Improve Operational Efficiency of Your Field Services

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Agenda For Today

- Field Services at A Glance
- Connecting Your Field Workforce with Boomi Flow
- Demo Scenarios
- Achieving Business Outcomes via Boomi Flow

Field Service Management

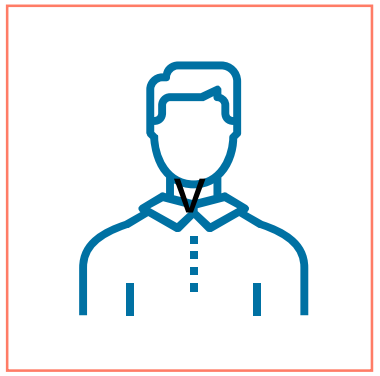
Field service operations dispatch technicians to customer locations to provide services, typically installation, repair or maintenance, for customer-owned equipment or systems. The equipment or systems may be actively managed, maintained and monitored under a predefined service or maintenance contract.

Source: Gartner Inc, Magic Quadrant for Field Service Management, September 2017

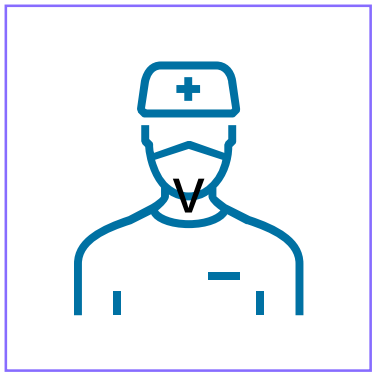
The Field Service Employee

Technician

Construction Workers



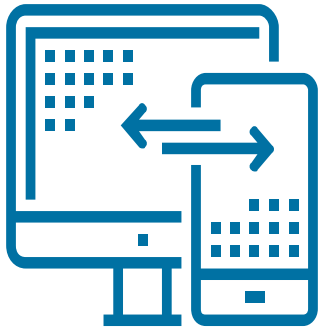
Sales



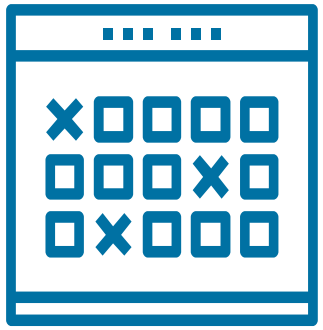
Emergency Workers

Key Technology Challenges Impacting Field Services Operations

Manual, Error – Prone Processes



Lag Between Data



Service Time Tracking and Scheduling

By 2020, 70% of organizations will cite customer satisfaction as a primary benefit derived from implementing field service management

Gartner®

Source: Gartner Inc, Magic Quadrant for Field Service Management, September 2017

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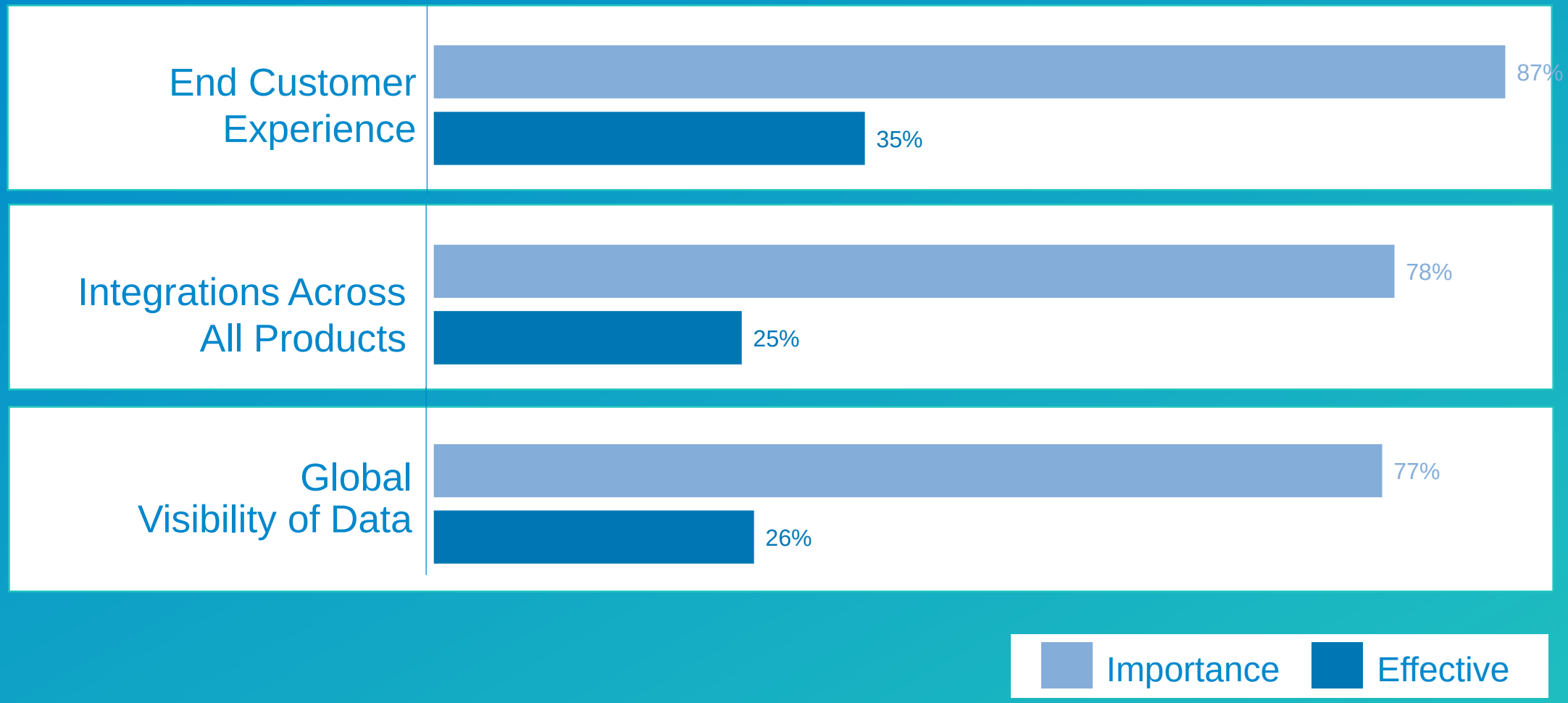
The Customer Experience - Technology Gap



