

# Optimizing Field Service Experiences for a **Diverse Customer Base**

How Field Service Organizations Can Leverage Centralized Tools Across Geographies, Cultures, and Languages



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Research Contact:  
**Chris Rand**  
Research Manager, WBR Insights  
[Chris.Rand@wbresearch.com](mailto:Chris.Rand@wbresearch.com)

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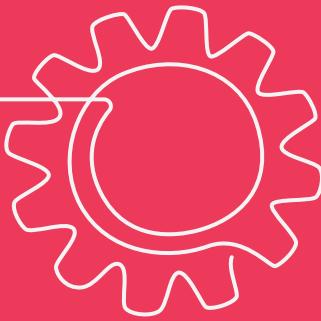
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# Table of Contents



- 3 Executive Summary**
- 4 Key Findings**
- 6 About the Respondents**
- 7 The Majority of Organizations Can Create a Consistent Experience Across Geographies**
- 10 Field Service Teams Are Generating a Contextual Understanding of Customers**
- 12 Customer Loyalty and Communicating Value Remain Top Challenges**
- 15 Conclusion: A Confluence of Technology and Human Experience**
- 16 Key Suggestions**
- 17 About Our Sponsor**
- 18 About the Authors**

## Executive Summary

Field service organizations must create a consistent and exceptional customer experience across geographies, cultures, and languages. But this capability hinges on their ability to leverage centralized digital tools for knowledge management, contextual analytics, and customer self-service while delivering fast, consistent results. These tools must contribute to real-time analysis, understanding, and empathy concerning unique customer problems and both geographical and cultural contexts as well.

With the right deployments, field service organizations have the potential to maintain or re-establish a “human touch” in their services in an increasingly remote but interconnected world.



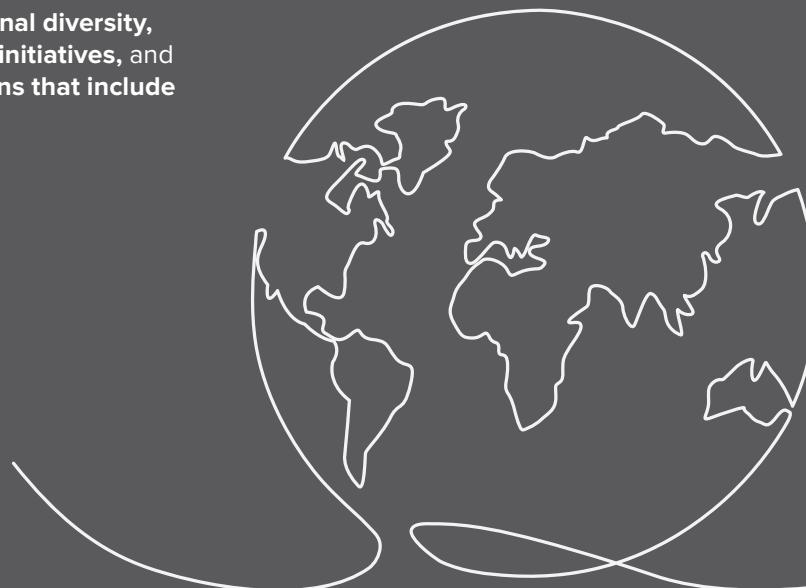
Characterized by empathy, direct communication, personalization, and over-the-top customer care, adding this human touch to service isn't simply good for a company's image; it's good for business as well. According to Deloitte, 37% of customers increase spending following a satisfactory problem resolution in field service.<sup>1</sup>

As field service organizations reach beyond borders and across new geographies, cultural competence has become more important than ever. This report explores what challenges field service organizations are facing while serving a diverse customer base, as well as what solutions they've put in place to improve outcomes for both their customers and customer-facing teams.

