How to Choose a
Service and Maintenance Application

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If you're not already using a service and maintenance application, you may be at a critical juncture in your business, when your manual system will no longer support the pace of business. Or you may already have some software support, but you're finding that it no longer fits the size, quantity, or complexity of your current activities. In either case, it's time to find a new service and maintenance application, one that suits your needs for today and will continue to support you through significant future growth.

Before starting the selection process, it's important to understand your needs and the benefits of having a good system. That's why we've created this guide – to provide you with the essential information you need to make the best decision possible. In the following pages, we'll walk you through the steps of getting started, finding a reseller, choosing the right system, and implementing your system.

We at Sage Software look forward to helping you succeed in choosing the best solution for your organization.

Understanding What a Service and Maintenance Application Is

If your company services or maintains equipment – either as a manufacturer or as a reseller – then your day-to-day activities probably include the following:

- Providing product support, service, and maintenance to your customers
- Logging, managing and tracking service jobs
- Scheduling jobs and tracking work in progress
- Maintaining inventory of parts, spares, and kits
- Managing staff and contract labor
- Processing warranty claims and returns authorizations (RAs)
- Monitoring job budgets and profitability
- Accounting and financial reporting

A service and maintenance application is software that helps you do all of the above. A good service and maintenance application saves you time and money by eliminating the need for many of your manual processes. A top-tier application will also empower you to increase your earnings opportunities by providing you with more targeted information, more strategic insight, and more sophistication.

Getting Started

Build the case for a new system

Before you can research products and choose a solution, you'll need to take an important, but sometimes overlooked, step. You'll need to build a business case for your new investment. Although a quick 'gut check' may tell you that you're making the right move, it may not be so obvious to other decision makers in your organization. Start by measuring your current productivity levels and the cost of not making any change at all. It's always helpful to have a "benchmark", especially when you start to think about budgets and ROI. Gather metrics such as predictive error rate, man hours spent on redundant processes, the cost of stocking unused spare parts, and the cost of losing a percentage of your customer base due to poor customer service. Define your goals and objectives and gather some ballpark numbers so that you can communicate to your organization's decision makers the cost, benefits, and potential ROI of your proposal. More than just a formality, the process of building your case will help you define where the problems and opportunities are so that you can be sure that your solution will really address them.

Form a project team

Assemble the team of people who will decide what your company needs from the new system and what functions it must include. Depending on the size of your company, team members may include system users that are on the front line, system managers that oversee staff and reports, system integrators for technical consideration, and those responsible for sign-off. Define each person's role and their level of involvement and decision-making during this process. Clearly define

When Is the Right Time to Move to a New System?

Don't wait until your service operations are no longer competitive to evaluate whether you need a new system. Ask yourself the following questions to determine when it's time to step up your system capabilities.

Is the quality of your customer service in decline?

When your organization gets busier, you have more customers that need your attention, and possibly more services that you're offering. If, as a consequence of the increased activities, orders are getting lost, jobs are going out late, agreements are mishandled, or you're understaffed, then you may need increased automation to help smooth out processes and get on the ball with your customers.

Are you having trouble accessing the information you need to make mission-critical decisions?

Old information tells you what happened yesterday Unfortunately, by the time you get yesterday's news, it's too late to do anything about it. Incomplete, irrelevant, or error- prone information is worse, and could actually cause serious trouble if you act on it. If you feel that you could be more strategic, more profitable, and more competitive if you only had real-time, accurate information, then it's definitely time to look at finding a better software solution for your service organization.

Are you concerned that you're losing money on jobs because of efficiency problems?

If you are busier than ever but finding that your profit margins are going down, then you may have efficiency problems. Under-utilized or double-booked staff, overstocking, delayed response times, or contract errors are just some of the problems you may be experiencing. If so, a robust, automated system can provide new, more sophisticated tools to help your staff be more productive and feel more empowered.

Are you keeping pace with current industry trends?

The availability of new technologies and increased market demands are driving rapid change in many industries. Watch for trends such as rising customer expectations, increased competitive pressure, or dropping profit margins. Introducing new or improved automation technology to your service department can be a powerful tool for increasing competitiveness in a challenging market.