Source: Harvard Business Review, Customer Experience Technology Gap, December 2017

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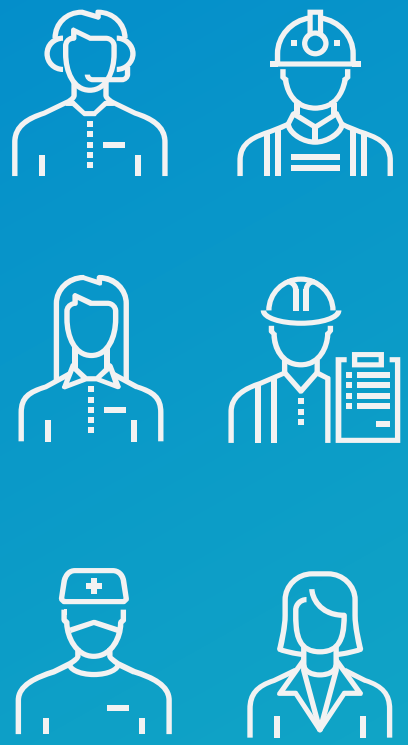
A Successful Application Must Engage & Connect



Engage

Workflows

APIs

Business Process

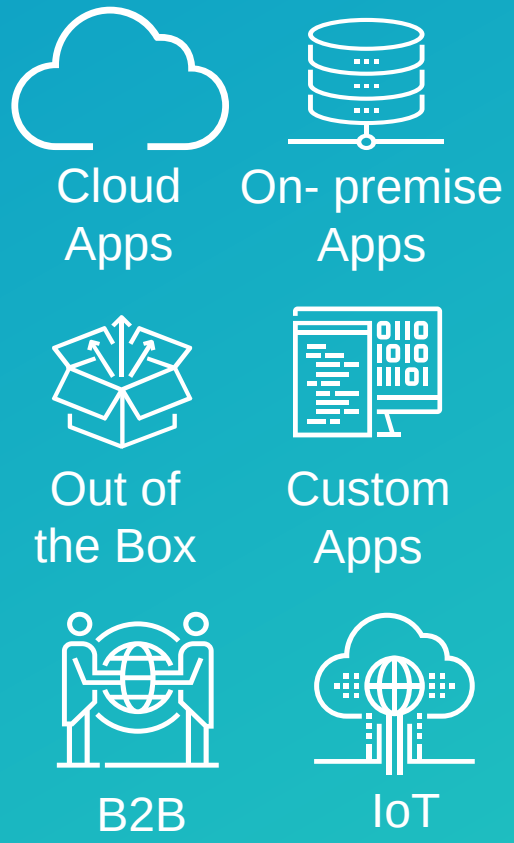
Your Application

Connect

Exchange

Synchronize

Business Data



Connect

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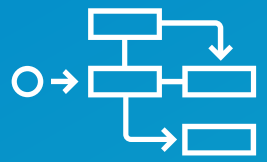
Boomi's Unified Platform:
Solves Your Customer Experience Gap

Orchestrate



Workflow Automation
and App Development

Mediate

API Design and
Management

Engage

Workflows

APIs

Business
Process

Your Application

Connect

Exchange

Synchronize

Business
Data

Integrate

Application and
Data Integration

Consolidate

Master Data Hub

Connect

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Challenge: IT's App Dev Burden