<sup>1</sup> <https://www2.deloitte.com/content/dam/Deloitte/uk/Documents/consultancy/deloitte-uk-smart-field-service-deloitte-pov.pdf>

# Key Findings

- ▼ **71%** of respondents **rate their organizations' customer experience across geographies, cultures, and languages as "exceptional" (31%) or "consistent" (40%);** but nearly one-third (29%) struggle to meet the needs of some customers of differing backgrounds.
- ▼ **56%** of the organizations in the study have **already implemented smart connected technologies** as part of their CX initiatives. Meanwhile, **84%** or more have implemented or plan to implement customer self-service platforms, omnidirectional communication tools, and knowledge management software for this purpose.
- ▼ **55%** of the respondents **rate their ability to include the "human touch" in their field service operations as "good" (47%) or "excellent" (8%).**
- ▼ **54%** of organizations in the study are **creating internal communication spaces to encourage new viewpoints on CX.** Half already **implement internal diversity, equity, and inclusion (DE&I) initiatives,** and half **already onboard solutions that include diversity tools and metrics.**
- ▼ In each case, **most companies have increased their focus on diversity in customer analytics (57%)** and have asked customers questions directly or via customer surveys (54%) in the past 12 months to gain a better contextual understanding of their customers.
- ▼ **63%** of the organizations **have deployed chatbots to improve customer self-service.** Half have deployed customer account portals for this purpose as well.
- ▼ Among five available options, most respondents consider either **maintaining customer loyalty (26%)** or **communicating the value of their services to customers (25%)** as **the number-one challenge** they face in their efforts to better serve customers.





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"Historically, service decisions have been made using only a fraction of available service data, causing blindspots into customer satisfaction and creating an environment of reactive problem-solving," says Shahar Chen, the CEO and co-founder of Aquant. "If you wait until you receive a negative NPS, it's too late. The new normal in service requires providers to approach customers with solutions before a customer comes to a provider with a complaint."

That kind of data-driven decision-making fosters better customer experiences and improves service outcomes. But before leaders can make informed decisions, they need to understand what story the data is telling — and that has been a roadblock for many organizations.

- *"If you wait until you receive a negative NPS, it's too late.*
- *The new normal in service requires providers to approach customers with solutions before a customer comes to a provider with a complaint."*
- *– SHAHAR CHEN, AQUANT CEO*

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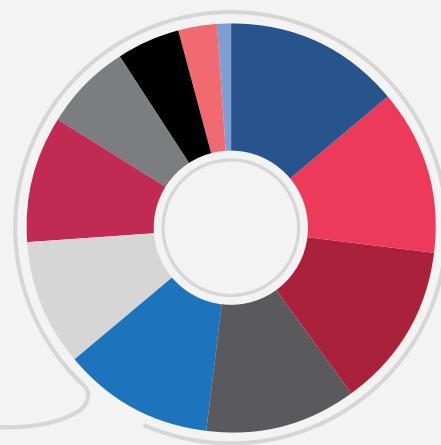
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# About the Respondents

Field Service Europe and the WBR Insights research team surveyed 100 field service leaders across Europe to generate the results featured in this report.

## What describes the area in which your organization provides service?

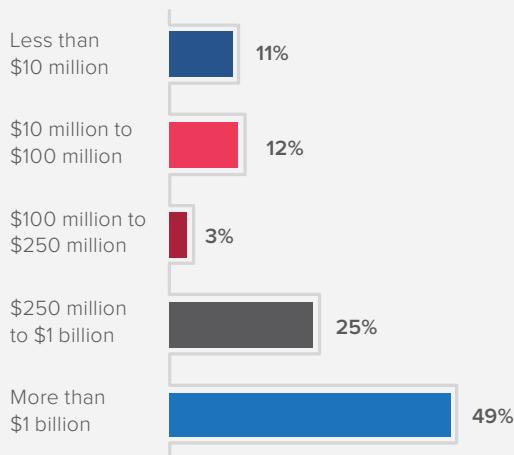


- 14% Manufacturing
- 13% Appliances & Electronics
- 13% Information & Communication Technology
- 12% Medical & Scientific Devices
- 12% Utilities
- 10% Construction & Industrial
- 10% Semicconductors
- 7% Transportation
- 5% Commercial Computers
- 3% Enterprise Network Equipment
- 1% Domestic Computers

The respondents represent organizations serving a variety of verticals, including manufacturing (14%), applications and electronics (13%), information and communication technology (13%), medical and scientific devices (12%), and utilities (12%), among others.