Are you looking for opportunities to outflank the competition?

If you use service management as a competitive differentiator – or if you want to – then you need to make sure you're working with tools that are as good, or better than, your rivals'. The leaders in your industry don't skimp when it comes to their service and maintenance application. A good service and maintenance application can be used competitively to:

- Empower, and therefore retain, higher-quality staff than your competitors
- Improve your reputation with faster customer service
- Leverage the most up-to-date mobile and wireless technology for higher-quality customer interactions
- Be perceived as an industry-leader
- Cut costs with greater overall efficiency and turn profits into greater marketshare

Presenting Your Business Case

Ideally, your business case should achieve two objectives: 1) serve as a reference point for future periodic assessments of the goals you hoped to meet, and 2) make it easy for your company's decision makers to understand the options and support the proposal.

Although your business proposal will need to be tailored to your organization's structure and culture, you may find it helpful to include the following key elements in your presentation:

Introduction – A brief description of the purpose of your proposal.

Assessment – A detailed, careful study of what is working and not working with your system today.

Options – Outline at least three options for resolving the problems. Remember, "not changing anything" is an option and should be explicitly included.

Solution – A point-by-point report of how your proposed solution will fix what's not working, improve on what is working, and add new opportunities for growth.

Preliminary budget and timeline – A rough estimate of costs and a general timeline. Numbers and milestones can be refined later when you've chosen your solution and are ready for final approval and sign-off.

Goals – A quantified, nuts and bolts look at what you expect your solution to accomplish: this is your ROI, and can be one of the most important pieces of your proposal.

Executive Summary – Key points summarized for quick digestion.

each team member's responsibilities so they know up front how much time and effort will be required of them. You may need to restructure work priorities during the selection and implementation phases to make sure your project team has the resources to get the job done.

Evaluate your current system

To get the most out of your new service and maintenance application, you need to do more than simply add technology to your current processes. The more you know about the problems you expect the new system to solve, the more successful your final choice will be. Discuss what modifications need to be made to current system procedures. What works? What doesn't? Consider not only how technology can automate current processes, but also examine other ways they can be improved. Encourage your team members to be candid about what they find frustrating, redundant, or ineffective. Examine how your organization interacts with customers, suppliers, and your organization's departments; look for weaknesses and ways to improve these communications.

Share your expectations

Once you've agreed on the process and the timeline, have your team members share their expectations for the new system. Conduct a session to brainstorm ways the existing system can be improved, including new functions and processes that aren't currently in place.

Agree on your needs

Have team members create a list of key functions they feel the system needs to provide for the company. Then have them prioritize these items as Essential, Greatly Desired, or Would Be Nice. Encourage team members to differentiate between functions they want and functions they definitely need. Achieve a general consensus within the team defining the rank of each function and then combine those items into a prioritized list.

Create your list of required functions

Once you have consensus, refine your mandatory requirements into a formal Required Functions List. Your Required Functions List should be a short, one to two-page prioritized list that includes all your

must-have functions. This list will help you quickly eliminate systems that don't meet your needs. For help compiling your list, see our questionnaire on pages XX–XX.

Consider the benefits of back-office integration

Selecting a service and management application that integrates with your accounting system ensures complete control and flow of information between your back office and the service department. An integrated application can automatically transfer data from your service department to your accounting database, eliminating manual intervention and transcription errors while providing up-to-date job profit and inventory information. Look for a smooth-running service and maintenance application that can easily and reliably interface with your financial data and supply in-depth information across the enterprise.

Don't forget about hard-to-quantify benefits

The right service and management application maximizes the productivity of your staff. It frees them from tedious, time-consuming tasks and allows them to focus energy on providing customer service. With greater, more immediate access to tools and information, your teams can add more value to their customer service – giving your organization the edge on the competition.

Finding a Reseller

Know the benefits of working with a reseller

Before you begin narrowing down your list of potential service and maintenance solutions, it's important to understand the benefits of working with a reseller. A good reseller has knowledge of service and maintenance operations and lots of experience with integrating software for businesses in your industry. A reseller can help you select the right service and maintenance application for your organization, install new networks or hardware, and make sure the system is running by your target date. Ideally, your reseller will be familiar with your accounting system as well and can make sure that it integrates seamlessly with your new service and maintenance system.