Idea

- Platform
- Wireframe

App Design

- Authentication
- Penetration Testing

Security

Upgrades

- Enhancements
- Exception
- Performance

- Infrastructure
- Prototype
- Testing

Development

Monitoring

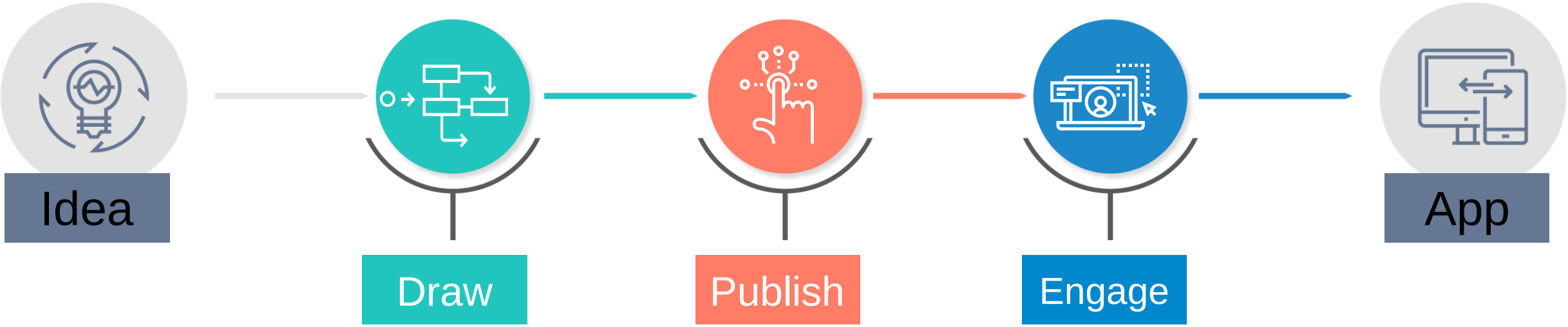
- Auditing
- Logging

Scale Architecture

- Load Balancing
- Distributed

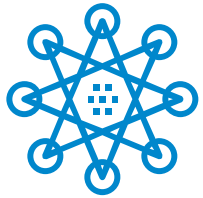
App

What Flow Does: Accelerate App Development with Low-Code



Build Applications, not Infrastructure

Provide Last Mile of Connectivity On the Field

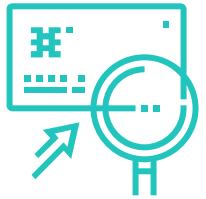


Unlimited Connectivity

- Offline Ready
- Out of Box Mobile Ready
- Connectivity to Any Endpoint

Enterprise Grade

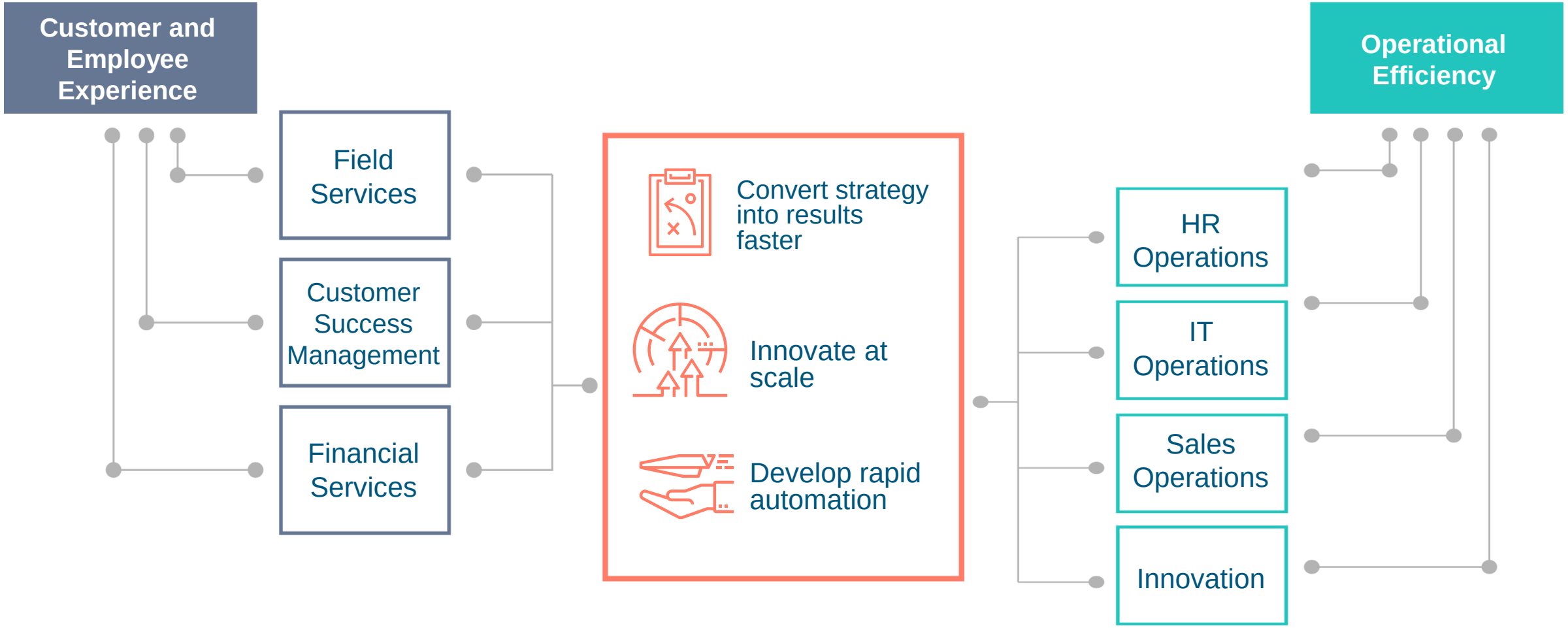
- Deployment Flexibility
- Security
- Scalability



