Why a Rapid Field Service Deployment

- Enable equipment services company a chance to…
  - Quickly determine if field technicians will be able to adopt new technology
  - See the value of automating the dispatch of work orders
  - Allow smaller businesses and budgets to gain advantage of big business competitors
  - Enable a “try before you buy” approach
  - Enable a larger business to start small and gain internal approvals
- Why Velosio?
  - Focus on SMB and Midmarket company’s end-to-end solutions
  - Field Service expertise for equipment service companies
  - Lowest cost deployment solutions in the market

Field Service Rapid Implementation

	Plan/Design	Build	Deploy/Support
Velosio Role	• Project Kick-off • Requirement definition • Application set-up • Project plan w/10 checkpoints	• Application Configuration (accounts, contacts, agreements, customer assets, products, price lists, work order, 3 incident types, work order tasks, characteristics, bookable resources, 1 mobile project, activities) • 3 Workflows or Flows • 2 Conference Room Pilot Sessions • Admin training • Data migration session	• User setup • Outlook Integration • Train trainer or users • Production setup • OOB Dashboards • 20 hours Go-live & post implementation support
Client Role	• Documented field service process • Single BU • OOB roles + 2 custom	• Minor field remove/add approval • Attend training classes • Review system build, identify changes • Complete data load template, extract and cleanse data • Facilitate pilot and pilot feedback	• Train users • Assume administrative support role • Join CRMUG, etc.

Goal at the end of this process is to have a fully functioning Field Service system.
Out of scope: Third party applications and system integrations.
Client must meet deadlines and agreed upon schedule.

$72,000 Fixed Fee

Velosio