



Savvy companies know that providing quality service is a way to gain a competitive edge. Strong customer service helps retain existing customers, build customer loyalty, and generate new sales. To support this goal, forward-looking companies need to equip their field service personnel with a powerful integrated tool.

SAP Solution Brief

mySAP™ CRM FIELD SERVICE

By using mySAP™ CRM, employees are empowered with extensive and up-to-date information to solve problems and offer optimum value-added service to customers.

mySAP™ CRM SETS THE COURSE FOR GREATER MARKET SUCCESS

The mySAP™ Customer Relationship Management (mySAP CRM) solution is part of the mySAP™ Business Suite of solutions and services that empowers employees, customers, and business partners to better collaborate and focus on customer relations – anytime, anywhere. mySAP CRM supports various business scenarios for marketing, sales, and service. It pulls information from a single, consistent set of data within your enterprise information system, allowing marketing, sales, and service personnel to synchronize their efforts in supporting customers. The resulting benefits for the organization include reduced costs, higher revenues, improved margins, and most important, greater customer satisfaction and higher customer retention.

mySAP CRM provides a suite of tools designed to meet the needs of your field service force. It provides service representatives, using mobile laptops, handheld devices, and tablet PCs, with an integrated view of customers, actual and historical service orders, details regarding customers, service contracts, and other service relevant information. By using mySAP CRM, you can:

- Plan and manage the delivery of services
- Obtain the information your team needs to carry out service orders on-site
- Manage the service orders assigned to field service personnel
- Generate service billing
- Analyze the financial and operational health of the service business

RESOURCE PLANNING AND OPTIMIZATION

The challenge of maintaining accurate, timely communications with mobile service workforces can have a significant impact on your organization and its customers. Inefficient service and unhappy customers can result from a variety of problems, including dispatchers who are unaware of field service representatives' vacation schedules, missed communications between representatives and dispatchers, and the inability to schedule on-site representatives' appointments accurately.

Using the resource-planning capabilities of mySAP CRM, you can plan the activities of service employees and service requests. You can also dispatch service assignments to the most appropriate employee, based on a variety of parameters including availability and qualifications.

And with mySAP CRM mobile service, your team can view their service assignment calendars along with activities in Microsoft Outlook – such as tasks and appointments – on a daily, weekly, or monthly basis.

In addition, your field service representatives can exchange data such as assignments, absences, attendances, and service activities between your mobile service application and the resource-planning tool in the service center. Service representatives can accept or reject a received assignment based on their schedules.

They can also flexibly rearrange and manage data according to their own preferences. Using the powerful search function within mySAP CRM, users can identify particular service orders, or even sort service orders according to preferred criteria for efficient handling. This information is communicated to resource planners so they are fully aware of your service employees' availability and their specific schedules of activities.

SERVICE ORDER MANAGEMENT

mySAP CRM offers complete, closed-loop transaction functionality that lets service representatives manage requests for service – from initial service order creation through to final service order confirmation.

Service order and request management capabilities in mySAP CRM deliver comprehensive, end-to-end visibility and process management by integrating fully with customer entitlements, warranties, and material and billing functions.

Service orders contain valuable information for service processing. Using mySAP CRM, field service representatives not only have ready access to this data, they can also drill down to supporting information. Information available includes:

- Basic order information, such as order priority, order execution date and time, affected components, problem description, customer name, and contact information
- List of service activities to be carried out
- Planned material allocations
- Service order creation on-site
- Attachments to the service order

Service representatives can also access detailed asset, order, and customer information. This includes detailed information regarding the installed customer base, information about customer contacts, and service progress. This information paints a clear picture of the activities that need to be performed for a particular service order and provides the service representative with insight into the history of the customer and assets in question.

After a service activity has been performed, service employees can carry out the necessary confirmation reporting for service orders. For example, your service team can create:

- Time confirmations – time spent on the repair activity, traveling expenses incurred, and so on
- Material confirmations – planned and unplanned material consumption for a service order
- Technical back reports – detailed activity reports that list service items, item defect causes, and activities undertaken to solve a problem
- Text confirmations – short text statements entered for confirmation, which can be referenced for repairs or customer interactions in the future

mySAP CRM also offers full-integration capabilities. The activities of your field service personnel can automatically trigger back-end processes. For example, activities in departments such as engineering and purchasing can be triggered directly by a service representative's actions in the field. In addition, service employees can print out activity reports in predefined formats and provide service details to customers while on-site.

OTHER HIGHLIGHTS

mySAP CRM equips your mobile service professionals with functions for managing the depth and breadth of service processes. For instance, it allows them to:

- Create complaints – Field service representatives can create complaints in the field, using laptops or handheld devices. The information is then forwarded to the service center for resolution.
- Display an overview of important master data – An integrated view of all relevant master data can be displayed, including the customer base, product and service master data, and customer and contact person. Service personnel can also access all dependent and supplementary information.