Customizable

- Built with APIs
- Built-in Integrations
- Built-in Performance Dashboards

Empower Your IT and Line of Business Partners



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Digitizing Field Worker Processes; Improving Productivity by 25%

origin

Asset Intensive business over wide geographic area

Occasional Telecom Connectivity

Majority Paper-based processes
- 1700 PDF forms for different work activities

Manual approach results in significantly reduced “tool time”

Data collected in the field needs to be cached and then interfaced in up to 10 systems

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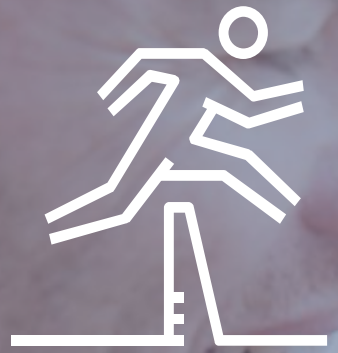
Home Healthcare Organization



- To adhere to HIPAA compliance - patients required a home visit every 4 months for nurses to re-authorize the supply of medical oxygen oftentimes in remote locations (no internet access)

Easier to Use Solution Sought to Adhere to Healthcare Compliance for Medical Supplier

Salesforce | SAP

- Minimum disruption of business continuity
- Simple and easy to use app delivered in 8 weeks, built with standard Flow builder and themes for offline usage
- Front-end app for back-end integration of Salesforce and SAP

Integrate | Hub | Exchange | Mediate | Flow

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Mobile Orders and Approvals

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Mobile Ordering and Approvals

Situation: Sales rep for a multinational beverage company visits with customers and offers samples of the latest seasonal beverages.

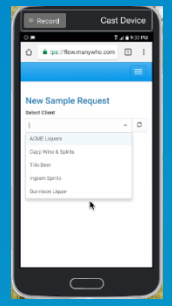
Challenge: Top tiered customers would require larger quantities of beverage samples. With a remote work force approvals can take days.

Specific Solution Capabilities:

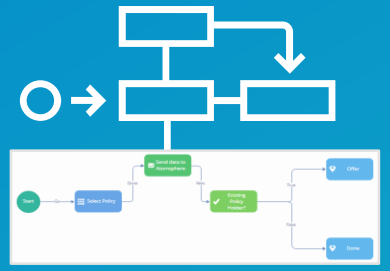
- Show up-to-date product samples from product database
- Deliver standardization and automated escalation around the human portions
- Allow mobile/remote workers to participate in a workflow for real-time resolution

Outcome: Faster turnaround, Fewer disruptions, Improved customer satisfaction

Mobile Beverage Ordering

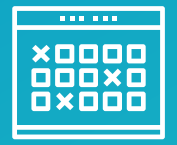


Sales rep selects beverage sample from mobile phone



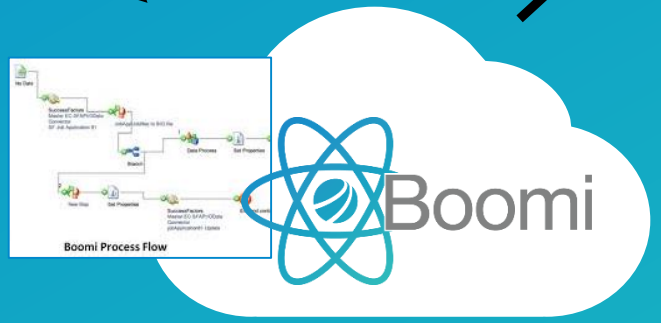
Boomi Flow
Launch Mobile Beverage Ordering Process

Manager receives SMS alert and approves



Samples delivered to a happy customer

Data-repositories of choice!
[PostgreSQL database on AWS in the sample]



Beverage offerings pulled from central database and business rules fired to determine if approval is required

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Sales Chatbot

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Sales Chatbot

Situation: Sales operations team have rolled out a new chatbot to help field employees quickly and easily navigate their CRM.

