



## NAVIGATING FIELD SERVICE MANAGEMENT FOR UTILITIES

ClickSoftware, a field service management (FSM) solution, was the No. 1 choice for utilities as well as non-utilities enterprises for more than a decade. So reliant were companies that they designed critical components of their ecosystem around it - end-to-end schedule, execution and closure processes using ClickSoftware suite of products.

But after the acquisition of ClickSoftware by Salesforce, companies face uncertainties over support for older versions, including Field Service Edge solution (the SaaS model of ClickSoftware). Utilities need to devise a plan for field service management.

Version	End of life status
Click 8.1	Out of support
Click 8.2	Out of support
Click 8.3	Extended support till December 2023
Field Service Edge	Improvements cease from December 2023, sale of license has been stopped

Enterprises using any 8.x version, apart from 8.3, are in the high-risk zone. Others using version 8.3 may be relatively safe, but cannot be complacent. Moreover, they have to factor in the additional OPEX budget needed for extended support.

Enterprises using Field Service Edge

(FSE), or are in the process of implementing a large FSE installation, will face similar challenges in the future, as no further improvements are planned on this platform.

With rising customer expectations, enterprises cannot afford to wait for a couple of years, before they act.

## The options

Based on our experience, utilities can choose one of three possible options:



Custom solution

**Custom solution:** This option is the most suitable as it enables the enterprise to tailor solutions based on their business processes. A large US East Coast-based water utility is developing such a custom solution as a replacement for their ClickSoftware landscape. Until recently,



Migrate to Field Service Lightning (FSL)

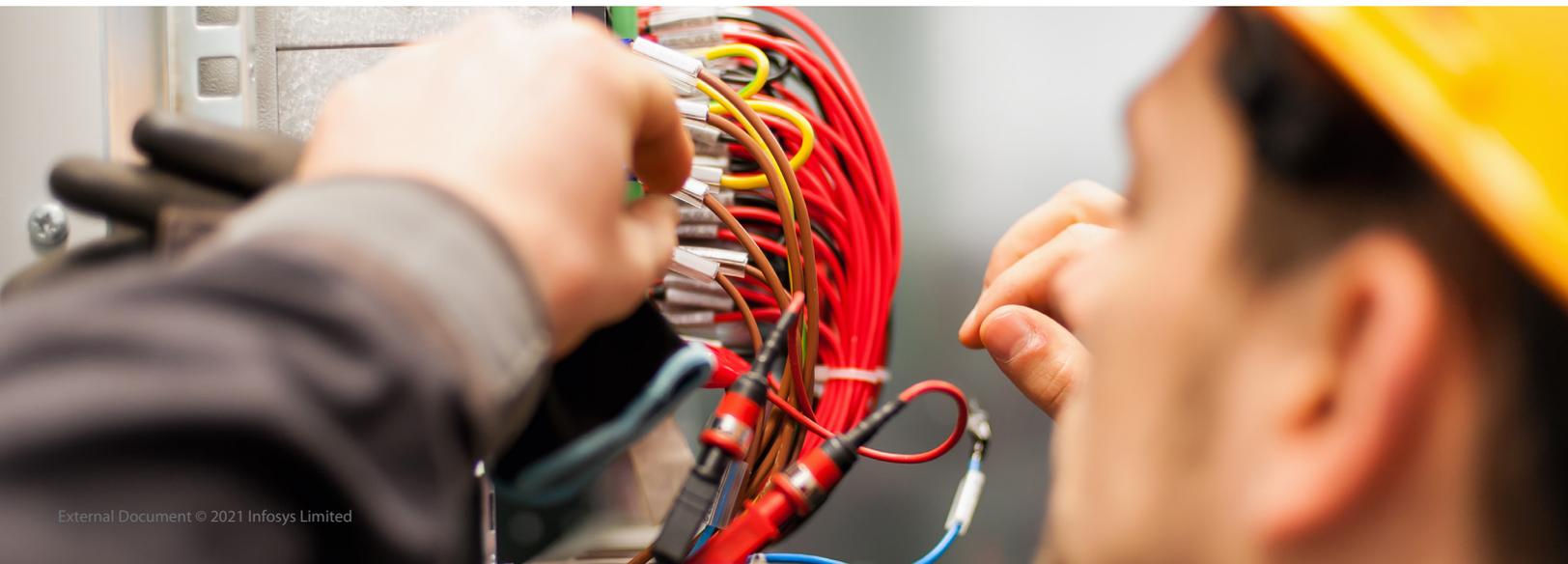
such an approach would have been inadvisable, but now with the availability of low code and no code platforms and cloud technologies, it is a feasible option.