A good reseller will:

- Evaluate and suggest the best service and maintenance application for your organization.
- Save your company time and money during system install and subsequent training.
- Help you get the most out of your implementation based on your organization's specific requirements.

Avoid RFPs

Contrary to what your colleagues may tell you, the next step is not to create and send out a Request for Proposal (RFP) to resellers you are considering. Creating an RFP, sending it out, waiting for proposals, and reviewing them can take months. You can achieve the same results in days by asking potential resellers if their system provides the key functions you require. Obviously, if your company requires you to use an RFP, this step is necessary.

Screen potential solutions

E-mail a copy of your Required Functions List to the resellers you are considering so they have time to prepare and can quickly answer your questions. Conduct a phone interview with each reseller to determine how well their solution matches your required functionality. Note whether each feature comes standard with the system, is available as an add-on module for an additional fee, or is not available at all. A good reseller will also need to ask you many questions to determine which solution is the best fit for your company.

When evaluating a reseller, ask yourself these questions:

Can the reseller provide my company with a complete service package?
Critical elements of any software implementation are product training, technical support, future maintenance, and upgrades. Look for a reseller who wants to assist you not only with the immediate sale and installation, but also with long-term training and service.

Does the reseller listen effectively?
This question separates the true solution provider from the product peddler. To make the best recommendations for your organization, a reseller must first learn about

your organization – including your system's current capabilities and those missing (but required) items or functions. A good reseller will attempt to learn as much as possible about your organization, and will speak to more than one person within your company.

Does the reseller communicate clearly?
Be wary of resellers who spend all their time discussing features of a program. Your focus during discussions with a reseller should include the system training and services the reseller can offer in addition to the features and benefits of the service and maintenance software itself.

Can I work with the reseller?
Remember, you'll be working closely with the reseller over a period of days, weeks, maybe even months. It's important to find a reseller you enjoy working with, who is a good fit with your company's philosophy, and whom you feel will provide the necessary expertise and consultation in a professional manner.

Choosing the Right System

In order to narrow the field of software contenders, you'll need to begin examining companies more closely to see how well they meet your needs. Consider the following factors to weed out vendors that won't fit with your long-term strategy.

Interview resellers before the demo

Familiarize yourself with the various service and maintenance solutions available on the market so you can be confident about your top picks when you shortlist the best options for your company. By interviewing as many software resellers as possible in advance, you can avoid wasting time viewing lengthy, irrelevant demonstrations.

Get to know the software manufacturer

Are you familiar with the company that makes the software? Are they a respected name in the software industry? How long have they been in the business? What is their vision for the future – for their products and for the company? These are just some of

Five Important Questions to Ask Before Implementing a New System

When you're in the process of working with your team to assess what is and isn't working with your current system, it's important to ask good, insightful questions. The following five questions will give you a good start.

1. How are inaccuracies negatively impacting your organization?

2. What do you need to accurately log, schedule, and fulfill your service orders?

3. How does your current system integrate with e-business initiatives?

4. What information do you need to make strategic decisions?

5. How fast do you need service department data to be available across the enterprise?

Ten Essential Features to Look for in a Service and Maintenance Application

1. Complete back-office integration with General Ledger, Accounts Receivable, Order Entry, Inventory Control, and Purchase Order modules.

2. Scalability to accommodate future growth.

3. Sophisticated job management tools, including the ability to estimate jobs and compare estimates to actuals.

4. Integration with internet and mobile technologies such as e-mail, text chat, PDAs, and cell phones.

5. Real-time updates to and from the back-office accounting system – as opposed to periodic batch updates.

6. Browser-based, graphic interface that's easy to learn and use.

7. E-commerce capability.

8. Advanced reporting capability.

9. Support for global business, including accommodation for multiple currencies

10. Minimum implementation time.

Seven Questions to Ask Resellers about a New System

Pick the best three systems and ask each reseller to provide the following information.

