



# GET FIELD SERVICE RIGHT

# Who is CongruentX & What Makes Us Different?

**CongruentX** is a different kind of consulting firm. We help companies get value from their **CRM investments** so they can **grow**. We do this by focusing on

- **Clients** not **projects**
- **People** not **resources**
- **Outcomes** not **hours**

**Our team** – has run the largest practices in the industry, worked with the most complex solutions, and includes Microsoft MVPs, plus Microsoft Certified Trainers (MCTs).

We work through a **new consulting model** built for client **outcomes** not the consulting companies' **billable hours**



# What We've Heard

The system **doesn't match our processes**

It's **too complicated** for our techs

We are **overly customized** and need a developer to fix everything

We need to best leverage the new **changing features**

We had **no idea what was going** on until something was broken.

Scheduling still **isn't efficient**

It **doesn't integrate well** with our other systems



Our Field Service Partner **didn't understand our business**

We're **not** getting the **insights we need**

Why is everything a **change order for our partner?**

Our Field Service Partner **didn't know the product deeply enough**

# What We Have Learned

Why We Need to Get Field Service Right



## CUSTOMER EXPERIENCE IS CRITICAL

89% of Companies expect customer experience to be their **key differentiator** today



## COMPANIES ARE BUYING LOTS OF CRM

Companies are **investing in Field Service** to help Their frontline workers better service their customers



## THEY ARE STRUGGLING WITH IT

Companies are only satisfied with their Field Service implementations **50% of the time**



## WHY?

The Way We Consume Tech Has Changed  
The Way Field Service is Implemented **Has Not**



# The Way We Consume Information

## At **Work** Needs to Be More Like at **Home**



### @Home

Apple watch automatically tracks my run

Alexa tells me my current, local weather. I press a button on my phone and a ride shows up.

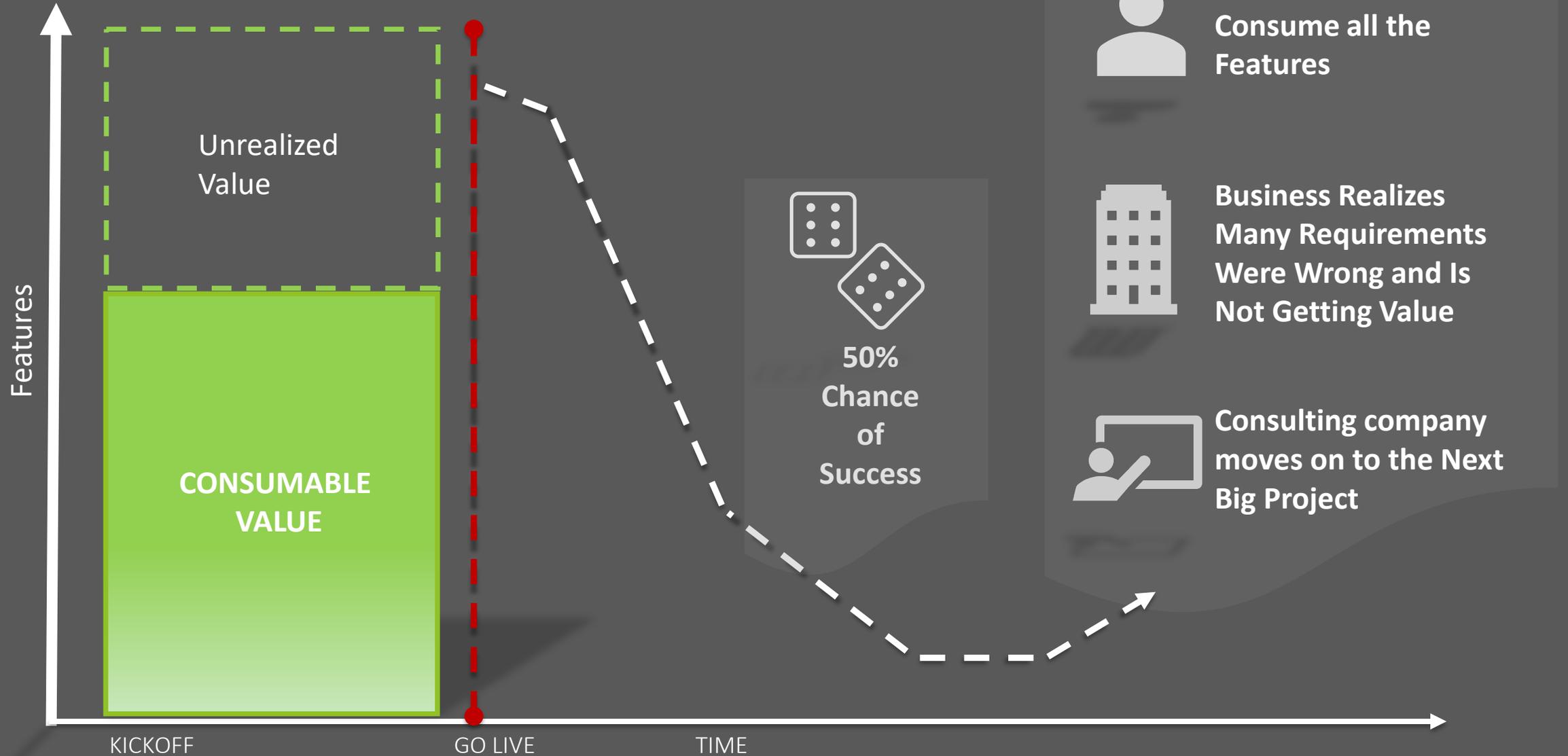
**Data** becomes **insights** – in the **context** of what I'm doing.