Enterprises avoid this approach due to high maintenance and continuous improvement



Alternative FSM solution

processes that field service needs. But with the emergence of no code platforms such as Nintex, Microsoft Power Apps, Appian, there is a shift in adoption. The field force is one of the key go-to-market focus areas for these no-code vendors, and many of them are building business-specific use cases.



## Custom solution: pros and cons

Positives	Negatives
<ul style="list-style-type: none"><li>• Custom solutions can be easily adapted to specific business needs</li><li>• Custom solutions built on no-code platforms can be hosted on any of the popular cloud platforms, meeting the needs of an enterprise to host applications on the cloud</li><li>• Lower cost if scope is managed properly</li></ul>	<ul style="list-style-type: none"><li>• Higher maintenance cost in terms of maintaining a team to define and implement the application road map</li><li>• Easier customization may lead to deviation from industry best practices</li><li>• If not managed, can become complex and cumbersome with disjointed processes</li></ul>

This option is suitable for:

- Enterprises with a small workforce, or contractor companies serving a utility or telecom with field resources of 200 to 400 people
- Complex and unique scheduling processes which standard products are not able to satisfy
- Enterprises with lower integration complexity
- Enterprises willing to invest in a product development group



## Migrate to FSL

This option is logical as it is based on the ClickSoftware-Salesforce road map. However, this is not a simple process. In fact, it may be as big a project as the original implementation if not planned properly.

The entire migration logically can be divided into multiple logical stages. Each stage, based on the scale of the original implementation, may have varying degrees of complexity. Infosys recommends that each phase should be deployed simultaneously to ensure a timely migration process.

### *Components that can be migrated as is*

These components normally remain unchanged during the implementation process. They are taken from the source system and migrated or uploaded into the target system.

- Master data, look up or reference data, drop down values such as skills, task types
- User data such as scheduler, dispatchers, field supervisors and field users
- Hierarchy data which typically remains unchanged
- Rules and objectives used for scheduling and dispatching

*Components after fit-gap analysis can be adjusted to FSL functionalities*

The length of this stage depends on the scale of the legacy implementation. Understanding of FSL data and object structure is critical for this phase.

- Tasks and their mapping / grouping to work order and work order line item in FSL
- Translation of assignments into service assignments in FSL for both scheduled as well as unscheduled tasks
- Translation of user roles into Profiles and permission sets in FSL
- Field level security and permission sets in FSL
- Retrofit apps such as timesheet, supervisor app may need new Lightning Apps
- Translation of generic events into process flows or trigger items in FSL
- Re-design custom objects and schema needed in Object Manager and page layouts in FSL

Note: The list can increase, and grow substantially depending on the previous implementation.

### *Components which are not available in FSL*

FSL, being a new solution, may not match up in capabilities to your ClickSoftware implementation. There may be many functionalities and business processes which you may have customized in the ClickSoftware application, which may not be directly mapped to FSL functionality.