1. Estimated license cost for implementation.

2. Estimated build-out costs to adapt the system to your requirements.

3. Estimated costs for radio communications and bar-coding equipment and their maintenance.

4. Timeframe and cost for implementation.

5. Annual support and maintenance costs.

6. Training methodology and training costs.

7. A plan for integrating your back-office systems.

the questions about the manufacturer you want to address when evaluating service and maintenance solutions. Clearly, you don't want to work with a "here today, gone tomorrow" organization.

Insist on a user-friendly system

Even with all the functions your service and maintenance system promises to deliver, if it isn't user-friendly, your staff won't be able to maximize the full benefits. Make sure you select a solution that's logical and easy to use. Ask these questions during the interview process:

- Does the system enable users to easily sort and view information, allowing them to know exactly which activities need to be done at all times?
- Does the software use the familiar navigational model of a standard Web browser?
- Is the system accessible via the Web?
- Can the software provide a real-time window into your service operations and access critical data with only a few clicks?

Look for a solution that integrates with your accounting database

Make sure the service and maintenance application you are considering has solid integration with your accounting database so that multiple departments can effectively track jobs at all phases. Instead of manually inputting information to your accounting system, find a service and maintenance application that can automatically update your accounting system with information regarding job completion status, parts inventory, claims in process, and more. By doing so, you'll reduce transcription errors, lower the staffing requirements for data entry, and improve access to up-to-the-minute information throughout your organization.

Ask about the latest technology

In order to stay competitive and efficient, you'll need a system that works with the latest technologies. Ask yourself which technologies are important to your organization. For example, if you use bar code scanners to support your infrastructure, make sure your service and maintenance

applications can work with and leverage that technology. If your workflow relies on devices like PDA's or cell phones, make sure your new system can talk to that technology. A good system will not only integrate with today's technology, but will also be flexible enough to adapt to future technological advances.

Find out costs for extra users and modules

In addition to maintenance, upgrade, and support costs, it is important to consider how much you'll have to pay for additional users. Solutions that include all the modules generally cost less than those that don't, but will often charge a higher cost per number of users. You may also encounter vendors who are relatively inexpensive when it comes to adding seats, but charge significantly more for additional modules. Be sure to ask the reseller what the cost structures are for adding users and modules.

Ensure options for growth

Before you make a purchase, find out if your software vendor has a maintenance program in place that gives you access to frequent updates. A good vendor invests heavily in engineering and develops new product features and enhancements regularly. They stay abreast of new technologies and make sure their customers do, too – particularly those customers with fast-growing businesses. The opportunity to move to a similar, but more powerful, solution provides you greater flexibility as your company grows. Often, software upgrades cost far less than the retail price of the full program. Some vendors even provide upgrades within their support programs. Imagine purchasing a new car a year ago, and then seeing this year's model and wanting some of the new features. You can't have those new features unless you purchase the new model! In contrast, a good software manufacturer will provide product upgrades at reasonable prices or as part of a yearly service agreement.

Inquire about system capacity

What is the maximum number of users allowed to work with a particular application at a given time? What happens if your business needs to add another location and

configure multiple work zones in your existing location? It's important to consider what your organization will need in the future to avoid having to purchase another new system in a short period of time. When selecting a new system, ensure the software has the capacity to grow with you.

Ask about system architecture

Evaluating the architecture of a service and maintenance solution is one step that you can't afford to skip. If you choose a system with weak architecture, you may end up not being able to easily or safely integrate it with your accounting system, modify it to your needs, or take advantage of future technologies. Make sure your system has a stable, strong architecture, and can easily interface with the latest technologies such as Web, text chat, e-mail, fax, phone, PDA, and branch accounting. Also, take the time to find a service and maintenance system that is either written into your financial core modules or has a direct long-standing relationship with your financial modules.

Get powerful reporting

Look for a system with the ability to extract relevant information easily. A good system can provide virtually unlimited reporting capabilities. Ask for samples of reports when evaluating different systems.

Evaluate system security

The degree to which sensitive functions and reports can be protected will affect how the system rates in security. Ideally, you should be able to specify which operations certain users can perform at specific times. A good system can be set up so your staff members only see information relevant to their job function.