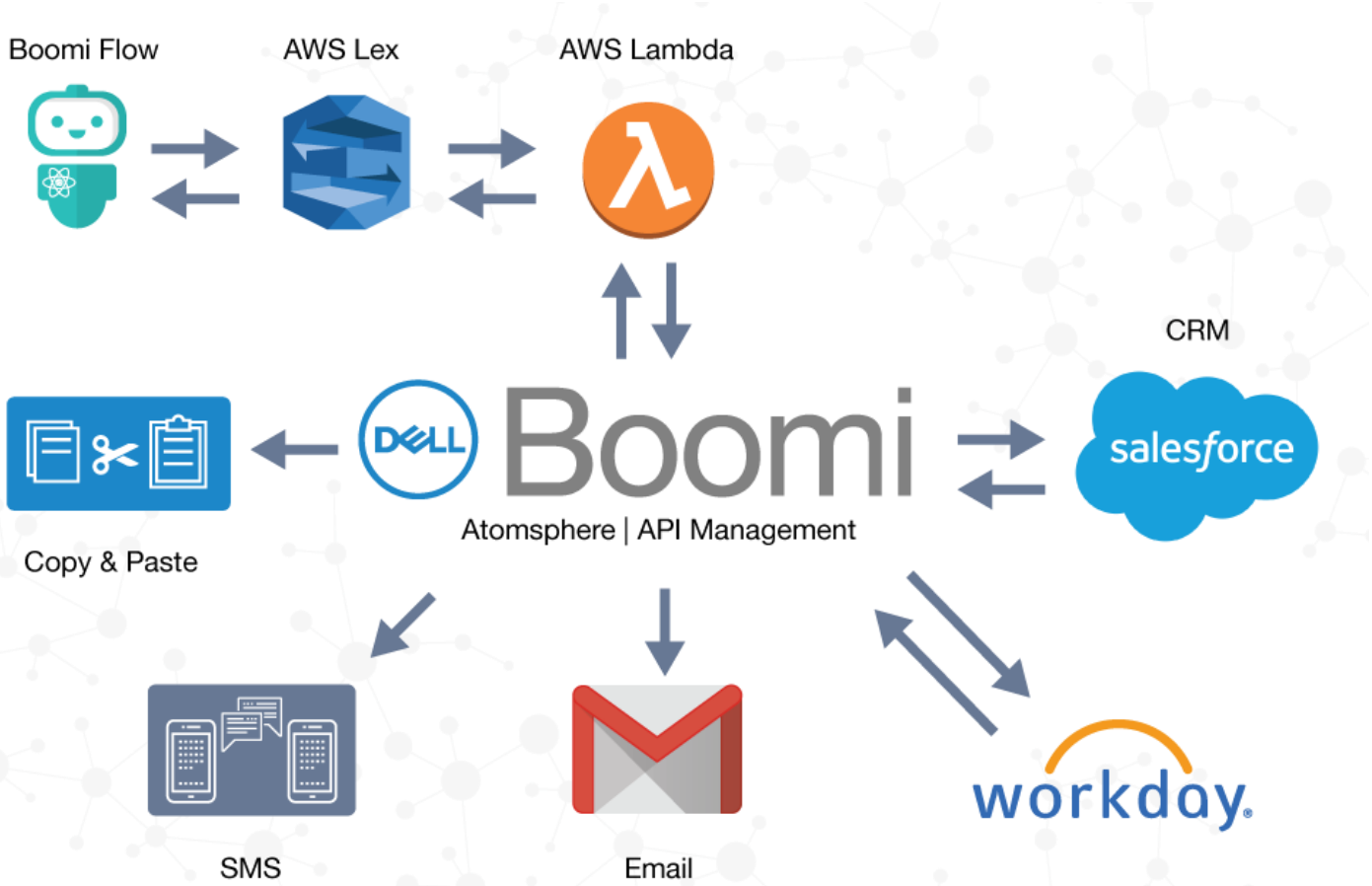
Challenge: Even with the latest in connectivity accessing customer information is very time consuming.

Specific Solution Capabilities:

- Orchestrate requests to API enabled AI tools
- Assistant driven approach to information retrieval
- Integrate to CRM

Outcome: Faster turnaround, Efficient data retrieval, Latest customer information