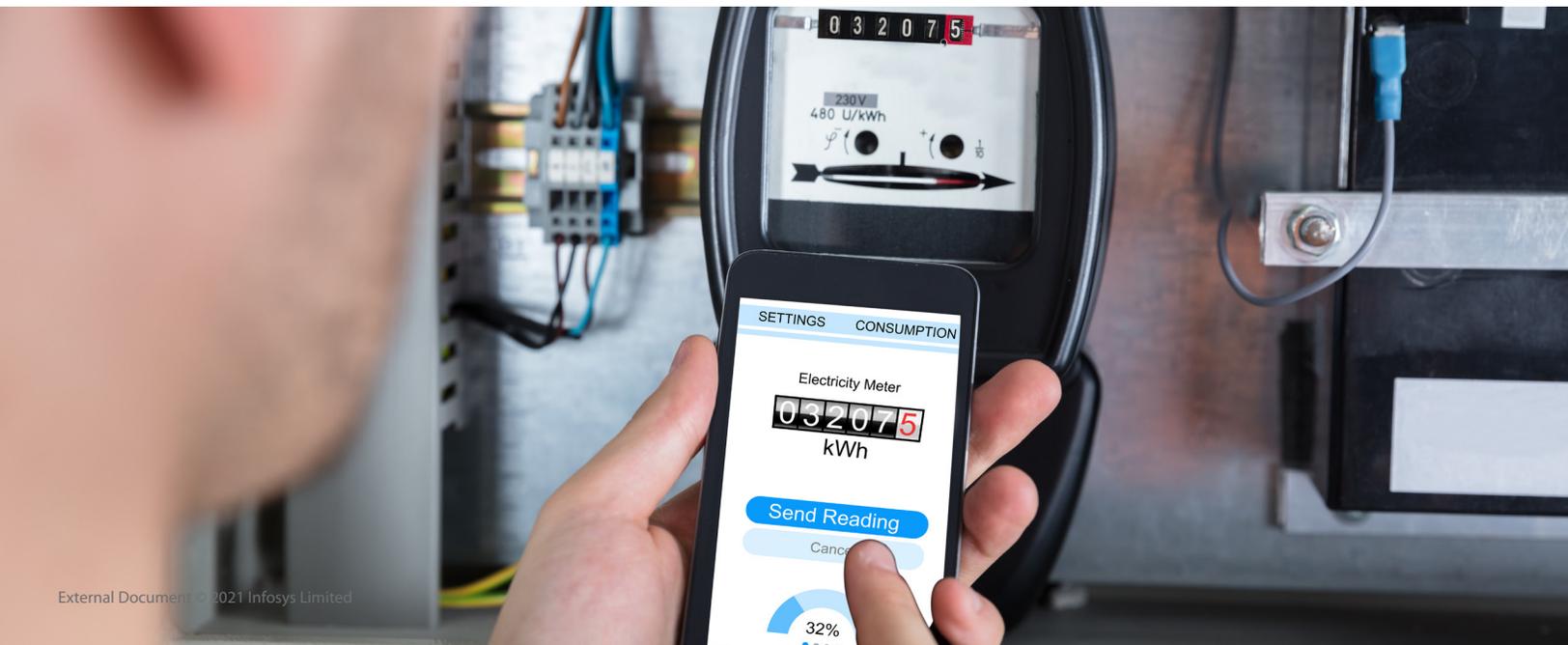
It is important for the architecture group to have an established approach for these features as an overall guiding principle for the implementation.

- Consult with Salesforce road map on availability or plan for such features
- Establish a MoSCoW framework to categorize requirements and process as 'must have' or 'could have' features
- Customize the solution based on the guiding principles and future requirements of the enterprise
- Tweak the existing processes based on availability of features in the new platform as a work-around

This is a very important stage. The faster you identify the components which may not be available or will need process change, the more time the business needs to adopt it. For successful implementation of any field force solution, it is imperative to involve the business from the start and provide enough time to adopt changes. Processes which are obsolete, or which are not being used, should be identified and de-commissioned, so they are not carried forward to the new solution.

### *Continuous improvement and future product releases*

This is a typical last step for any implementation. The focus should be on continuous improvement, so that the customer constantly benefits from the robust platform.



## Migrate to FSL: pros and cons

Positives	Negatives
<ul style="list-style-type: none"><li>• Follow the road map defined by the product</li><li>• Leverage the institutional strength of Salesforce</li><li>• Leverage the benefits and synergies of Salesforce products</li><li>• Leverage various power apps built on the Salesforce platform which enhance productivity</li></ul>	<ul style="list-style-type: none"><li>• The FSL product road map is not clear</li><li>• The product has to make changes to accommodate the utility's functions such as damage assessment, map-based assets features</li><li>• Lack of capability to handle large storms and storm processes</li><li>• Lack of flexibility for utility-specific needs</li></ul>

## Our recommendation

This option is suitable for:

- Enterprises making significant investments in Salesforce products, which will enable them to derive synergies across products as well as license costs
- Utilities which are on ClickSoftware 8.3 or FSE, and can afford to wait until the FSL utilities road map is clear
- Utilities which want to align their business toward standard FSM processes.