Conduct product demonstrations

Before each product demonstration, have your team meet to discuss the perceived strengths and weaknesses of each software solution and areas they think require particular attention. Inform resellers ahead of time the order in which you want the functions demonstrated. It will make the demonstrations easier to assess if they are all presented in the same order. Keep the demonstration focused on the functions your company needs and not on the ones that look impressive on screen. Have your team fill out comment sheets during the interview for use during the final decision process.

Ask questions during the demo

If someone on the team has a question, make sure they ask during the demonstration. It will be easier to get a clear answer if you ask questions when they occur to you, and while the functionality in question is on the screen.

Understand the difference between standard functions and "extras"

Some software vendors provide basic functions but then make you purchase "extras" that come standard in competing solutions. Confirm which functions are included in the core pricing and which must be purchased separately.

Ask about technical support

Your reseller will be a good resource regarding technical questions or other issues that arise. However, you may still need to rely on the software vendor's technical support team as well. Find out the cost for technical support as well as the policies for maintenance, upgrades, and support. Ask your reseller what you can expect in response times to support questions and if there are support packages available for purchase.

Consider implementation time

Look for a complete solution that can be up and running smoothly and rapidly. The less upfront customization your system requires, the more quickly the implementation process can be completed. Ask you reseller how long the implementation will take and what factors may increase or decrease the amount of time needed.

Implementing Your System

You're almost there. You've done your homework, chosen a reseller, and chosen a solution. Now it's time to put your system in place. To ensure a smooth and successful implementation, consider the following guidelines.

How to Prepare for Product Demonstrations

The software demonstration is an excellent time for your team to understand the features and capabilities of a particular solution. Take full advantage of this opportunity by following these guidelines.

Inform software resellers about your specific needs in advance. A software demo is a reseller's opportunity to profile their products and services. By informing them ahead of time about your specific needs, you direct the demonstrator's attention to your interests, not theirs.

Make sure your core team is able to attend the demos. Make it a priority to keep your core team up to date about their appointments. Since each team member has a different area of expertise, it's important for everyone on the team to be at the demonstration in order to get the most out of each demo. Encourage team members to remain in the room through the entire demo; shared concerns can be flagged more effectively if everyone is present to hear questions raised by others on the team.

Plan your questions. Have the core team come up with questions for each product demonstrator. You may also want to plan the sequence in which the questions are asked, to ensure that everyone stays on topic during each demonstration.

Establish a system for scoring each issue addressed by the demonstrator. Keeping tally for individual issues makes the entire scoring process efficient. It prevents situations in which someone from your team forgets how a particular demonstrator addressed an issue. The scores will also come in handy when it's time to decide which of the short-listed solutions is best suited for your organization.

Ask the reseller to follow up on any issues not addressed. The reseller may need to consult with colleagues or the software manufacturer before providing answers to more in-depth questions. Be sure someone on your team follows up on any unanswered questions after the demo.

Suggested Planning Schedule

The following is a simple five-step process to successfully analyzing, selecting, implementing, and using a new service and maintenance application.

Step 1: Pre-planning
This includes a review of your current system's capabilities, strengths, and weaknesses, as well as the initial list of what you want to do with your new system but are unable to do with your current system.

Step 2: Intelligence gathering
Information is critical to sound decision-making. The more you can obtain good information now about the various systems being considered, the more it will help you in the long run.

Step 3: Analysis
Careful review of the information gathered is necessary to make sound decisions. Please note that this step may include actual system demonstrations, visiting organizations with the service and maintenance application already installed, and perhaps even a visit to the vendor's headquarters.

Step 4: Implementation
Once a service and maintenance application has been chosen, implementation should begin. This may last weeks or months, and can include data conversion, user training, and other elements.

Step 5: Post-implementation review
This step includes the ongoing monitoring and review of the system. Is it performing as expected? What elements need to be modified, changed, or customized? What optional elements can be added to further enhance system performance?

Start with a plan
Begin the implementation process by laying out the goals of the project. This helps keep every team member focused. An installation for an off-the-shelf package requiring minimal customization usually takes between one to three months. If you have numerous goals to achieve, plan on a longer implementation with more consulting resources.

Revisit your timeline
Make sure your implementation timeline is realistic. Your reseller will propose a timeline with deadlines they feel confident they can either meet or beat. Find out what you need to do and which individuals need to be available to help with the process.