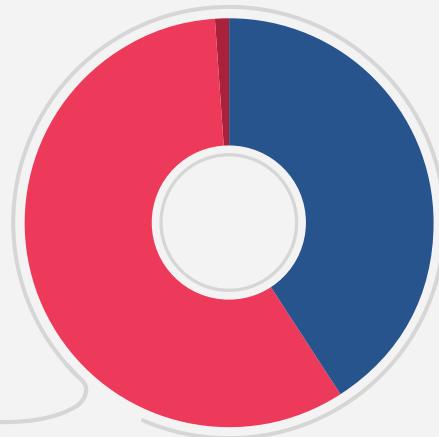
At 49%, almost half of the respondents are from larger companies that make more than \$1 billion in annual revenue. Another 25% of the respondents represent a company that makes between \$250 million and \$1 billion in annual revenue.

## What is your company's annual revenue?



At 58%, most of the respondents are directors. Among the remaining respondents, 41% are department heads and 1% are vice presidents.

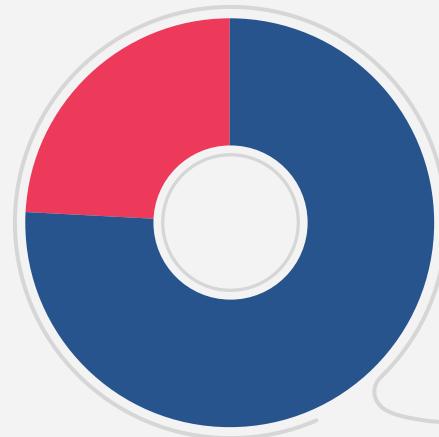
#### What is your seniority?



- 41% Department Head
- 58% Director
- 1% Vice President

A majority of the respondents (76%) occupy a role in field service management, while the remaining 24% occupy a role in field service operations.

#### What is your role?



- 76% Field Service Management
- 24% Field Service Operations

## The Majority of Organizations Can Create a Consistent Experience Across Geographies

Field service organizations now have a global reach. Some of the largest companies in this space service customers and assets across every continent, spanning multiple cultures and languages. In recent years, most field service organizations have worked to unify their operations by eliminating data silos across their markets and bringing their teams together via a single platform.

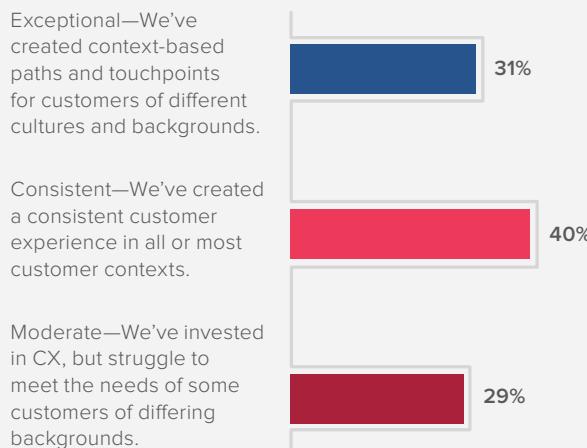
But there is also a growing impetus to create customer experiences that are more uniquely targeted and personalized, especially in terms of each customer's language and culture. When successful, building a diverse customer experience can eliminate barriers between the organization and its customers and create context-based paths and touchpoints for customers of every background. However, accomplishing this requires both new processes and technologies, as well as a heightened awareness of cultural complexities around the world.

According to the results of this study, most field service organizations believe their customer experience (CX) across geographies, cultures, and languages is either exceptional (31%) or at least consistent (40%). These companies have created context-based paths and touchpoints for customers of different cultures and backgrounds, or they have created a consistent customer experience in all or most of their customers' contexts.

CX consistency is a good starting point, but it shouldn't be the end goal of an organization's CX initiative, especially if that organization spans multiple cultures and geographies. Customer context is becoming increasingly important, and organizations that cater to their customers' unique needs in real-time can generate better customer outcomes.

Furthermore, 29% of the respondents each say their organization's customer experience across geographies, cultures, and languages is only moderate. They've invested in CX, but they struggle to meet the needs of some customers of differing backgrounds.