## Alternative FSM Solution

For utilities not on 8.3 or FSE, and those that do not want to build their own custom apps, an alternative FSM solution is the only option. There are many service providers and many innovative solutions for enterprises to leverage. There are specific mobile workforce management (MWM) products which cater to niche business-critical utilities requirements. Products such as Clevest (now IFS) and KloudGin have integrated many functionalities in their products, which usually need separate apps. There

are various cloud-based products available in the market catering to different client sizes and customer numbers.

A recommended approach:

- A. Assess the needs – A comprehensive MoSCoW analysis is needed. Capability to requirement mapping is the first step in choosing the right product. Our methodology and accelerators can help reduce the turnaround time.
- B. Build the base – Once the product is chosen, the next big hurdle is change

management. It is important to adopt an Agile methodology, to involve the business from the start. It is all right to have setbacks, but it is important that the failures happen fast and the implementation team learns from each setback.

- C. Next-gen features – There are many next-gen AI features which utilities have not yet adopted. This stage allows you to incorporate these features to drive more value.

## Alternative FSM solution: pros and cons

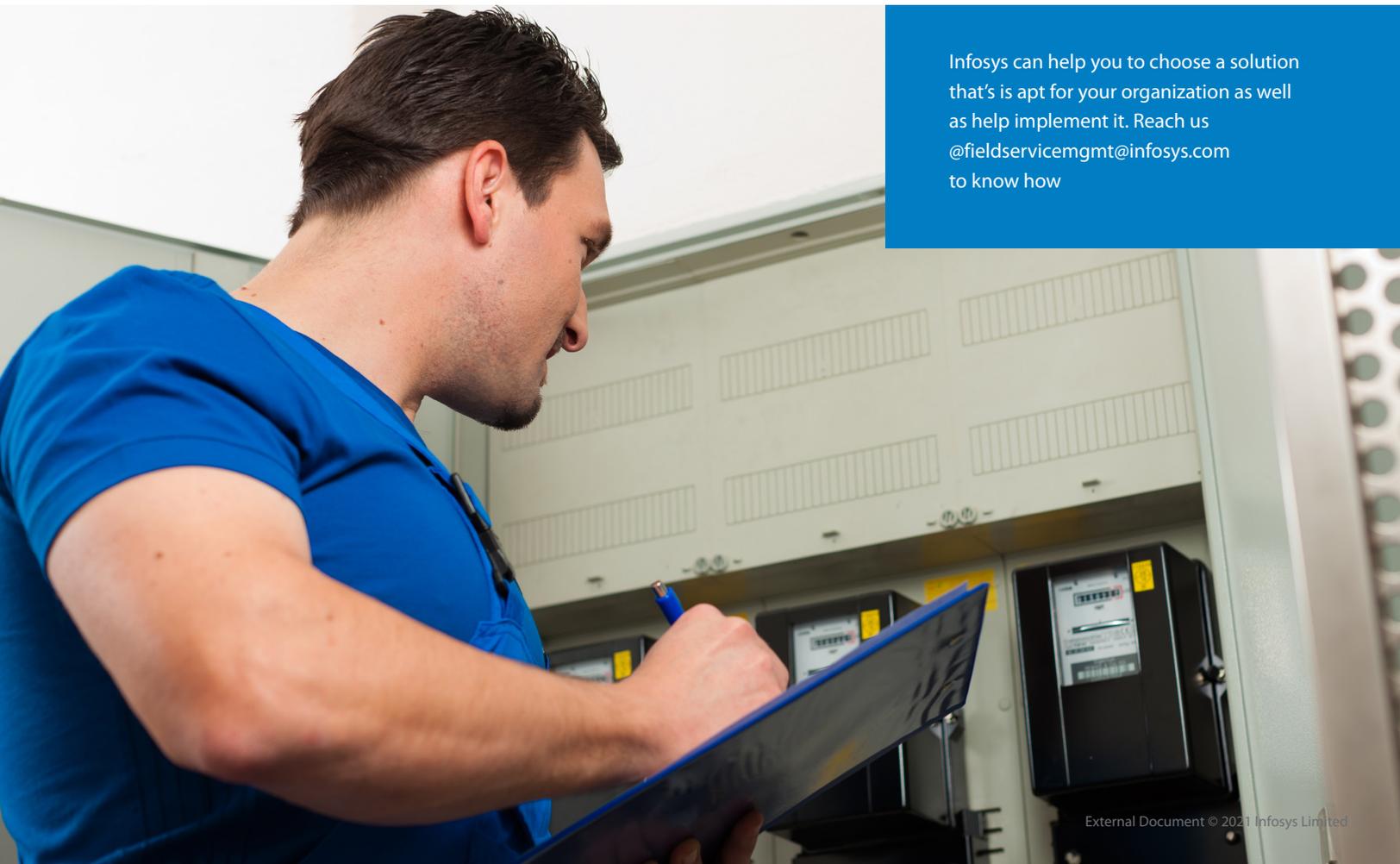
Positives	Negatives
<ul style="list-style-type: none"> <li>The options are many, which is a positive and a negative</li> <li>Can be cost-effective compared to FSL</li> <li>In-built map features, and handles typical use cases of utilities</li> </ul>	<ul style="list-style-type: none"> <li>The options are many, which is a positive and a negative</li> <li>Lack of scalability to handle storms</li> <li>Release plan and continuous improvement road maps of these products need to be evaluated</li> </ul>