### @ Work

I get **disconnected systems** with forms that are way **too long** and live on top of **static data**. I have to hunt for what I need across big forms and multiple systems.

I get **too much content**

# 20-Year-Old Way to Implement Field Service...



# A Fresh Approach – Our Strategy

Get CRM Right

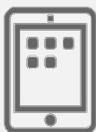


# Metrics that Matter – What You Can Expect

Metric	Improvement
Dispatch Time	30-50% Reduction
First-Time Fix Rate	10-20% Improvement
Customer Satisfaction (CSAT)	10-20% Increase
Travel Time	20-35% Decrease
Jobs Completed per Technician	15-25% Increase

# Get Field Service Right Offering Set

## Foundation 6-week deployment plan



### Base work order management (MVP)

- Define work order types
- Define incident types
- Work order statuses
- Basic work order business process flow
- Work Order/Asset Knowledge base setup



### Best practice screen configuration & design

- Account/Customer 360
- Contact
- Work order
- Customer Asset



### Asset maintenance

- Asset Information – capture critical asset information such as serial number and asset specific properties
- Planned Maintenance – Define asset Preventive Maintenance schedules
- Functional Location – Create a functional location hierarchy to pinpoint an asset's exact location



### Schedule board

- Define 1 schedule boards
- Assign unscheduled Work Orders and track their progress
- Use filters to find the best resource for the job
- Track technician location



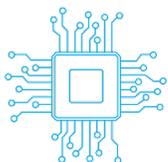
### Resource management

- Load Resources and assign to territories
- Capture address information for scheduling
- Assign Resource Skills, Skill Level, and Roles



### Field service mobile

- Runs on iOS, Windows or Android phones/tablets
- Offline mode for remote or limited network access



### ERP Integration\*

- Synch of Products/Pricing, Invoices and Warehouses/Inventory from F&O / BC
- Synch of Accounts, Work Orders, Inventory Txfrs/Adjustments from D365 CE



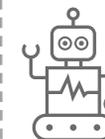
### Power BI quick start\*

- Basic Field Service KPI's such as First Time Fix and Mean Time Between Failure
- Embed within Dynamics 365



### Field Service / Customer portals\*

- Customer Portal to give customers access with a profile
- View Assets, Work Orders, Planned Maintenance Schedules
- Self-Scheduling / Tech Location Tracking



### Autonomous Agents\*

- Smart WO Assignment Agent
- PM Scheduling Agent
- Warranty Claim Agent
- Field Technician Agent
- Upsell / Cross-Sell Agent
- Quality Review Agent
- Parts Replenishment Agent

# How Do I Get Started?

Tactics | How We Do It



HOW DO WE MEET THE BUSINESS GOALS WE NEED TO ACHIEVE?

