



USE CASE

Retail Field Service Management software unlocks control over the customer journey

In the retail sector, providing impeccable after-sales support is non-negotiable. The strength of brand loyalty can be tested when customer interaction is shifted from the trusted retailer to the Original Equipment Manufacturer (OEM) or to service repair providers. This transition can introduce uncertainties and potential disconnects in the customer experience.

Retailers' responsibility goes beyond the point of sale.

The assurance of seamless and efficient service is what solidifies their reputation in the eyes of the customer. A hiccup in this process can result in more than just a one-time transaction loss, it can jeopardize long-term customer relationships. This is where Field Service Management (FSM) software becomes indispensable.

We'll explore how FSM software can be integrated into the retail industry while addressing the shared concerns of both retailers and consumers about after-sales service.

” 86% of customers are willing to pay more for a better customer experience

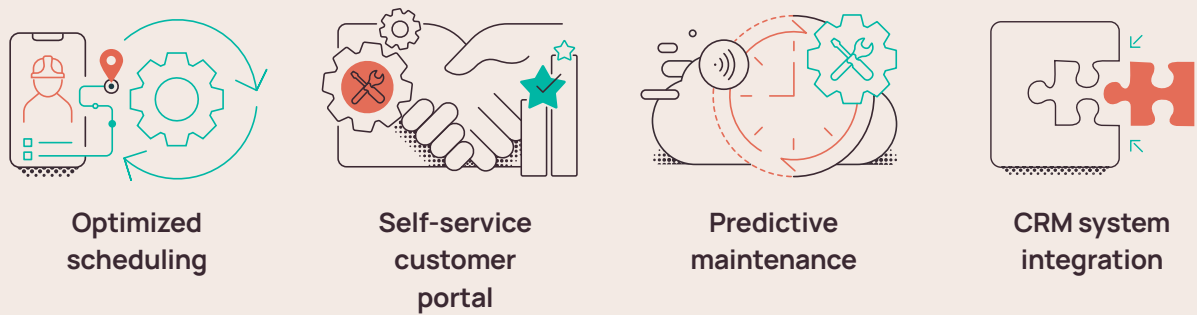
- Newman, 2020 Forbes article

The path to maximizing retail success and after-sales service excellence

Retail industry challenges



FSM feature solution



Achievements with Fieldcode*

Up to

→ **25%**

cost and time savings by eliminating dedicated maintenance trips.

Through **optimized planning**, maintenance tasks can be scheduled at the same time as repair visits to stores, eliminating the need for dedicated trips.

Up to

→ **20%**

increase in customer satisfaction due to appointment notifications.

The implementation of **Fieldcode's customer portal** leads to **better-informed customers** regarding their service appointments, resulting in a notable boost in overall customer satisfaction ratings.

Maintaining service quality control with FSM



- Service scheduling software allows retailers to allocate resources efficiently, ensuring that service tasks are assigned to the right technicians based on their expertise and availability. For instance, if a customer in an electronics store experiences an issue with a recently purchased product, **smart scheduling software ensures a technician with expertise in that product category is assigned.**
- Retail dispatching software efficiently **directs technicians to multiple locations, vital for large retail chains with a network of stores that may require simultaneous service.** Integrated GPS technology allows for precise dispatching and real-time location tracking for accurate arrival estimates, whether for service calls or coordinating the delivery of goods to store or customer locations. Furthermore, integration with inventory management minimizes delays by dispatching technicians with the right tools and parts, enhancing on-site service efficiency.
- Real-time tracking capabilities allow retailers to monitor service progress instantaneously. This ensures that service requests are promptly attended to. For instance, if a clothing store needs HVAC repairs, **real-time tracking ensures that the technician arrives promptly,** minimizing discomfort for customers and staff.
- The FSM scheduling tool allows for **seamless adjustments to accommodate changing priorities and emergency repairs.** For instance, if a customer reports an urgent malfunction in a point-of-sale (POS) system, the FSM software promptly prioritizes the request. It then dispatches a technician with specialized expertise in that specific system, guaranteeing a rapid and thorough resolution.

Continuous customer engagement with a seamless digital experience

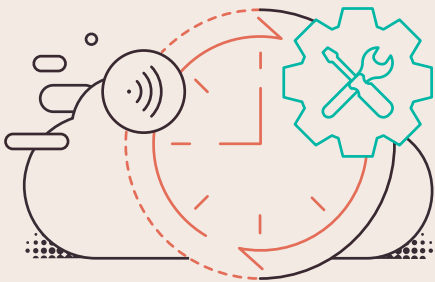


- A digital self-service customer portal empowers customers to have the **autonomy to conveniently book, reschedule, or cancel appointments online**, aligning seamlessly with their busy schedules. For instance, a customer purchasing a new appliance can easily use the portal to schedule an installation service at their preferred date and time. This streamlined process ensures maximum convenience and enhances overall satisfaction.
- **A digital portal enables customers to effortlessly submit new service requests** for retail repairs, effectively reducing call volumes and alleviating strain on call center resources. This empowers customers to take control of their service needs.
- Automated timely notifications ensure customers are kept in the loop throughout the service process. **Customers can instantly access and monitor the estimated time of arrival and current locations of field service technicians** in near real-time.
- A digital portal facilitates retailers to have the **ability to create individual profiles for each customer**, storing information such as purchase history, product preferences, and communication preferences. This data allows for tailor-made after-sales interactions, resulting in a more personalized experience.