### How would you rate your organization's customer experience across geographies, cultures, and languages?

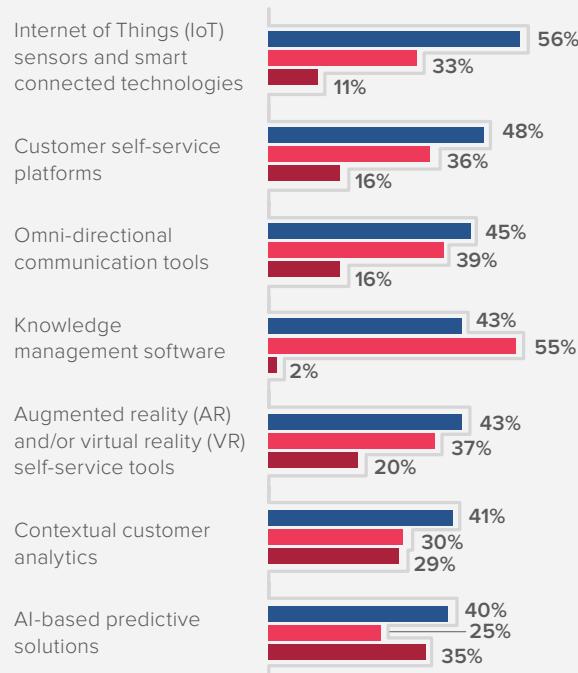


Although new processes and the training of technicians and customer experience representatives are important investments in diverse CX, technology also plays a role. It's through technology deployments that field service organizations can communicate effectively across cultures, help customers serve themselves, and generate real-time insights about customer needs.

Currently, 56% of the respondents have implemented Internet of Things (IoT) sensors and smart connected technologies to draw data and insights from their deployed assets. This is becoming a core capability for field service organizations, and not just from a CX perspective. IoT sensors enable organizations to develop new, more proactive business models, such as Outcome-as-a-Service.

### Which digital tools have you implemented as part of your CX initiatives?

- We have implemented this technology.
- We are planning to implement this technology in the next 12 months.
- We have no plans to implement this technology in the next 12 months.



IoT sensors and smart connected technologies are the only digital tools a majority of the respondents have implemented based on the list of technologies presented to them.

However, 98% of the respondents have implemented (43%) or will implement (55%) knowledge management software to record, transfer, and proliferate knowledge internally and among their customers.

Effective knowledge management can improve efficiency, but it is also essential for improving KPIs like first-time fixes (FTF) and Net Promotor Scores (NPS). Capturing and organizing both implicit and explicit knowledge allows the organization to create feedback loops for improvement, share essential knowledge about customers, and harness useful data to deliver outcomes.

The respondents were asked to describe a service scenario in which digital knowledge management tools helped resolve an issue or produce a positive result. Several respondents indicated that knowledge management tools were particularly useful during the pandemic, either through direct applications of that knowledge via technology or by assisting customers via self-service.

“In the current pandemic, quite a few of our experienced technicians were affected,” says a director of field service management at an information and communication technology company. “It was down to the ones with limited experience, but the storage of knowledge made them handle situations in the best possible manner.”

“As the pandemic increased its impact, most of our field activities were supported by digital solutions that helped client technicians handle most of the situations,” says a field service operations department head at a construction and industrial company.

Meanwhile, a field service management department head from a medical and scientific device manufacturer says, “Digital knowledge has helped us fix critical medical equipment without much hassle during the pandemic.”

Other respondents say that their knowledge management tools assisted them in challenging client situations.

“There was a tense situation where a major client was not accepting a certain solution,” says a field service management director at an information and communication technology company. “But as we provided all the information after analysis, it made a lot of sense to upgrade per our recommendation.”

Similarly, another respondent says, “There was a situation where we had local experts visit a service scenario, and this escalated to a level very close to me. But a few analytical processes by data experts led us to fix the situation with a much better outcome.”

It’s promising that most respondents either have implemented or plan to implement every technology presented in this part of the study.

The only technologies significant portions of the respondents won’t implement are AI-based predictive solutions (35%), contextual customer analytics (29%), and augmented reality (AR) or virtual reality (VR) self-service solutions. Companies may be holding off on these capabilities because they lack the foundational technology to support them or because they aren’t relevant to their area of service, especially in the case with AR and VR.

Of course, technology alone can't support a holistic and diverse CX strategy. Although automation and self-service are becoming the norm in field service, the human touch—empathy, person-to-person communication, and personalization—is still integral to making real connections with customers.

