

SERVICEMAX

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QUICK GUIDE FOR A SUCCESSFUL SOFTWARE IMPLEMENTATION

INTRODUCTION

Many service providers are choosing to add new software applications to stay agile in a competitive market. IT investments yield great digital efficiency and can supercharge operations. Digital transformations can only be achieved with detailed plans of how to implement and integrate the software solutions with current company processes.

Implementing a company-wide software initiative like FieldFX can be a great way for an organization to drive growth and profitability. Implementing software takes time and effort and most importantly cross-functional buy-in from the organization and its people to ensure long term success. Having effective strategies to manage a software implementation process can help companies achieve a faster return on investment.

Define Success

Having a clear vision of what you and your company would like to achieve with the project is very important. Many companies implement FieldFX to optimize their whole Quote-to-Cash process with integrations to many different business applications, such as their ERP. Other companies leverage FieldFX to improve only a piece of their process. FieldFX empowers companies with the flexibility to tailor the solution to best fit the company's needs. It is very important to create goals for the project to match what success looks like for you and your company.

The project MVP, or Minimum Viable Product, should also be well defined at the beginning of the project, including assumptions about custom development and integration efforts. One main goal of every project is to get value out of the product as quickly as possible, which can be accomplished through iterative project phases. The initial MVP should include only those features and functionality required by the business to complete FieldFX business processes, so it is important to stage automation and other complex solutions out in subsequent project phases to shorten the timeline for delivery of the initial project MVP and drive user adoption.

Plan Ahead

The FieldFX Services team advises all customers to thoroughly document current processes and systems in order to create a plan that parallels their desired success. Project teams are also advised to perform data cleansing activities prior to the start of the project to ensure data is ready to use within the system without any duplicate or irrelevant data. When creating a plan for the project, think of it in phases to create a strategy to gain value from the product as quickly as possible. Also, expose project team members to Salesforce concepts early by leveraging <https://trailhead.salesforce.com> to learn or review fundamentals that will be used later in the implementation process.

With the implementation of any new piece of software, it is important to plan for the change to ensure user adoption. Do not make change management an afterthought. After everything is said and done, the implementation process is only successful when people at the company are actually using the product and deriving benefit from it. Many times, people are set in their ways and find it difficult to adapt to change. It is very important for you to aide your users with the tools and knowledge to transition them into using FieldFX. Establishing your change management plan or rollout/training strategy in parallel to the development of the solution is key. We tackle this challenge in a recent webinar: [Managing Digital Transformation in the Field](#).

Assemble the Team

Implementation projects are a team effort to ensure success. It is very important to have dedicated resources to the critical project roles to avoid bottlenecks and delays while keeping the project on track. By no means do each of these roles have to be fulfilled by an individual, some roles can overlap. It is up to you and your team to decide the makeup of the team.

A. Project Champion: This is an executive-level contact that leads the pre-sales effort, steers pilot/MVP definition and holds the customer team accountable to follow through with the implementation.

B. Change Manager/Agent: This person is responsible for ensuring that the field team is properly trained and fully adopts the FieldFX product within the organization, through the delivery of Customer-specific training materials and training delivery.

C. Project Manager: This is the primary contact that will be interacting with the FieldFX Solution Owner, the business user community and the technical community on a daily basis. Like the FieldFX Solution Owner, they are responsible for facilitating discovery, analyzing/estimating requirements, managing the project plan, tracking/executing associated project tasks and providing periodic project status reporting on behalf of the Customer.

D. FieldFX System Administrator: This person (or persons) will maintain the Customer's Force.com org and FieldFX application, assisting with the FieldFX configuration alongside the FieldFX implementation team. Post-implementation, this person is entirely responsible for all future maintenance of the system, all future new configuration, as well as any new reports.

E. Business SMEs: These are the subject matter experts from Operations, Accounting and IT that will work with the FieldFX team to ensure the configuration satisfies business requirements.

Keep it Simple

Wherever possible, try to fit your processes to the software, not the other way around. This can significantly reduce the complexity of the overall solution and help with scope control. Scope control is one of the most critical ways to control the project's complexity and timeline.

Efforts for each project activity is an estimate based on discovery meetings, trying to stick as close to the FieldFX out-of-the-box configuration as possible to avoid custom development efforts. It is common for that scope to increase during the project as business requirements are fully defined and process

automation is evaluated. Weigh all solution options against the original effort estimate, communicate potential overages, and manage those overages with documented Change Orders to preserve the original project budget.

Maintain the Momentum

Along with dedicating people to the roles outlined above, there are some key activities that can ensure the project timeline does not slip, if done consistently:

A. Regular Leadership Meetings: Recognizing the importance of regular leadership meetings is key, as those are meant for all stakeholders to discuss project accomplishments, blockers and risks. Lack of engagement in these meetings, and/or delivery of associated action items, is a big reason we see projects go into 'limbo' and become delayed.

B. Balance non-project related work duties for project team members: This is to ensure project team members are able to contribute to the project as planned. It is common for project roles to be filled by people that already have full-time business roles, like Finance or IT. This often results in project delays since the project activities can take on a lower priority.

C. Celebrate milestones: Projects can be very challenging, so it is important to take time out during the project to acknowledge and celebrate accomplishments you have made as a team along the way.

D. Be nice to people: Everyone is under a lot of pressure during a project, so make an extra effort to establish rules of engagement and practice patience with people. People can't determine 'tone' when reading an email or message, so keep that in mind when communicating electronically. Remember, saying thank you goes a long way!

Our software works harder, so you can work smarter.

Testing, Testing, and More Testing

Testing

Testing the progress that is being made during the project is very important. The more testing users can perform before a solution goes live, the better the overall solution will be since associated defects can be identified and resolved early. Listen to the needs of the user majority who will be actually using the system and solicit their feedback often. For example, User Acceptance Testing (UAT) should not be executed by an all-IT testing team before handing the solution over to the “real” end Users. Establish a sign off process for functionality to keep track of items approved for deployment.

Train the Trainer

Once the implementation is complete and FieldFX is ready to be used in the field, establish internal FieldFX SMEs or “power users” that can be leveraged to provide training to the rest of the organization. This allows training to be more agile, versus a ‘big bang’ training approach. Leverage your FieldFX SMEs during the project to complete UAT and provide feedback. This will drive their engagement and provide additional exposure to the functionality being released.

Complete Mobile Field Operations Management Solutions

The FieldFX product suite is a complete mobile field operations management solution, providing companies in the oilfield, industrial and environmental services industries with the ability to organize and manage jobs, quotes, field tickets, equipment, contracts, price books and labor along with customer-specific electronic forms.



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