

Field Service Scheduling Software Selection Checklist



Choose the right field service scheduling software for your business



Comprehensive scheduling and dispatching

The core functionality of a scheduling tool is of course a solid scheduling and dispatching console. Ideally, it should shift between different views.



Real-time visibility into technician availability

Get a bird's eye view of your workforce so that you know who's available at any given moment to speed up your scheduling process.



Automated job and work order management

Rather than manually scouring around for work orders and jobs, look for a tool that automates assignments, reducing manual effort and errors.



Route optimization for efficient service delivery

An ideal FSM scheduling software should provide route optimization to minimize travel time, improve technician productivity, and increase customer satisfaction.



Mobile scheduling for on-the-go accessibility

Your choice of field service management tool should allow technicians access to their schedules and updates from mobile devices.



Security protocols to protect sensitive data

We don't have to tell you the importance of data security, so ensure that the tool of your choice has robust security and encryption features.



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Advanced analytics for performance insights

The field service scheduling software should offer actionable insights to help monitor workforce performance and make data-driven scheduling decisions.



Seamless integration capabilities

Identifying an FSM tool that plays well with your existing tools, such as ERP and finance systems will help you get the most out of your field service process.



Customer portal for enhanced client interaction

Offering your customers a portal to manage and track their requests can open up the gates of communication, ultimately increasing customer engagement.



Scalability to grow alongside your business

Every business aspires to thrive, so your ideal FSM tool must be flexible enough to adapt to your existing needs while allowing you ample room to grow as your operation expands.



User-friendliness for a small learning curve

"I love using unintuitive tools," said no one ever. So, take your time to evaluate tools from a business user's perspective before taking a decision.



Robust and swift support operations

Although your implementation is a cakewalk, if your service provider's support team is hard to reach or takes eons to respond, you may end up paying the price for it.



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Real-time notifications and alerts

The best field service scheduling tools in the market keep all stakeholders in the know by shipping timely updates to everyone with an ETA and live tracking.



Role-based tracking for accountability

Restricting roles and data is an important part of keeping up with evolving compliance standards. So, your FSM software must offer role-based access and track activities on top of that!



Enhanced reporting to monitor key metrics

Reports are the key to data-driven operations, and they should be not only readily available but easily accessible and shareable with relevant stakeholders.



Take the total cost implication into account

Consider the total cost of ownership, including licensing, training, and any additional fees that you may have to dish out potentially by purchasing that tool.



Dive deep into user reviews and testimonials

There's no better social proof than that of current customers. So, don't forget to look at what the current users are saying about the software's performance and reliability.



Check for trial and sandbox options

Opt for a field service scheduling software that offers a trial period to test its features and suitability for your unique business needs.