Remember: time is money
Your reseller will probably give you a range of hours each task will take. The general rule is: the more resources you allocate for implementation, the less it will cost you in time and money. The reverse is also true. If you aren't able to give your reseller the time and resources requested, the process is going to take longer and cost more.

Provide ongoing training
If you want your service operations to reach their full potential, maintain constant vigilance over your system. Ideally, the training on your system should never end. Promotions, new hires, and the start of every quarter introduce new opportunities for training. Develop a training agenda focused on continuous learning, along with supporting materials, such as written tests and training guides. These tools will enable you to reinforce existing methods and procedures, teach new hires, and ensure that you're optimizing the efficiency of the people in your organization.

Integrate the back office
Direct your efforts toward integrating your new service and maintenance application with your back-office accounting data. Most companies want the ability to push transaction data from the service department to their accounting database and vice versa. You will need to have this essential piece completed and tested before launching the service and maintenance system.

Decide when to make system modifications.
It's usually best to fine-tune your solution with system modifications before you start training your staff. However, if there's resistance to the new software, beware of trying to smooth the transition by modifying the software to work the "old way." Instead, wait until you and your staff are familiar with the new system before reverting to old usage patterns. Also, know that a good system should by easy to customize at all times, so that as your business grows or processes change, your service and maintenance application can evolve along with it.

Schedule a good rollout time
Find an appropriate time to roll out your new system. It's difficult to schedule a perfect time to do this, but at the very least plan to install the system during your organization's slowest time of year, to minimize business interruptions.

Measure against the old system
The success of your service and maintenance system in part depends on the goals you have established for your operation. Once your system is up and running, be sure to benchmark it carefully and compare the results to your pre-system benchmarks. You'll collect vital information to help calculate your return on investment. The benchmark also sets a standard for your team to beat. With ongoing benchmarks, you can put measurable employee incentives in place, compare your results to industry averages, and set targets for coming years.

Service and Maintenance Application Requirements Checklist

Overview

If you provide services on equipment, or sell equipment with service contracts or site agreements, then you need a system to organize your day-to-day service operations, keep track of accounting, and maintain records. The questions below will help you create an inventory of all the activities you do that could potentially be automated and made easier with the right service and maintenance application. When you've finished answering these questions, you'll have a detailed inventory of what kinds of processes are most relevant to your organization. You'll then be able to assess which service and maintenance applications might fit the bill.

Jobs	
☐ Do you create jobs?	☐ Do you return equipment to inventory from jobs?
☐ If so, do you create a job from a template or do you create it from scratch?	☐ Do you transfer equipment between jobs?
☐ Do you perform recurring jobs?	☐ Do you require a return authorization process for warranty equipment to be collected from customers and returned to manufacturers?
☐ Do you generate quotes?	
☐ Do you sell goods?	
☐ Do you link jobs to projects?	☐ Do you track your shipments for return authorizations?
☐ Do you track phases in jobs?	
☐ Do you use sub contractors?	☐ Do you provide loan equipment?
☐ Do you track serial numbers for items sold?	☐ Do you record fault codes and descriptions on the job?
☐ Do you track serial numbers for parts used?	
☐ Do you allocate labor to jobs?	☐ Do you want access to the fault knowledge base from the job?
☐ Do you allocate employees to jobs and track their performance?	☐ Do you prioritize your jobs?
☐ Do you allocate spares to jobs?	☐ Do you allocate a job status to each job?
☐ Do you allocate miscellaneous charges to jobs?	☐ Do you need to be able to create jobs from previous jobs, quotes or templates?
☐ Do you issue spares or parts to jobs?	☐ Do you notify your employee by e-mail about outstanding jobs?
☐ Do you have multiple price lists?	
☐ Do you do standard jobs that can be based on templates?	☐ Do you want to graphically view job and employee schedules together with resource loading information?
☐ Are purchase orders or requisitions raised against specific jobs?	☐ Do you track estimated against actuals for quantities, costs and revenue?
☐ Do you track items outstanding on purchase orders per job?	☐ What forms do you need to print, i.e., invoice, credit note, picking slip, job card, confirmations, quotes, etc.?