” 67% of customers prefer self-service over speaking to a company representative

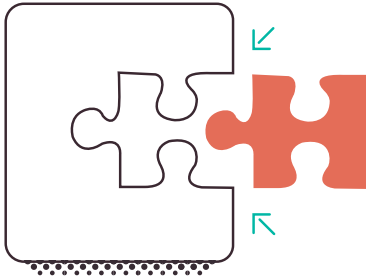
- Nuance, 2023

Strengthening long-term customer loyalty with predictive maintenance



- FSM software with predictive maintenance capabilities enables retailers to **anticipate potential issues such as downtime for high-value equipment before they occur**. For example, if the system detects a decline in the performance of a POS system, it can automatically trigger a maintenance request. This proactive approach driven by predictive algorithms prevents unexpected breakdowns and ensures that customers can rely on uninterrupted service.
- **Sensor-driven monitoring and real-time data analysis on vital equipment help retailers such as grocery or pharmaceuticals preserve the quality of their products.** By ensuring that equipment, such as refrigeration units, are functioning optimally, retailers prevent spoilage or degradation of products. This ensures consistent product quality and reinforces brand loyalty.
- **Scheduling predictive maintenance during off-peak hours or periods of low customer traffic minimizes service disruptions.** This drastically reduces the impact on operations and ensures that customers can continue to shop without any inconvenience.
- Predictive maintenance prolongs the lifespan of assets by identifying and resolving potential issues before they lead to costly breakdowns or the need for premature replacements. Retailers can use this data to **make informed decisions about equipment investments, replacements, and operational strategies.**

FSM and CRM integration for effective personalized support

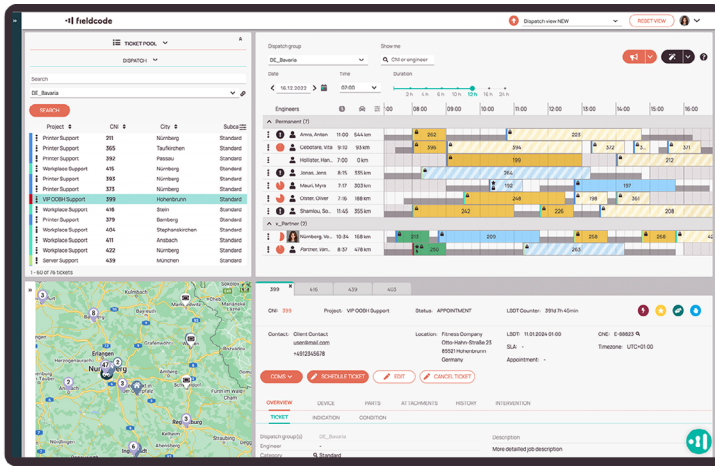


- Integration of FSM and CRM provides a comprehensive view of each customer, including their purchase history, preferences, and communication preferences. This allows field service technicians to **offer highly personalized service and product recommendations**. For example, if a customer consistently purchases specific products, technicians can suggest complementary accessories or even upgraded models.
- FSM and CRM integration allows for seamless communication between the field service team and the customer. Technicians can share detailed information about the service performed, and even process transactions directly through the system. Additionally, the CRM can be used to **automate post-service follow-ups, such as gathering feedback and ensuring customer satisfaction**.
- Integration ensures that information flows seamlessly between field service teams and other departments, such as sales and marketing. This enables a unified approach to customer interactions, **ensuring that all teams have access to the same customer data and can deliver consistent messaging and service quality**. For instance, when goods are purchased, the integrated FSM and CRM software not only trigger push notifications to technicians for product sales and free delivery offers but also automatically schedule the delivery, providing corresponding instructions in their work orders.

Enabling retail excellence through Fieldcode's FSM solution

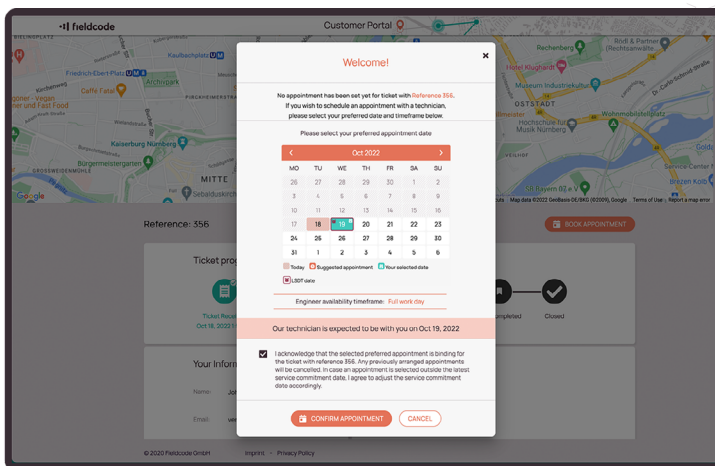
Features that enhance retail field service operations.