- Receive the latest repair bulletins – The service information center ensures that service representatives receive the right information at the right time, including time-sensitive materials and critical news and information.
- Manage a customer's installed base – Service personnel can shift installed-base components from one location to another.
- Manage van stock – Service representatives can allocate and monitor the consumption of van stock materials designated for an individual representative, location, or vehicle.
- Access a progress snapshot – Since services may involve several steps and multiple business partners, the progress snapshot provides a comprehensive view of the complete project and its status.

MOBILE SERVICE HANDHELD CAPABILITIES

Through its mobile service handheld capabilities, mySAP CRM provides field service representatives with the information they need to perform services even when they are offline and at customer sites. For example, it delivers business partner and assignment information, as well as confirmations. And, it enables integration between dispatching tools and mobile devices.

Other key mobile service features and handheld capabilities within mySAP CRM include:

- Support for all popular mobile device platforms, including PDAs, smart phones, and tablet PCs
- Support for multiple underlying network infrastructures
- One common management environment your company can use to define roles and deploy infrastructures and applications
- Support for online and offline connectivity methods
- Support for full, offline functions of wireless devices through device-resident applications and data storage

BENEFITS OF FIELD SERVICE SUPPORT

Just as automating the back office has produced numerous benefits for the enterprise, automating field service processes can provide benefits for your organization, your field service representatives, and your customers, including:

- Greater customer satisfaction and retention – With mySAP CRM and back-office information, field service representatives can better meet the needs of customers and improve the timeliness and quality of services delivered.
- Increased productivity – mySAP CRM gives field service representatives immediate access to detailed customer information so they can complete service calls faster. More time is spent on actual servicing instead of on chasing down information.
- Motivated field service representatives – Field service personnel are supplied with tools that enable them to perform their jobs better, which leads to greater personal satisfaction. They can readily access critical back-office information directly, without having to track down other people in the organization to request the information. This speeds the flow and accuracy of information to the service representative.
- Lower costs – Automating service tasks reduces transaction costs. Moreover, integration of mySAP CRM and your back-office system eliminates costly delays and allows you to act on opportunities as they arise.

mySAP CRM: ENSURING SUCCESS IN HIGHLY COMPETITIVE MARKETS

mySAP CRM helps you deliver the level of service required to succeed in tough markets. For example, it helps you:

- Deliver standardized customer service processes with a more personal touch
- Increase customer satisfaction, loyalty, and lifetime value
- Perform better planning and use company resources more effectively

- Reduce staff turnover rates by increasing employee job satisfaction
- Integrate sales, service, and marketing with the entire enterprise
- Increase revenue by developing, offering, managing, and analyzing value-added service packages to meet market requirements and corporate objectives

INTEGRATE MOBILE SALES AND SERVICE WITH mySAP CRM

The mobile sales and service capabilities of mySAP CRM are closely linked. These functions are built on a common technical platform and share business components.

This close connection allows you to develop and build on synergies between the sales and service departments. Having complete information about customers helps both sales and service personnel. For example, perhaps before visiting a customer, a sales representative checks the customer's service records and finds that there have been multiple repair orders. Noting that the customer was unhappy with the quality of the goods, the sales representative can go to the meeting better prepared – or even with a solution to the problem.

Customer visits by service employees can benefit the sales department in several ways. First, while on-site, field service representatives can obtain valuable information about customers that may be useful, but is generally unavailable to sales reps, such as details about customer satisfaction, competitor activities, and product-related feedback. Second, customer visits by service employees present a chance to find out about new leads and opportunities, which can be shared with the sales team through mySAP CRM.

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EXTEND YOUR SERVICE CAPABILITIES WITH mySAP CRM

mySAP CRM is a natural extension of your service organization. This powerful solution:

- Gives your service staff access to all the information and tools required to make your concept of high-quality customer service a reality
- Speeds the flow of information between field service and the service center
- Shortens service cycles by accelerating your response to customer problems and needs
- Creates synergies between service, sales, and marketing departments through its integration with mySAP CRM mobile sales capabilities
- Integrates with fulfillment, inventory management, billing, controlling, and human resources systems

SAP® Mobile Service 3.0 (SAP® R/3® Edition) is available to customers who run their service handling in SAP R/3 Customer Service and would like to enhance their businesses with a mobile service solution that integrates with that system.

SAP Mobile Service 3.0 (SAP R/3 Edition) is also an option for customers who are already using SAP Mobile Service 2.0C (SAP R/3 Edition) and run their service handling in SAP R/3 Customer Service. This enables them to use sales and marketing processes in CRM 3.0 in a combined solution.

GET THE FULL STORY

To learn more about how mySAP CRM can empower your mobile service operations, please visit our homepage at www.sap.com/crm

mySAP™ BUSINESS SUITE:**YOUR INDUSTRY. YOUR BUSINESS. YOUR FUTURE.**

mySAP™ Business Suite provides unlimited scalability, best-of-breed functionality, complete integration, and easy collaboration over the Internet for every business.

Each mySAP Business Suite solution is powered by the SAP NetWeaver™ technology platform, a comprehensive integration and application platform that helps reduce total cost of ownership. mySAP Business Suite consists of best-of-breed solutions that incorporate powerful core functionality, industry-specific features, and best practices based on three decades of SAP experience.

It all adds up to a family of solutions that work together seamlessly to help you achieve your business goals.