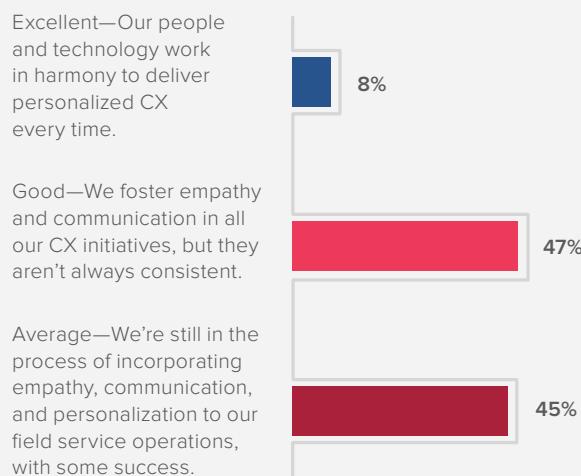
Only 8% of the respondents rate their organization's ability to include the human touch in field service operations as "Excellent." At these companies, field service reps and technicians work in harmony with technology to deliver a personalized customer experience in every interaction.

The remaining respondents are about evenly split over their success in this area. Although 47% of the respondents foster empathy in communication in their CX initiatives, they aren't always consistent. Another 45% say they're still in the process of incorporating the human touch into their operations, but they've seen some successes.

Fostering a culture of empathy and understanding is a challenging prospect for most organizations, as these fundamental human characteristics are difficult to institutionalize. Still, they are vital to the field service experience.

Organizations should look to their internal culture first to make changes in this area, as this will make it easier for team members to incorporate empathy and communication into their daily interactions with field service customers.

**How would you rate your organization's ability to include "the human touch" (i.e., empathy, communication, personalization) in its field service operations?**



## Field Service Teams Are Generating a Contextual Understanding of Customers

To provide context-based services that can span cultures and geographies, field service organizations must introduce new strategies alongside their field service and communication technologies.

Managing change within the organization is always a challenge, but when new processes are introduced as part of the broader effort toward digital transformation, the organization has more opportunities to turn its investments into meaningful results for customers.

Currently, 54% of the organizations surveyed have created internal communication spaces to encourage new viewpoints on CX. This is an important strategy for decision-makers, as it enables field service representatives to share their knowledge and experience so that they can inform high-level decisions and investments. Meanwhile, half of the respondents have implemented internal DE&I initiatives, and half have onboarded new recruiting and CX solutions that include diversity tools as metrics.

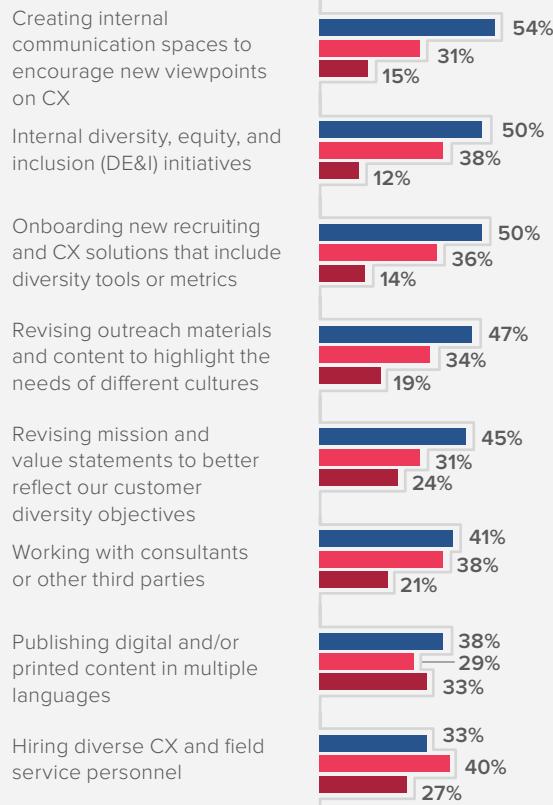
Most of the respondents haven't implemented the other strategies presented, but among those that have not, most plan to in the next 12 months. For example, most organizations will have revised outreach materials to highlight the needs of different cultures, and most will have revised their mission and value statements to better reflect their customer diversity objectives in the next 12 months. Although these steps may seem small when compared to larger changes, they are critical in forging a way forward for diverse CX.

Similarly, field service organizations are implementing changes that will help them generate a better contextual understanding of their customers. For example, 57% of the respondents say they will increase their focus on diversity in customer analytics, while 54% say they will ask customers questions directly or conduct customer surveys to generate better understanding.

