can be caught that become bigger and healthier every year. Happy fishing to you all.

- Fred Bayens, Regional Business Manager for Service in Europe, Biomerieux



## About Field Service



Field Service is the leading service and support event that attracts senior-level service and support professionals from 15 different manufacturing industries including Aerospace, Medical Device Manufacturing, Hi-Tech Electronic, Semi-Conductor and Capital Equipment, Construction, Automotive, Telecommunications Equipment, Energy, Industrial and Agricultural Equipment and more! Field Service tackles the latest strategies in core service functions including mobility, workforce management, technical support and knowledge management. Additionally be sure to gain as much insight to the new areas hounding service and support professionals all over the world including innovative developments in increasing service revenue, customer soft-skills, technician utilisation, developing service leadership and effective mobile resources management.

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ServiceMax is the perfect choice to manage field service operations. It is an extremely reliable application, even when dealing with thousands of daily transactions and complex business rules. In a few words: strongly recommended.

- Dejour Medeiros, Senior Analyst, Electrolux



# Field Service Blog

Free exclusive content, social networking and the best kept secrets to service, from leaders in the field service industry.

Hi everybody! Deanna Gillen here, Editor of the Field Service Blog, a source of exclusive content generated by and for the field service industry leaders. Have you visited it yet? Every week I'm writing about what's happening in the industry, how to educate ourselves about best practices and challenges, and how we can use this information as leverage for our own businesses in the competitive field service space.

The Field Service Blog features articles, weekly polls, interviews, how-to tips and Q&A's from the leaders of the field on the following topics: service revenue, mobility, integration, proactive/preventative services, and bridging the talent gap in your organisation, to name a few. Stop on over to the blog and watch out for our annual benchmarking report to see how you measure up to your peers. Procured and provided exclusively for our attendees.

Be sure to check out the blog at [fieldserviceblog.com](http://fieldserviceblog.com) for some of the best kept secrets in field service, delivered straight from the top.



## Media Contact

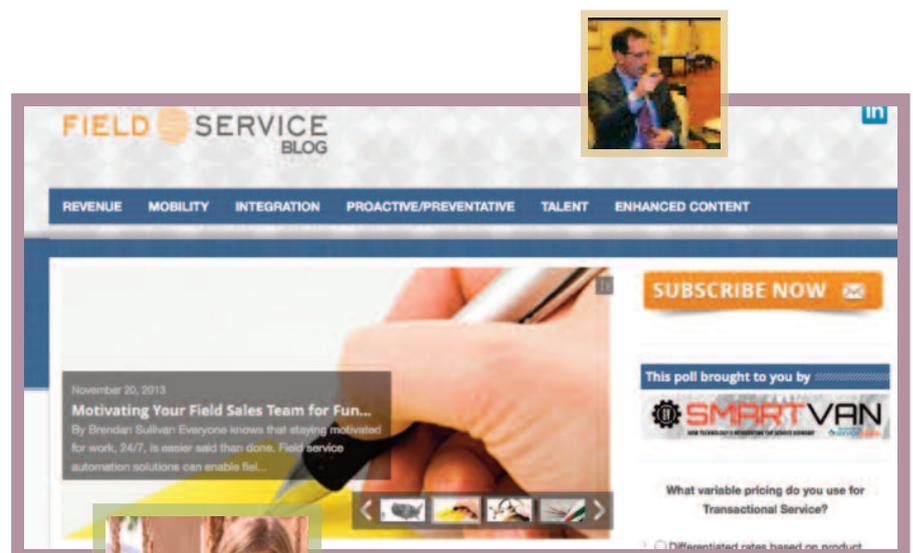
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## Interested in Contributing?

If you are a writer, blogger or a general service and support expert, we would be happy to hear from you and consider publishing your contributions. We are interested in topics like service revenue, mobility, integration, talent management and more. Please contact Deanna Gillen, Editor, to discuss editorial opportunities. [deanna.gillen@wbresearch.com](mailto:deanna.gillen@wbresearch.com)

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