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Automated Service Scheduling Implementation Guide

Automated Service Scheduling

Are you ready for automated service scheduling? If you're reading this then you've probably already decided you would like the benefits of a more efficient schedule, reduced travel time and costs, and more satisfied customers. But what next?

The next step is to start thinking about your field service business and how you can implement automated service scheduling – what do you need to know in advance, what changes will you need to make, and most importantly which software should you use?

There are 2 stages to the process of effective automated service scheduling:

- **Planning (Which services and how often?)**

- **Scheduling (Which engineers and when?)**

For each stage there are important questions for you to consider, which focus on the key capabilities that you will need to implement an automated service scheduling solution.

Planning Stage

First of all, you will need to be able to track which service jobs must be completed and when. Even the most sophisticated scheduling workflows are of no use if they aren't underpinned with the correct information. On top of that, your business requires a job management software that can properly manage all of that customer and service contract information.

Depending on whether you service commercial or residential properties (or both) will determine how you approach the planning stage. It's important to consult your team and any decision-makers as you consider the best way to implement automated service scheduling.

The key questions are:

- **Can you support commercial PPM contracts?**
- **Can you record every type of service that is required at a property?**
- **Can you track how often each service is required?**
- **Can you record individual assets that are required to be serviced?**
- **Can you easily enter PPM jobs into your job management software?**
- **Can you track when residential services are due?**
- **Can you remind residential customers when a service is due?**

Can you support commercial planned preventive maintenance contracts?

Planned preventive maintenance (PPM) contracts are often required in commercial settings, especially for businesses such as fire and security companies who handle critical assets for buildings. A preventive maintenance plan can be complicated as there are many aspects to track and stay on top of. The first step is to make sure that your software can handle PPM schedules and contracts, as this will alleviate a lot of the admin burden. If you're not already aware of the reasons to operate a PPM strategy, read up on the benefits:

[Learn more about planned preventive maintenance](#).

Can you record every type of service that is required at a property?

If you offer PPM, do you know every service (and related tasks) that you must provide for the customer? If you are to send an engineer to service a lift, what exact tasks must they carry out? In order to implement an automated workflow, you will need to choose a software where you can list all of these tasks against the property or customer. If this sort of information is only kept in certain engineer's heads or across disparate systems it would be impossible to manage or automate.
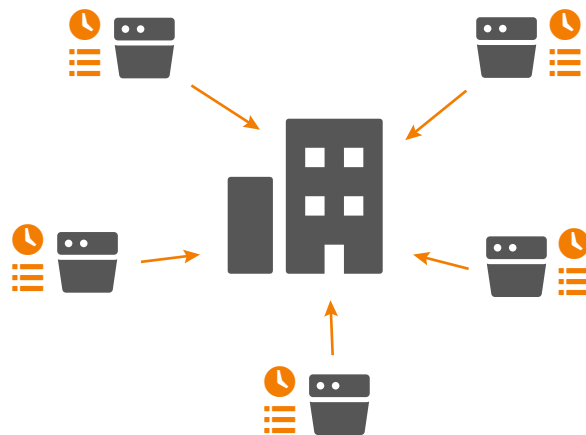
Can you track how often each service is required?

For the services and tasks identified in the previous step, how often are these required? This may vary per customer, however, some services will be legally required to be completed at a certain time by a specific rule and regulation. In order to make sure that the maintenance plan is stuck to (to satisfy both the customer and any regulations), it's critical that everybody knows how often and when these services must be completed. On top of logging each task, automation software should track how often they are required and any statutory dates to ensure your business stays compliant.

Can you record individual assets that are required to be serviced?

Both residential and commercial services may be linked to specific assets. Does your business currently have a way to accurately manage and track the assets (and their service history) at a property? If not, consider adopting software that provides access to detailed asset history so your team can stay up to date with any previous services, repairs, or malfunctions logged against an asset.

Can you easily enter PPM jobs into your job management software (if you have one)?

Automated service scheduling isn't possible without the right software. If your PPM jobs exist in a spreadsheet, it's not going to be possible to integrate that into your scheduling software without significant manual processing. A job management software that offers the ability to manage and schedule jobs as well creating maintenance schedules will provide the ideal solution.

To take things a step further, the best job management software will automatically raise the PPM jobs for you. This removes the need for office staff to manually input each job and the details of the service.

Can you track when residential services are due?