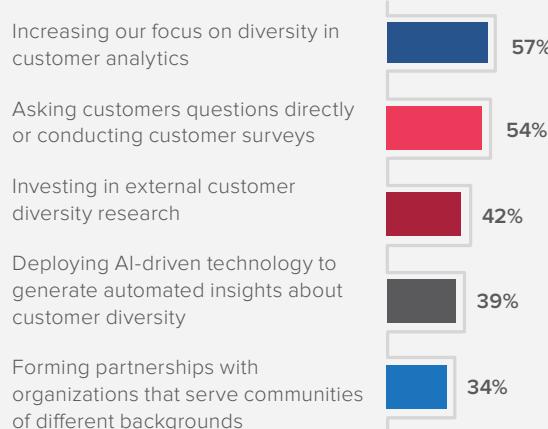
When combined with informative technologies and the strategies in the previous questions, these approaches can help organizations create more accurate customer profiles. By providing technicians and representatives with this contextual information, organizations will be able to adapt their services to meet the needs of a diverse set of customers.

### What strategies have you implemented or do you plan to implement to better serve customers of different cultures?

- We have implemented this strategy.
- We are planning to implement this strategy in the next 12 months.
- We have no plans to implement this strategy in the next 12 months.



### In the past 12 months, what approaches have you taken to gain a better contextual understanding of your customers?



# Customer Loyalty and Communicating Value Remain Top Challenges

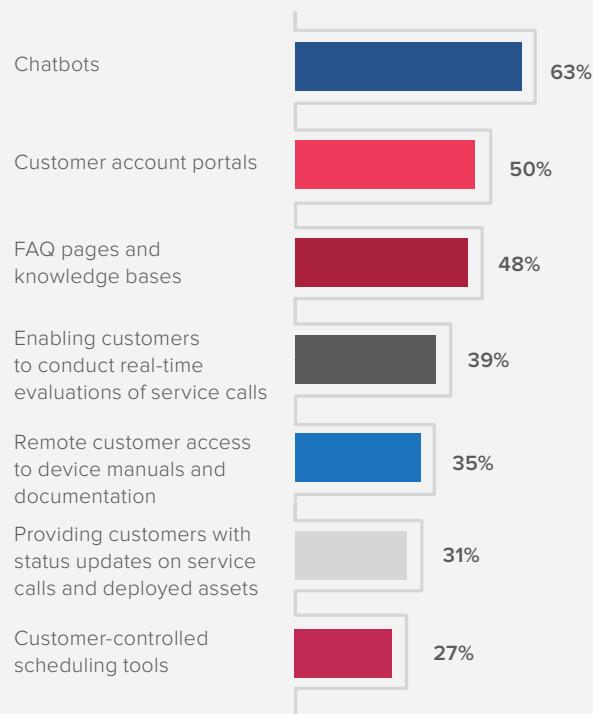
Field service organizations are focusing on two key capabilities for improving their ability to assist a diverse customer base while also delivering insights for the organization. However, it hasn't been until recently that these capabilities have become feasible for most field service organizations, and some companies are more mature in their deployments than others.

For example, 63% of the respondent say they have already deployed chatbots to improve customer self-service. These tools are in widespread use in multiple industries. When attached to a knowledge base, automated chatbots can provide customers with answers to frequently asked questions, provide important documentation about assets, and respond to general inquiries. Still, only 48% of the respondents say they leverage FAQ pages and knowledge bases to assist customers and only 35% say they provide remote customer access to device manuals and documentation.

Meanwhile, only 50% of the respondents say their customers have a dedicated account portal to improve self-service. What's more, only 31% of the respondents provide customers with status updates on service calls and only 27% provide customers with their own service scheduling tools.

All of these tools may not be relevant in every service industry, but they can provide customers with much higher levels of connectivity and a means by which to resolve issues faster. Status updates, for example, can take the form of simple automated messages sent to a smartphone or email address, enabling customers to access the same information about deployed assets as the field service team or manufacturer itself.