Building a Chatbot with Boomi



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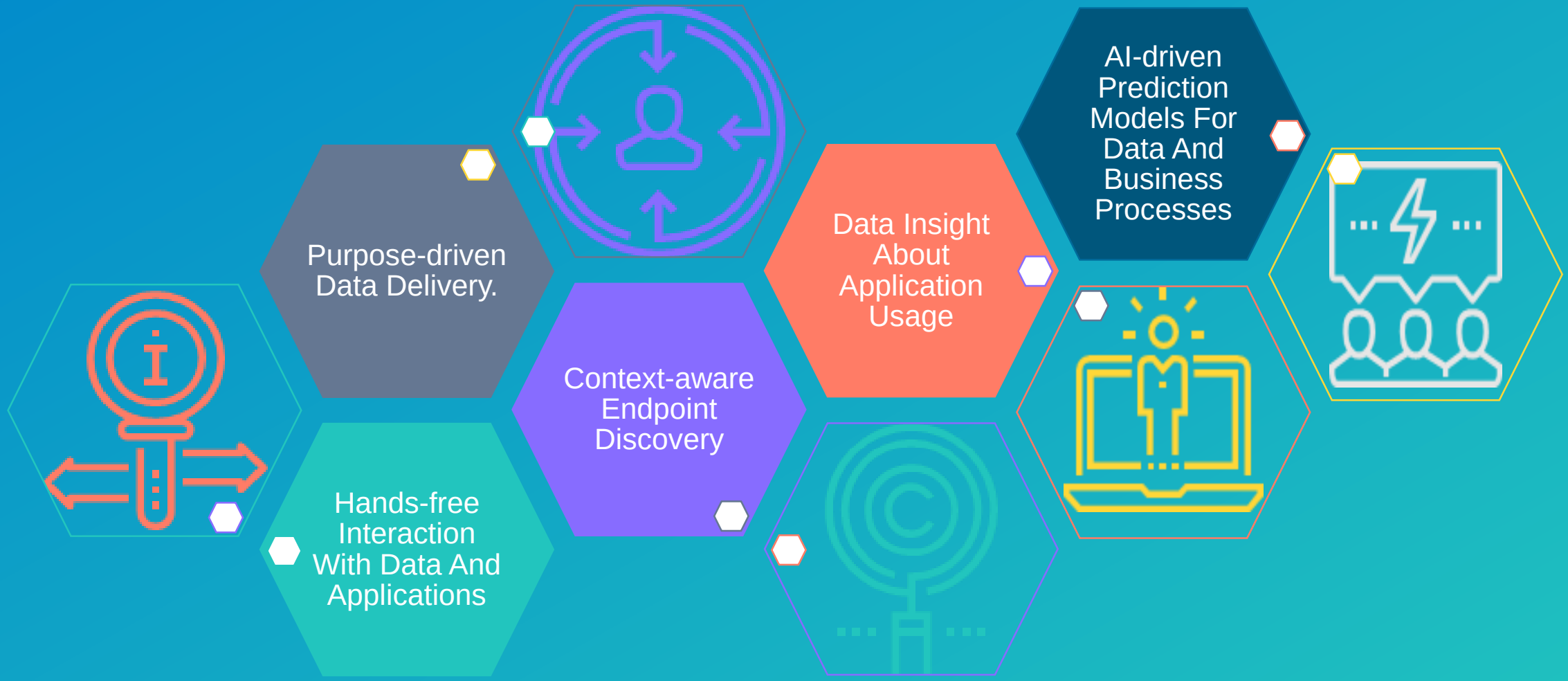
Boomi Advantage



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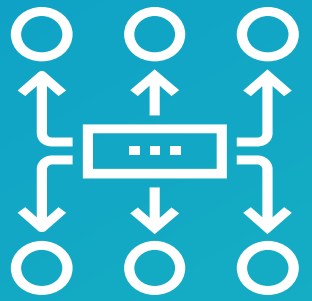
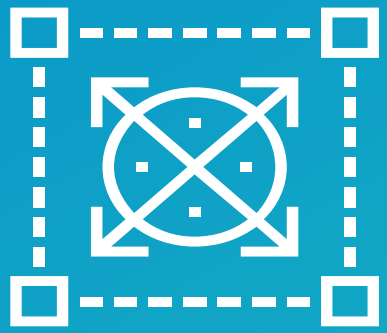
Why Boomi Flow for Meeting Your Field Services Challenges

Mix Of Different Solutions



Quick To Integrate



Extending the Life of Your Current Systems

Two-way Flow Of Information

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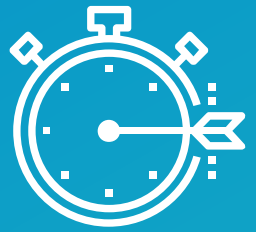
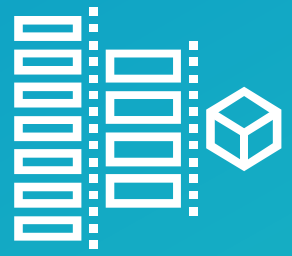
One Platform: Delivering Value Across Your Field Services Needs

Lower TCO



Economies of Skill



Process Efficiency

Faster Time to Value

Ease of Use

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Questions?
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By 2020, 10% of emergency field service work will be both triagd and scheduled by artificial intelligence

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Magic Quadrant for Field Service Management 2017

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By 2020, over 40% of field service work will be performed by technicians who are not employees of the organization that has direct contact with the customer

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By 2020, more than 75% of field service organizations with over 50 users will deploy mobile apps that go beyond simplified data collection and add capabilities that help technicians succeed

