SAP Thought Leadership Paper
Customer Relationship Management

Collaborating with Customers to Deliver Win-Win Service Experiences

Differentiate Your Business by Optimizing Your Appointment Booking Process

The Best-Run Businesses Run SAP™

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When service organizations and customers collaborate and negotiate mutually convenient appointment time frames for service, everyone wins. Customers are happy – and this leads to higher customer retention and referrals for your business. Using affordable, high-quality collaboration solutions that have been proven in high-volume service settings at organizations worldwide, you can empower all parties to communicate throughout the service lifecycle.

Appointment Scheduling with Customers

How do you arrive at a win-win situation when it comes to appointment scheduling? That's an essential objective for your service organization. The fact is, today's customers have more power than ever because they can take their business elsewhere – and because of social media outlets that let them easily check out your competition by browsing other customers' comments. And today, one unhappy customer can blog about a poor experience with your company and influence thousands of current and potential customers. When this happens:

- You lose opportunities to cement long-term customer relationships, build repeat business, and strengthen your brand.
- You forego service revenues – a dim prospect especially for businesses with slim profit margins.
- You run the risk of brand damage, which spreads quickly via word of mouth, social media, blogs, and other channels.

By leveraging the latest technologies to optimize scheduling and enable real-time interactions and negotiations with customers, you can turn these conversations into positive experiences that cement relationships and build loyalty.

A TYPICAL SCENARIO

Without the right enabling technologies to support appointment scheduling, customers typically have to deal with a prolonged appointment interaction and negotiation process. The negative customer service experience starts the moment they pick up the phone or schedule service online. It's frustrating. It's disrespectful of their busy lives. And it puts them off.

You know how it goes. Both your service organization and the customer share the same goal: having a service call scheduled and performed successfully. However, each party may define "successfully" differently. The customer prefers to wait for the shortest possible period of time and wants a narrow time slot – for example, 9 a.m. to 12 p.m. The service organization, however, would like to set wider appointment windows for maximum flexibility – for example, 8 a.m. to 4 p.m. However, if the time slot is too wide, the customer may decide to run a few short errands during the appointed time window instead of staying home for the whole period. As a result, your service engineer may arrive when the customer is not at home, which will result in the need for a repeat visit and thus drive up your operational costs.

The Key to Success: Sharing Control

The best outcomes occur when both parties find a way to **share** control during the appointment scheduling process. Each party can consider the other's limitations and avoid negotiation steps that would force the other to an unreasonable commitment. It is not realistic, for example, to expect a service organization to commit to a 10-minute appointment slot. Neither is it fair to expect a customer to stay at home for any number of full days until it becomes convenient for the service organization to show up.

THE FIRST STEP: COLLABORATE WITH CUSTOMERS

What if the organization and the customer could mutually agree upon an appointment slot through collaboration? What if both parties could work together to make sure that each side can meet its commitments, so the mutual goal – successful service execution – can be achieved?

Effective collaboration between service organizations and customers is more likely to lead to successful navigation of uncontrolled, outside forces and events, such as traffic jams that delay a customer – or a service engineer. To some extent, these types of events can be forecasted using historical data and analytics – insights that give you time to take appropriate actions to minimize negative impacts for both parties.

But in other cases, these events can't be predicted. Customers and service providers need a way to collaborate via real-time communication to keep everyone in sync. That's when you need to rely on more sophisticated collaboration technologies.

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Using Collaboration Technologies to Deliver Exceptional Service

Using the latest collaboration technologies, you can empower your service organization and customers to communicate and collaborate throughout the entire service lifecycle – from the initial service center call to the moment the service engineer arrives at the customer's doorstep. Paper-based assignments are a thing of the past. The days when service engineers received set schedules in the morning – with no communication all day – are over.

Today, you can deploy affordable, high-quality solutions that have been proven in day-to-day, high-volume service settings at many organizations across the world. Let's take a look at a few examples.

FIELD SERVICE MANAGEMENT SOFTWARE

Field service management solutions have brought together all the required information and business rules needed to provide higher levels of service delivery and increased customer satisfaction. For example, you can:

- Identify the parts needed for each service task and the skills the field service engineers must have
- Determine how many service engineers are required and if steps are necessary before dispatching a service engineer to the customer's location
- Determine when the service engineers are available – and if contractors are also available, identify when to choose them for a job over an internal resource
- Identify the commitments the service organization must obey, such as those defined in service-level agreements, employment contracts and union rules, and regulatory papers
- Determine the availability of parts and the equipment required for a task

SCHEDULING AUTOMATION AND OPTIMIZATION SOFTWARE

Some people excel at inspired problem solving and creating efficient schedules when given enough time and incentive. But it's impossible to perform this type of work if schedules need to be reviewed and rearranged whenever a request for a new appointment arrives, or whenever a task is started or completed before or after the expected time.