HOW DO WE GET STARTED WITHOUT A BIG PROJECT?

WE ARE WORRIED ABOUT ADOPTION...

## 5 Week **Get Field Service Right Challenge**

### What to Expect

Bring IT and Business together with fast moving, interactive engagement featuring design thinking discovering **Digital Constraints**. **Art of the Possible** learning on D365 and Copilot AI **Make it Real** with collaborative low code sprints.

### Week 1

Analyze Jobs to Be Done. Discover **digital friction**. Prioritize one with 10X ROI

### Week 5

**Action Plan** to Onboard Adopt and Achieve Outcomes with the Solution

### Week 2 - 4

Rapid, iterative **sprints** to develop low code high value solution with an eye on outcomes

### What You Get

High fidelity prototype **10X** Outcomes Plan Backlog for 3 others Future Blueprint

# Activity Breakdown

WEEK 1	WEEKS 2 - 5			WEEK 6
Discovery, planning & requirements	Work Order & Case Management	Products & Assets	Resource, Mobile, & Scheduling	Demos, Action Plan
<ul style="list-style-type: none"> <li>• Validate Azure Client AD tenant exists</li> <li>• Validate multi factor authentication (MFA)</li> <li>• Validate password policies</li> <li>• Validate licensing provisioning</li> <li>• Confirm number and types of users</li> <li>• Install best practice package</li> <li>• Confirm field service requirements and scope</li> <li>• Identify champion SME's</li> </ul>	<ul style="list-style-type: none"> <li>• Configure and finalize screens</li> <li>• Create case types, incident types, work order types, and define status's</li> <li>• Setup business process flows</li> <li>• Setup planned maintenance schedules</li> <li>• Test</li> </ul>	<ul style="list-style-type: none"> <li>• Load products</li> <li>• Create warehouses</li> <li>• Load/create assets</li> <li>• Define functional location hierarchy</li> <li>• Test</li> </ul>	<ul style="list-style-type: none"> <li>• Load resources</li> <li>• Setup resource territories, skills and roles</li> <li>• Setup schedule board and views</li> <li>• Finalize mobile screens</li> <li>• Test</li> </ul>	<ul style="list-style-type: none"> <li>• Agent, dispatch, technician, SME training</li> <li>• Prioritize &amp; Refine Roadmap</li> <li>• Demos and Feedback</li> <li>• Compare Results</li> <li>• Develop Roadmap</li> </ul>

# What to Expect | The Next 6 weeks



**\*Daily To Do's and Coaching Calls**

# Our Recommendation for You



## GET CRM RIGHT \$99,500 – FIXED FEE

### GET CONGRUENT | ALIGN PEOPLE AND TECH

- Kickoff
- Business Canvas & GTM
- Personas and Responsibilities

### CONDUCT DESIGN THINKING WORKSHOPS

- Determine Digital Constraints Re Achieving GTM Outcomes

### CONDUCT POWER PLATFORM ART OF THE POSSIBLE LABS

- Context driven and featuring CX Studios Library



## WHAT YOU GET

### DISCOVER

3-5 key business processes where digital friction is holding you back

### PRIORITIZE

One high impact issue with a minimum 10X ROI

### MAKE IT REAL

Rapid collaborative sprints to build a high-value low code prototype

### ACTION PLAN

Onboard Adopt and Achieve Outcomes with the Solution

**ROADMAP FOR SUCCESS**  
with Remaining Prioritized Solutions

# READY TO GET FIELD SERVICE RIGHT?