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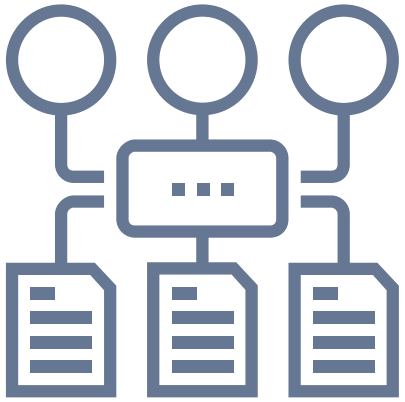
Typical Flow Use Cases

Business Process or Workflow Automation



Process Orchestration

Onboarding

Order Provisioning

Field Service

Site Survey

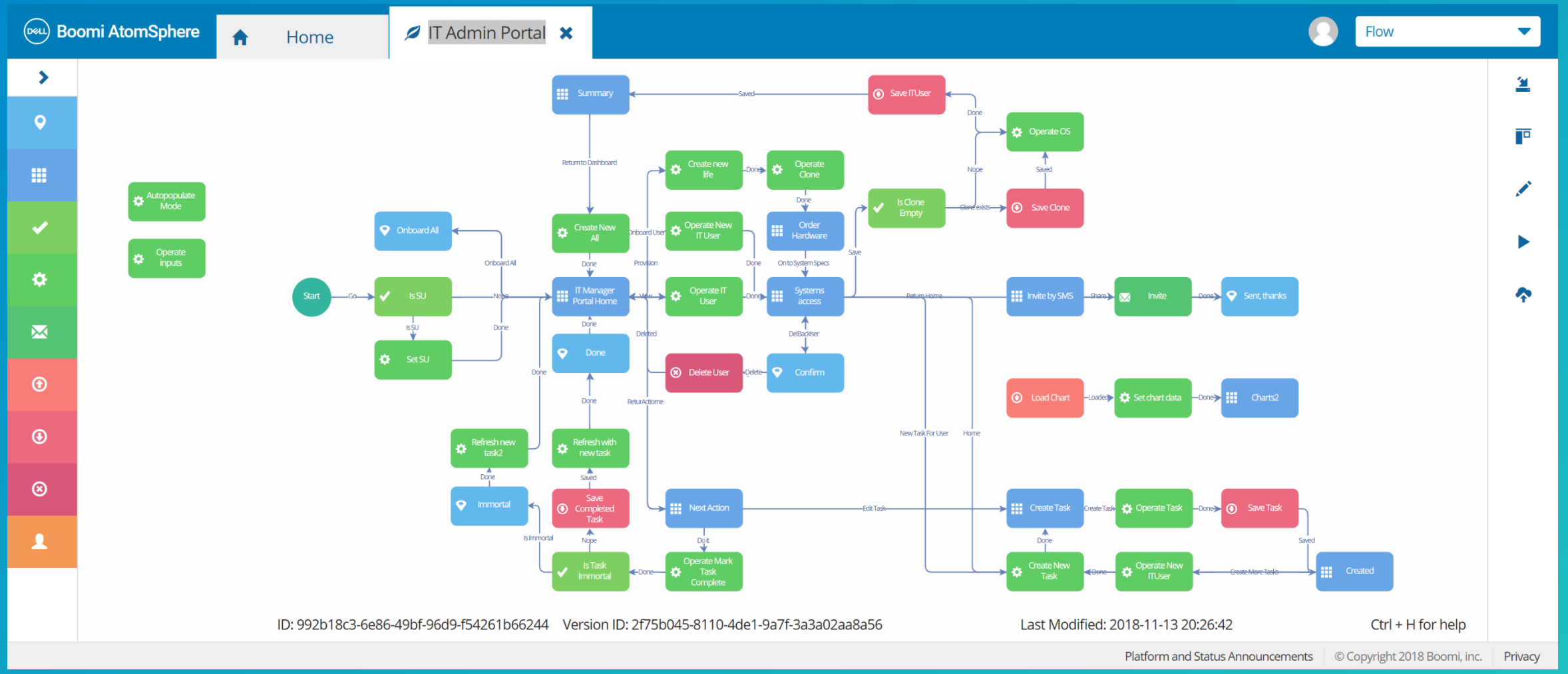
Onsite Guided Instruction
(potentially offline)