## Which capabilities have you deployed to improve customer self-service?



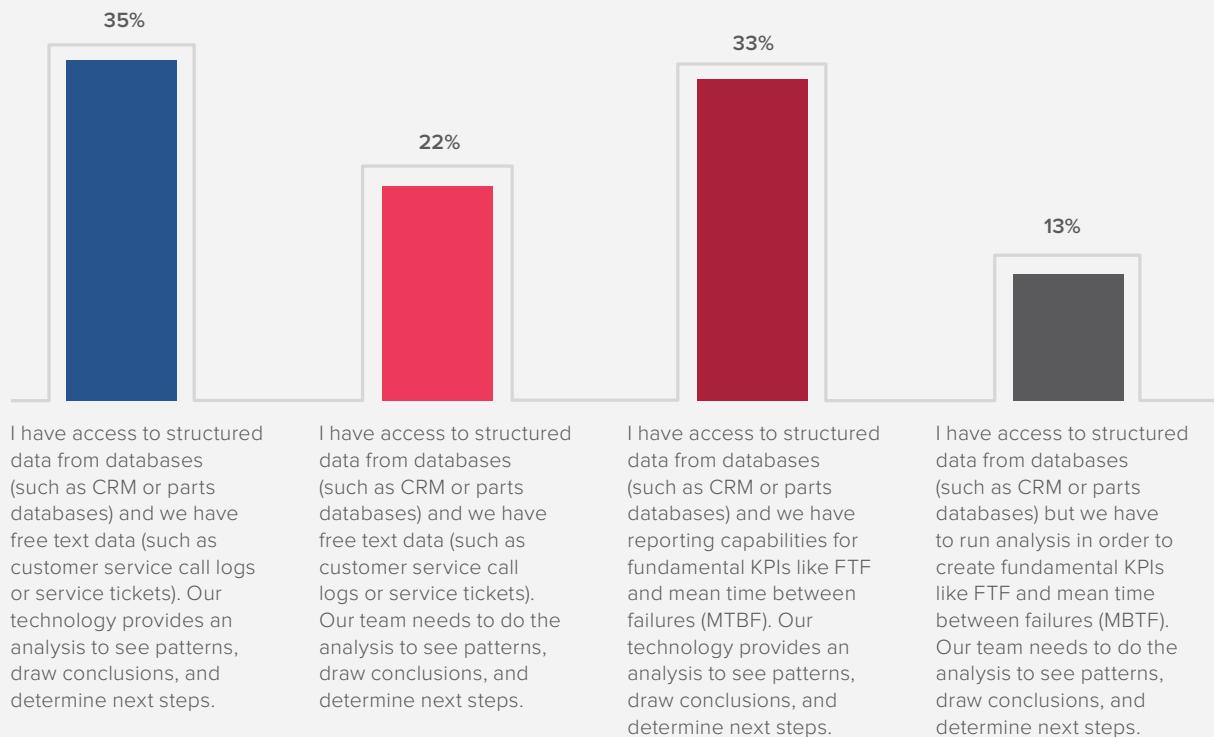
Additionally, the respondents note that they've made strides in accessing customer insights through their current suites of technology tools, even though manual analysis of data is still a requirement for some. At 35%, over one-third of the respondents have access to structured data from databases and free-text data. Their technology also provides them with analyses that help them see patterns, draw conclusions, and determine their next steps regarding their customers.

However, 22% of the respondents have these same capabilities, but their team needs to conduct a manual analysis to see patterns.

Similarly, 33% of the respondents have reporting capabilities for fundamental KPIs like FTF and mean time between failures (MTBF), and their technology provides an analysis of these patterns. Only 13% have these capabilities but must conduct a manual analysis to generate KPIs nonetheless.

Altogether, 68% of the respondents have reached a significant level of maturity regarding the insights they can access. These organizations are successfully leveraging their data technology to improve the customer experience.

**When it comes to the ability to better service customers, what level of insights are you able to access using your current suite of technology tools?**