Five Common Mistakes People Make When Choosing a Service and Maintenance Application

Mistake #1: Not doing enough homework.

Analyzing and then selecting a service and maintenance application takes time and effort. Information is critical to selecting the most appropriate system for your organization. By reading this booklet, you're already a step ahead of most people.

Mistake #2: Misunderstanding the benefits of automation.

Automating service operations and related functions can save your organization considerable time and money. However, if you don't also improve your current core processes, automating your system won't deliver the full return on investment you require.

Mistake #3: Ignoring hard-to-quantify benefits.

It is difficult to calculate possible future gains such as increased productivity, better efficiency, improved customer service and other hard-to-quantify benefits after a new system has been successfully implemented. Remember, these kinds of benefits can dramatically improve your bottom line and should not be overlooked.

Mistake #4: Passing the buck.

Top management and other key personnel within the organization must be involved in the selection and the implementation process. For the project to be a success, management needs to stay involved.

Mistake #5: Underestimating the ramp-up and debug phase of a project.

Many companies assume a well-designed system will operate at peak levels shortly after they make the purchase. The best system will not perform as expected until properly trained personnel have developed complete competency with the system. Allow users to gain confidence through a gradual process of operational ramp-up, including incremental training and system usage. Wait to introduce users to new and more complex system functions until they have mastered the basics.

Equipment

- ☐ Do you have standard equipment models?
- ☐ Do you need to easily see the link between pieces of equipment, their respective models, and the corresponding manufacturers?
- ☐ Does each model have a warranty period?
- ☐ Does each model need a different response time?
- ☐ Do you track planned maintenance?
- ☐ Do you use meters?
- ☐ Do you create meter agreements – that is, contracts based on meter readings?
- ☐ Do any of your equipment models have multiple meters applied to them?

- ☐ Do you use meter readings for maintenance purposes?
- ☐ Do you use meter readings for billing purposes?
- ☐ Do you track accessories?
- ☐ Do you use master and component relationships?
- ☐ Do you track serial numbers for your equipment?
- ☐ Do you need to track all the information related to the useful life of the equipment you service, including costs, revenue, repair history, meter readings, customer notes, and more?
- ☐ Do you track information such as in-service date, current status, and "on agreement"?

- ☐ On meters, how often do you take readings?
- ☐ Do you create schedules for planned maintenance?
- ☐ Do you have multiple planned maintenance tasks in a single schedule – for instance, one set of tasks for a 5,000-mile service and another set for a 10,000-mile service?
- ☐ Are your service intervals based on meter readings or other measurements, such as "time since last service"?
- ☐ Do you set response times on equipment to be serviced?
- ☐ Do you create miscellaneous equipment when serial numbers are not known?

Employees

- ☐ Do you link employees to work groups?
- ☐ Do you track cost and billing rates?
- ☐ Do you track employee skills?
- ☐ Do you pay commissions to employees?

- ☐ Do you use different billings rates for different equipment, customers, or types of work done? For example, you may base your rates on employee, model, or customer, or another factor.
- ☐ Do you track actual time against estimated time?

- ☐ Do you track response times?
- ☐ Do you track both billable and non-billable time?
- ☐ Do you track employee performance?
- ☐ Do you process employee timesheets?

Fault Analyzer

- ☐ Do you require a knowledge base for faults, symptoms, and solutions?
- ☐ Do you track Standard Industry Codes (SIC) codes?

- ☐ Do you track skill levels required to repair a fault?
- ☐ Do you use a template for repetitive repairs?
- ☐ Do you have multiple solutions for a single fault?

- ☐ Do you attach documents, drawings, or URLs to solutions?
- ☐ Do you set response times for specific symptoms?

Agreements

- ☐ Do you have multiple agreements per customer?
- ☐ Do you have multiple sites per agreement?
- ☐ What types of items do you cover in the agreements, i.e., labor, spares, subcontractors, and miscellaneous?
- ☐ Do you track an agreement status?
- ☐ Do you define the period of cover?