Customer Service

Claims support

Agent Scripting

One Platform: To Build Custom Workflows



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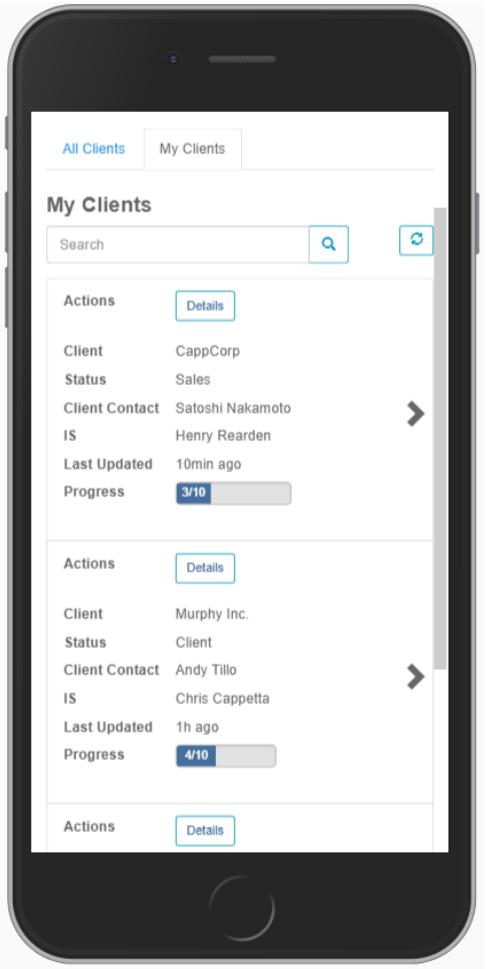
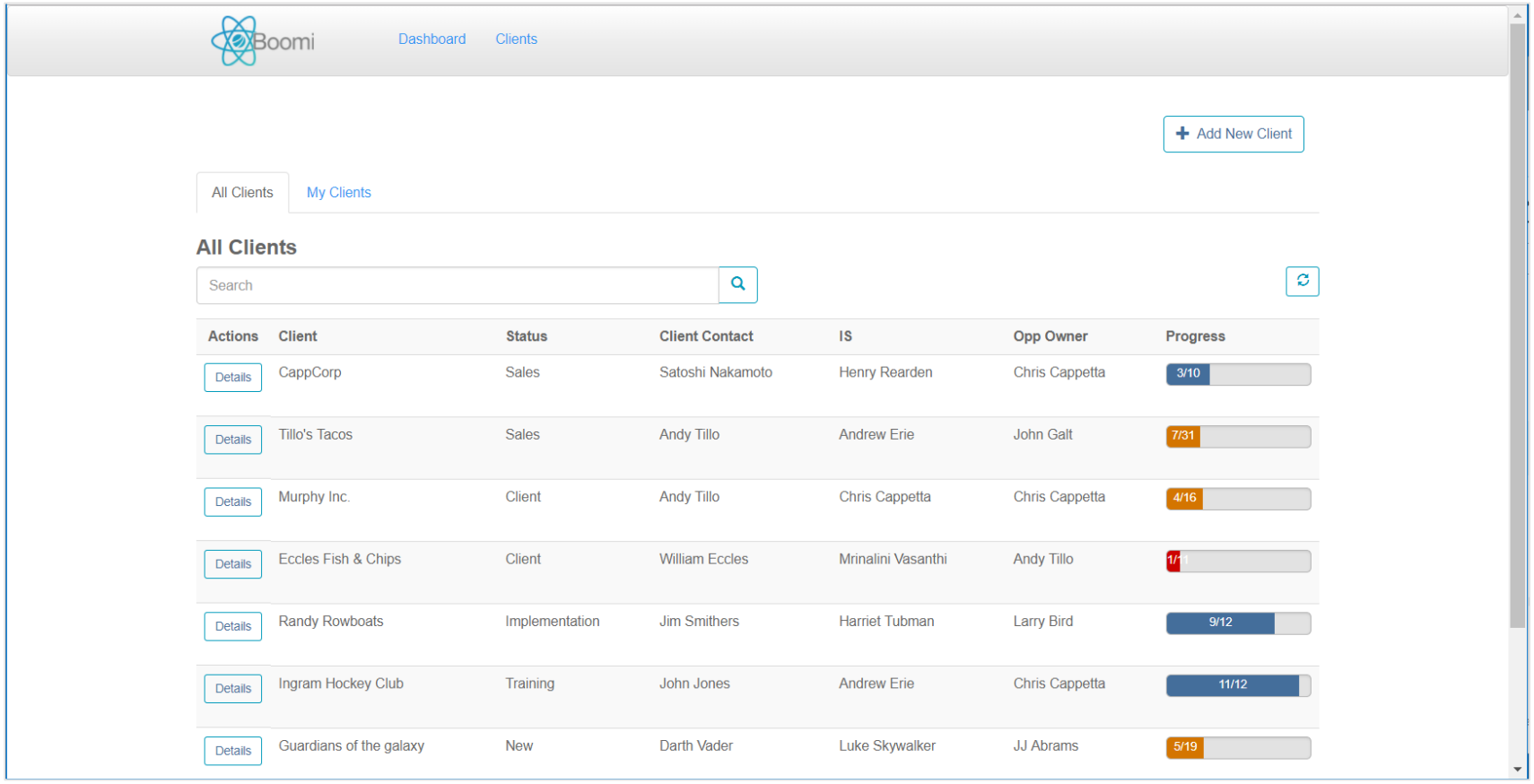
Mobile Friendly Out-of-box





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