If you have installed an appliance for a residential customer (which should be serviced annually) can you currently keep a log of the installation and the next service date? Without this information, you cannot effectively automate any sort of follow up process. As we already mentioned, can you also track these services by asset and see the previous service history? Tracking assets and service reminders in a spreadsheet is near impossible – look for software that will allow you to do both.

Can you remind residential customers when a service is due?

Residential customers will likely not have a PPM contract for their services. Take for example, a yearly boiler service – any gas engineer could provide that service – how do you ensure they return to your business instead? By prompting the customer in advance, you can remind them a service is due and increase your chances of securing the job. Effective job management software will allow you to automate this process, so your team does not have to check up and manually send these communications.

Scheduling Stage

If you are able to track the services that need to occur and by when, the next step is scheduling the appointments. To implement automated service scheduling you'll need to have access to a mass scheduling engine. This is an algorithm-powered tool that can schedule multiple jobs at once and find the optimal route. There are several factors that your business needs to consider when implementing automated scheduling.

Key questions are:

- **Can you schedule jobs in bulk?**
- **Can you schedule around engineers' shift patterns?**
- **Can you log each of your engineers' skills?**
- **Can you instantly dispatch jobs to engineers?**
- **Can you automatically send confirmations and reminders to customers?**

Can you schedule jobs in bulk?

If you're currently managing scheduling through a paper diary, Google calendar, or basic job management software, the answer will be no. A mass scheduling engine is an advanced and powerful tool that can offer a higher level of operational efficiency for your booking process. With mass scheduling, you can book hundreds of appointments for your engineers in a matter of minutes, taking into account many different factors. Not all job management software can offer mass scheduling, but it's a vital component if you wish to fully implement service scheduling automation.

Can you schedule around engineers' shift patterns?

In order to automate scheduling, a scheduling engine needs to be able to take into consideration each of your engineers' shifts. Without this information, the system might book jobs at inappropriate or unavailable times for your team (e.g. if certain engineers work late shifts or only work specific days). Additionally, what overtime shifts can your engineers work, how much overtime pay do they get, and what breaks do they take per day? All of this will need to be considered and should be part of any effective software solution for service scheduling.

Can you log each of your engineers' skills?

A large part of automated scheduling is not just deciding when an appointment should be carried out, but who should be sent. If you offer services that require different types of skills or levels of expertise, you won't be able to send just any of your engineers. A specific service may require a particular engineer - you'll need to make sure that any automated scheduling system you're considering can record and interpret this information. If you don't already, start writing down the skills that each job requires and the skills that your engineers have, so you'll have this information ready to input once you have picked a software solution.

Can you instantly dispatch jobs to engineers?

Dispatching the job to the engineer is one of the last steps in the automated service scheduling process. By implementing the right software, there is no need to manually print or email job sheets for your engineers. When a service job is created, scheduled, and assigned to an engineer it should be automatically sent to the engineer's smartphone for them to accept of reject. Job management software with an engineer mobile app is therefore crucial for a fully automated workflow from the office to the field.

Can you automatically send confirmations and reminders to customers?

When a job is scheduled, can you automatically inform the customer? Manually sending confirmation emails or SMS to your customers is a burdensome process and a waste of time. You'll want to automate this process too, so confirmations and reminders are sent with little effort or time required from your team. Automated communications will be included as part of any good job management software and is easy to implement.

A Comprehensive Solution

Commusoft job management software offers all of the required tools needed to implement automated service scheduling, from PPM contracts to mass scheduling.

During the planning stage, Commusoft can be used to create and manage commercial PPM schedules, with every task (and statutory date) logged against a property. Jobs from the PPM schedule will then automatically be created in advance by the system, without the need for manual processing. For residential properties, you can also benefit from automatic service reminders that track services and let customers know when their next one is due.

For the scheduling stage, Commusoft offers an easy-to-use mass scheduling engine that harnesses your engineers' shift patterns and skill sets to create the optimal service schedule. By using intelligent routing algorithms, you can significantly cut down on both travel time and costs, as well as admin time for your scheduling team.

Learn more about intelligent scheduling.

The mobile app allows engineers to receive jobs in seconds and the communication suite can automatically send job confirmations to your customers. With Commusoft you are able to automate the entire service workflow from initial planning and scheduling to execution and follow up. Commusoft also offers additional functionality that we've not covered, including invoicing, certificates, asset management, SLAs, reporting, and much more.

Book a demo to find out more today!

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