- ☐ Do you define the percentage covered for these items?
- ☐ Do you track the review date?
- ☐ Do you want to be warned when the costs near the revenue earned for the sale of the agreement?
- ☐ Do you track and provide usage on agreements, i.e., hours of labor, number of incidents, etc.?

- ☐ Do you want access to revenue and cost information as well as detailed transactions for the life of the agreement?
- ☐ Do you set response times against your agreement types?
- ☐ Do you schedule your agreement billing?

Site Agreements

- ☐ Do you provide site equipment/maintenance agreements?
- ☐ Do you bill for these on a recurring basis, i.e., monthly, quarterly, or annually?

- ☐ Do you need the invoices automatically generated according to the billing frequency?
- ☐ Do you need to track which equipment is included in the agreement?

- ☐ Do you need to allow for situations where equipment may span across multiple sites?
- ☐ Do you amortize the revenue over the period of the agreement?

Warranty Agreements

- ☐ Are you a service agent for any equipment?
- ☐ Do you track third party or in-house warranty agreements?
- ☐ Do you provide warranty repair services on equipment?

- ☐ Do you have a warranty agreement with the product supplier?
- ☐ Do you provide the services on any product from the supplier or only on certain models?
- ☐ Does the agreement cover labor, spares, subcontractors and miscellaneous items?

- ☐ Do you require your claims to be automated by the system?
- ☐ Do you base your claims on the cost of the service, or on another usear-defined value?

Meter Agreements

☐ Do you have agreements for meter-based equipment? ☐ Do you invoice based on these meter readings? ☐ Does the agreement cover labor, spares, subcontractors and miscellaneous items?	☐ Do you have multi-level billing structures? For example, you may have different prices for different volume tiers: one price for meter readings up to 5,000 and another price for meter readings from 5,001-10,000. ☐ Do you need to be able to define the formulas for these calculations?	☐ Do you have more than one billing formula per agreement? For example, you may have one formula that charges by the copy and another formula that adds on a monthly service fee. ☐ Do you require a meter reading notification function that ensures that all meter readings are concluded and entered?

Return Authorization

☐ Do you need to manage return authorizations (RAs)? ☐ Do you use RAs for both customers and suppliers? ☐ Do you need to track loan equipment? ☐ Do various stages in the RA process need to be tracked, such as 'expected', 'received', and 'returned'?	☐ Do you return multiple items per RA? ☐ Do you return items of inventory? ☐ Do you track accessories that are returned? ☐ Do you use multiple shipments?	☐ Do you use multiple shipping methods? ☐ Do you provide equipment rotation and exchange? ☐ Do you service equipment you have not sold and need a way to quickly add this equipment to your system?

Management Information

☐ Do you require any specific reports? ☐ Do you need to analyze information?	☐ Do you keep extended history? ☐ Do you have any specific reporting tools in use?	☐ What management information do you require daily, weekly, monthly, and annually?

Service Centers

☐ Do you have a head office with networked branches? ☐ Do you need branches to see their jobs only?	☐ Would you like to have the head office see all sites?	☐ Do you need to be able to assign technicians to any branch?

PDA/Cell Phone Technology

☐ Do you currently use mobile technology? Do you require field engineers with mobile offline and online connection?	☐ Is PDA/cell phone technology something you could use in the future?	☐ Do you send technicians to remote sites?

Accountant and general Ledger integration

☐ Do you need your service and maintenance solution to integrate with your GL, AR, PO, IC, OE, and SN systems? ☐ Do you want to track costs, revenue, and profits on jobs and projects?	☐ How many levels do you use in your account structure? ☐ At what level/s in a job do you need to override an account segment? ☐ Do you track work in progress?	☐ Do you track billings and revenue separately? ☐ When or how do you recognize revenue and costs? ☐ Do you calculate burden and overhead allocations?

Information Gathering

☐ Do you need any specific information tracked in the system using custom fields? ☐ Do you need to keep notes and stamp them with the time they were written?	☐ Do you require a function that triggers you to follow-up with a customer or job? ☐ Do your customers have multiple sites? ☐ Do you need your software to track documents, drawings, URLs, manuals, or e-mails?	☐ Do you require user-defined numbering of documents, contracts, projects, and jobs? ☐ Do you want to keep history and statistics for extended periods?

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