Scheduling and dispatching

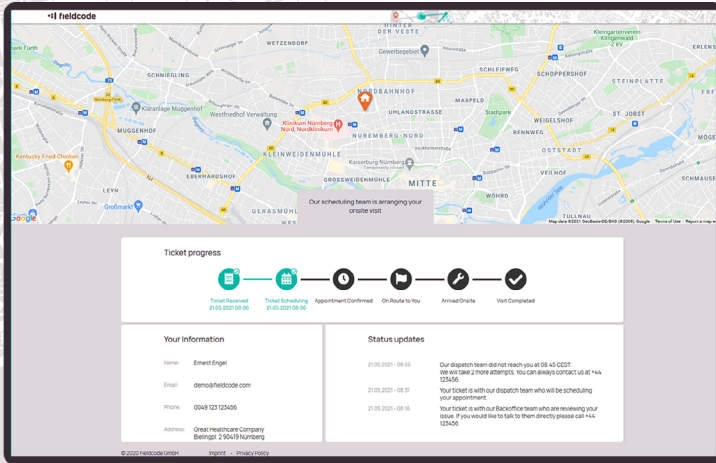


→ Fieldcode's AI-driven scheduling and dispatching software validates and assigns incoming tickets to the right technician and optimizes route planning.

Customer Portal

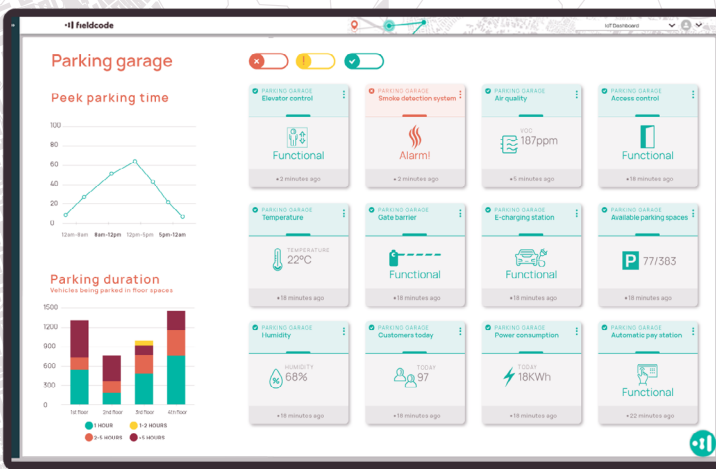


→ Customers can autonomously book, reschedule, or cancel appointments online. Appointments are seamlessly dispatched, and notifications are sent to customers.



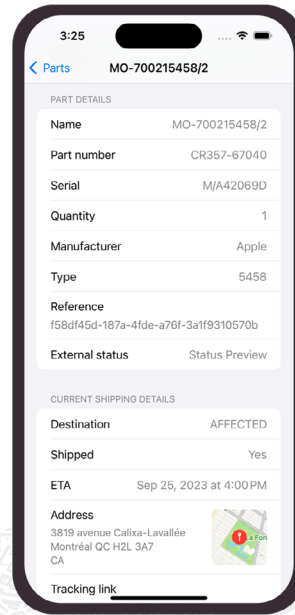
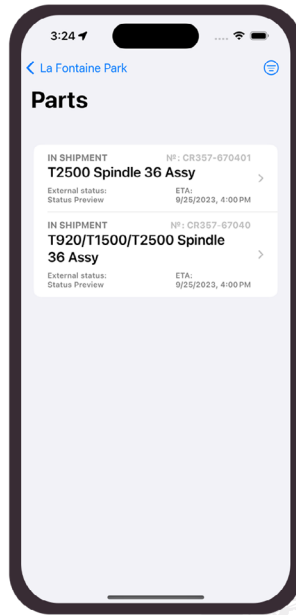
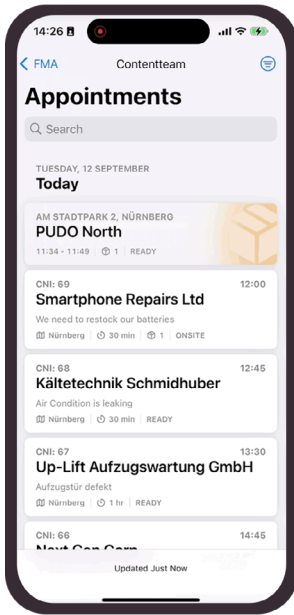
→ Communication via a customer portal provides **real-time updates on the status of customer service requests** and the technician's estimated arrival time.

Predictive maintenance



→ Regardless of the number of assets, Fieldcode IoT field service utilizes IoT data to **trigger alerts for preventive, unplanned, or repair service actions.**

Tailored services



→ Quality control through automated guided workflows to business-specific needs with **tailored proactive user guidance and automated instructions for all technicians.**



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