The products offer almost similar features but have individual strengths and weaknesses. The table indicates a high-level analysis of such products.



Feature / capability	Field Service Lightning	Oracle Field Service Cloud	Clevest (IFS)	KloudGin
Cloud offering or on-premise	Cloud only	Cloud only	Both	Both
UI and intuitiveness for field users	Advanced	Good	Emerging	Advanced
Integration with GIS and Map Viewer	Not out-of-the-box, needs adapters to be built	Not out-of-the-box, needs adapters to be built	Map Viewer available, integrates with Esri out of the box	Map Viewer available, integrates with Esri out of the box
Utility-specific damage assessment	Not out-of-the-box, custom solution needs to be built	Not out-of-the-box, custom solution needs to be built	Out-of-the-box	Not out-of-the-box, custom solution needs to be built
Voice response processing-based workflows	Basic	Emerging	Basic	Advanced
Integration and scheduling features	Advanced	Advanced	Emerging	Emerging
Reporting	Advanced	Good	Emerging	Emerging
Configurations, customization capabilities	Advanced	Advanced	Configuration is advanced while some customization features are still dependent on the product vendor	Advanced

There are several choices with no one size fits all solution. A detailed fit-gap analysis of the product capabilities is key to success. As utilities are looking to modernize their ageing grids, choosing the right solution not only makes sense but is crucial to achieve targets faster.



Infosys can help you to choose a solution that's apt for your organization as well as help implement it. Reach us @fieldservicemgmt@infosys.com to know how

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Sakti has 17+ years of experience working with electric and gas utilities, telecoms across the globe. He has been involved with more than 5 complex Click Software Implementations, implementing successful scheduling, dispatch and execution system for the customers. As a solution architect, he helps customers selecting the right product, set up the functional and technical architecture and establish the end to end customer journeys. He is also a certified Salesforce professional, working in the area of FSL implementations replacing the Click 8.X version.



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Mithun has 18+ years of working experience with gas and electric utilities across North America. He has been involved in multiple large scale work and asset management projects, GIS and field service management implementations. In his current role as Director of Client services, he partners with clients on their digital transformation journeys and advises them on product selection and implementation. He is also involved in the development of GIS and Field Services practice at Infosys and is an avid follower of application of AI in utilities.

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