Fortunately, proven service optimization software is now available that can govern the whole process, from appointment booking to scheduling to dispatching and tracking. The software also provides analytics, forecasting, and planning functionality to help schedulers continuously learn and improve. Rather than having to deal with minute-by-minute schedule juggling, they can leverage their broader understanding of the business and eliminate guesswork and inefficiency in service delivery operations. For example, these applications support activities such as:

- **Demand forecasting** – How much work is likely to arrive? When? Where?
- **Capacity planning** – What should the size and skill mix of the workforce be in each location and time frame?
- **Tactical resource planning** – Who will be available (not in training or on vacation) to do the work when it arrives?
- **Rostering** – What is the ideal allocation of resources to shifts to best meet the anticipated workload?
- **Scheduling** – How do we optimally allocate resources to work while considering skills, parts, service-level commitments, location, and customer preferences?
- **Execution** – How do we respond, in real time, to events in the field (such as traffic delays, cancellations, and emergency calls)?
- **Analysis** – How are we performing? Where are the problem areas? What can we do to improve?

MOBILE TECHNOLOGIES

Mobile communications are being used by service workforces to communicate, often in real time, the status of each job and the location of each worker. As a result, companies can have highly accurate estimates regarding the time each service task will start, as well as learn about events that could jeopardize the timely arrival of a service technician. If they learn about events early enough, they can take action to mitigate customer impacts (for example, by reassigning a task to a different engineer already in the area).

MULTICHANNEL COMMUNICATIONS

Today's customers are used to interacting with service organizations via several channels; in fact, they insist on it. In addition to being able to speak to a human, they expect to have access to a friendly and useful Web site. They also want to be able to receive important notifications (such as the technician's pending arrival time) no matter where they are, via their mobile phone by computer-generated speech or text message.

Using the latest collaboration technologies, you can empower your service organization and customers to communicate and collaborate throughout the entire service lifecycle.

Enabling a Whole New Way to Interact with Service Customers

These technology developments enable the creation of new service management processes – and therefore new and better ways of collaborating with customers. To better understand how technology can transform customer interactions around appointment bookings, consider the following example.

Imagine that one of your customers books an appointment – either by talking to an agent at the call center or using a self-service channel (for example, a Web site). You mutually agree on an appointment window that fits your service organization's existing policies: between 8 a.m. and noon. You agree to send the customer an alert 30 minutes before your service representative's actual arrival. The customer will also receive an e-mail repeating the terms of the agreed-upon service – what is to be done and when, and the costs and terms. The e-mail also lists all the different notification methods available to get more information about the appointment or ask for changes. The customer now has at least partial flexibility during the appointment slot and is free for other activities until receiving the alert.

Using field service management software, your company automates and optimizes the service scheduling, handling new events in real time and continuously maintaining the most up-to-date plan for when each service will be performed. Once the start of service is estimated to be within 30 minutes, the software sends an alert to the customer and "locks" the plan for that customer. At this point, only unforeseen events will move the execution time.

At 8 a.m., the customer discovers that her son has missed the school bus and she must drive him to class. Instead of gambling that this might be OK, she uses the Web link you provided via e-mail to alert the service desk that she will be available only after 9 a.m. The software will check whether anything needs to be changed in the plan and, if so, whether the change is possible. Even if the change is not possible, the customer can immediately set a new appointment, saving all parties time and hassle.

More likely, the software will find a way to accommodate the customer's request – which means your service organization avoids a "not-at-home" trip while earning favor with the customer for exceptional responsiveness and flexibility. Even in the worst case, when the service just can't be performed during the promised appointment time, the software will detect this as soon as possible and notify the customer. She won't be happy, but she will at least appreciate the effort to avoid wasting her time, and she'll have the opportunity to reschedule at the earliest mutually agreeable time.

LEARN MORE

The example to the left shows how continuous communication leads to a win-win situation. Even the unpredictable event is managed successfully using a collaborative, technology-driven process.

SAP offers a number of solutions supporting field service. For example, the SAP® Workforce Scheduling and Optimization application by ClickSoftware allows service organizations to collaborate and communicate with their customers at every step of the service lifecycle. At the same time, it enables intelligent decision making across your organization – eliminating guesswork and inefficiency in these processes:

- **Demand forecasting** – How much work is likely to arrive? When? Where?
- **Capacity planning** – What should the size and skill mix of the workforce be in each location and time frame?
- **Tactical resource planning** – Who will be available to do the work when it arrives?
- **Rostering** – What is the ideal allocation of resources to meet anticipated workloads?
- **Scheduling** – How do we optimally allocate resources?
- **Execution** – How do we respond, in real time, to events in the field?
- **Analysis** – How are we performing? Where are the problem areas?

To find out more, visit www.sap.com/solutions/solutionextensions/workforce-scheduling-optimization/index.epx.

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