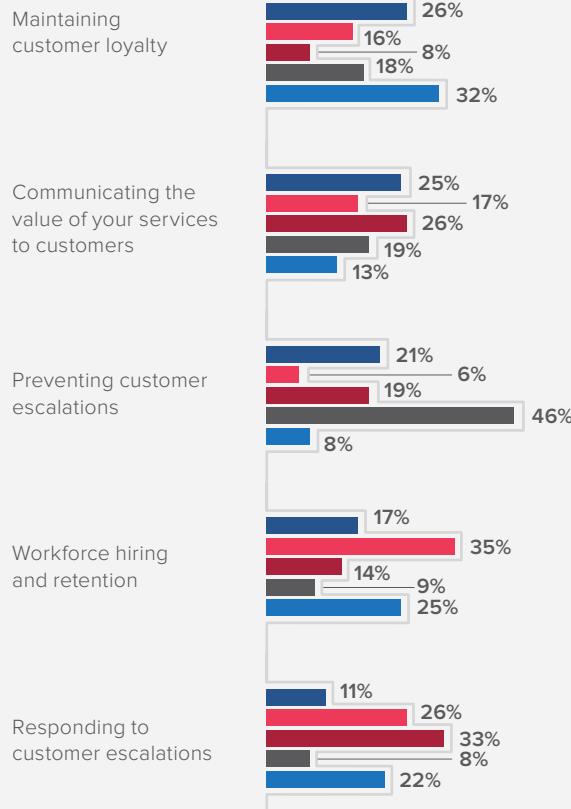


Nonetheless, sincere challenges remain to organizations' ability to better serve their customers. Most of the respondents list either maintaining customer loyalty (26%) or communicating the value of services to customers (25%) as their top challenge. Meanwhile, 35% of the respondents list workforce hiring and retention as their second-most important challenge, and 26% list responding to customer escalations as their second-most important challenge.

Technologies and new processes could provide solutions to these challenges. In written responses, many respondents mentioned that knowledge management solutions were integral to providing new technicians with knowledge and resources in the field, which could assist with training and retention. By implementing new communication tools and by integrating the analysis of customer contexts into the service experience, organizations could inspire more loyalty among their customers and communicate the value of their services more effectively. This is especially true among customers of various cultures and backgrounds, as well as those that speak different languages.

**What are the top challenges you face in your efforts to better serve customers, "1" being the "most challenging" and "5" being the "least challenging"?**

▼ 1 ▼ 2 ▼ 3 ▼ 4 ▼ 5



# Conclusion:

## A Confluence of Technology and Human Experience

To gain a better understanding of how humans and CX technologies will work in tandem to deliver better, more contextualized customer experiences across regions and cultures, researchers asked the respondents to describe their future vision for diverse CX in the field service industry. Most of the respondents agree that they wouldn't have their current field service capabilities today without the technology they've deployed.

However, they also agree that technology is no replacement for a human and that technology exists to assist humans in the field, whether they are technicians or customers.

"Technology is there to make things easy for us humans," says a vice president of field service management at a manufacturing company. "It's important to remember that we, in any department, would not be able to provide the majority of our services without technology."

"Technology holds the power to analyze, and humans hold the power to work based on those analyses," says a field service management director at a medical and scientific device company. "When we combine things, the results are usually accurate."

Meanwhile, a field service operations director at a utility company says, "Customers need quality in service for every request. This quality can only be achieved at a confluence of humans and technology."

Other respondents recognize that their technology solutions will have a direct impact on the technician and customer experience, regardless of their background.

For example, according to a field service operations director at an appliance and electronics company, "Technology provides a whole new level of visibility and control to humans in the field irrespective of [their] background."

Similarly, a field service management department head says, "Even though customers are of diverse backgrounds, their challenges remain similar. Technology can help us identify challenges with better accuracy and deliver committed solutions to every challenge that the field service personnel face."

It's clear that many field service leaders view technology as a tool for enabling technicians to deliver better customer experiences, regardless of each customer's context. As we've seen, many organizations face challenges in serving their diverse customer bases, but they are making significant progress in both their strategies and their technology implementations. If these written responses are any indicator, technology will surely empower field service technicians and representatives to provide a contextualized experience to every customer.



# Key Suggestions

- ▼ **Deploy effective knowledge management tools to help your technicians access resources while in the field.** A knowledge management system can also be incorporated into your self-service program, enabling customers to access resources and solve problems on their own. Several respondents noted that knowledge management tools have been essential during the pandemic.
- ▼ **To incorporate empathy, communication, and personalization into your service experiences, start with internal cultural change.** Conduct an audit of your existing company culture programs, as well as your DE&I initiatives, then implement changes based on any challenges or pain points that are revealed.
- ▼ **Create internal communication spaces to encourage feedback from your technicians and representatives.** Deploy CX solutions that include diversity tools and metrics to begin tracking your progress to a more context-based customer experience.
- ▼ **Gain access to structured data from databases and free-text data (such as customer service call logs or service tickets).** Implement technologies that provide analyses of this data, identify patterns, and report on fundamental KPIs like FTF and MTBF.



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# About the Authors



We launched Field Service in 2002 and have been dedicated to supporting the growth of the service industry ever since. What started off as 100 people in a room discussing the future of service has become 500 senior-level service executives being inspired while learning and developing their company as well as their careers.

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