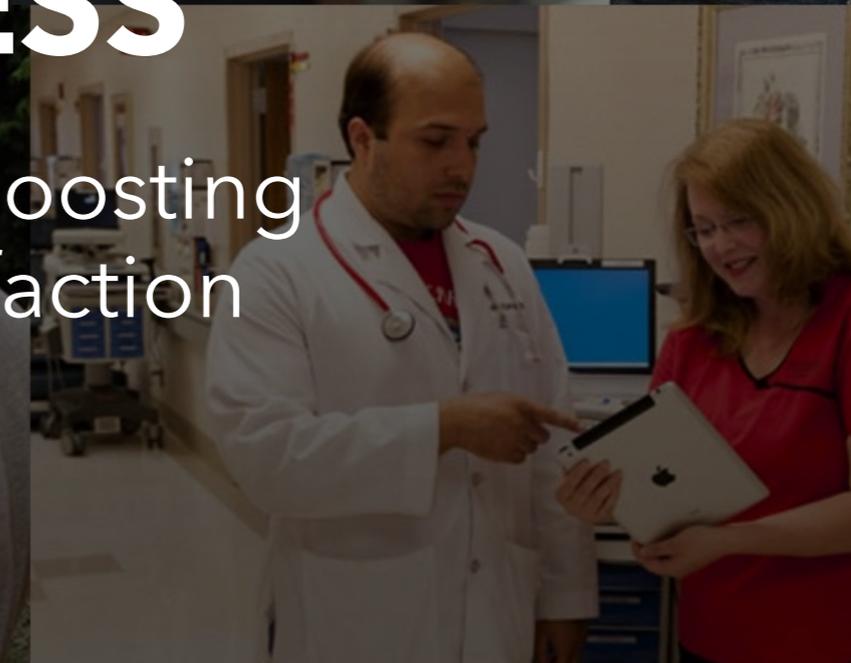
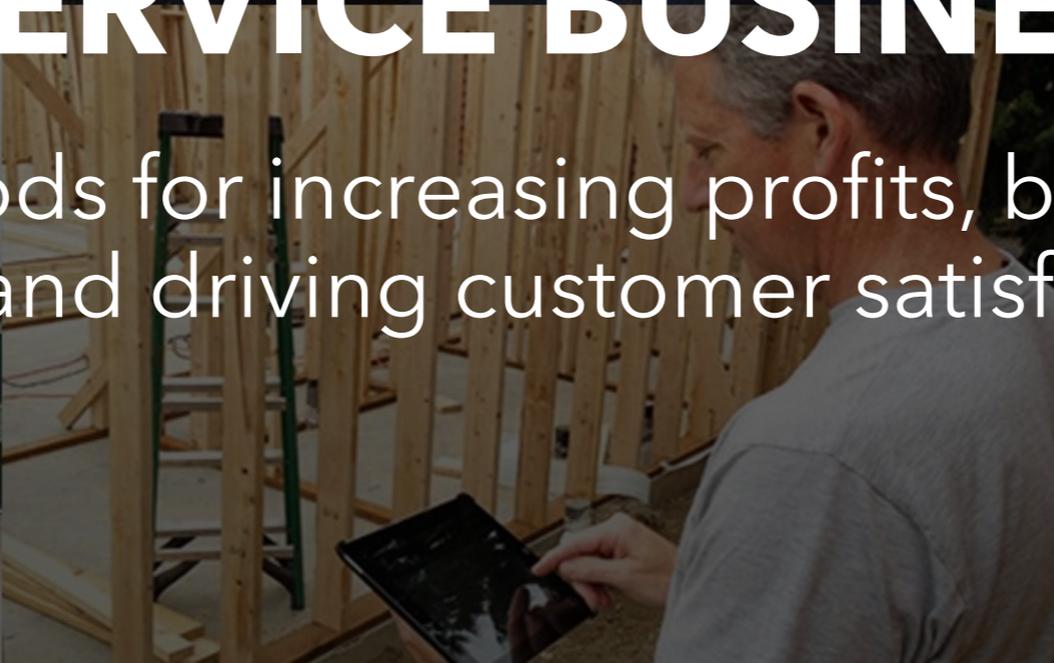
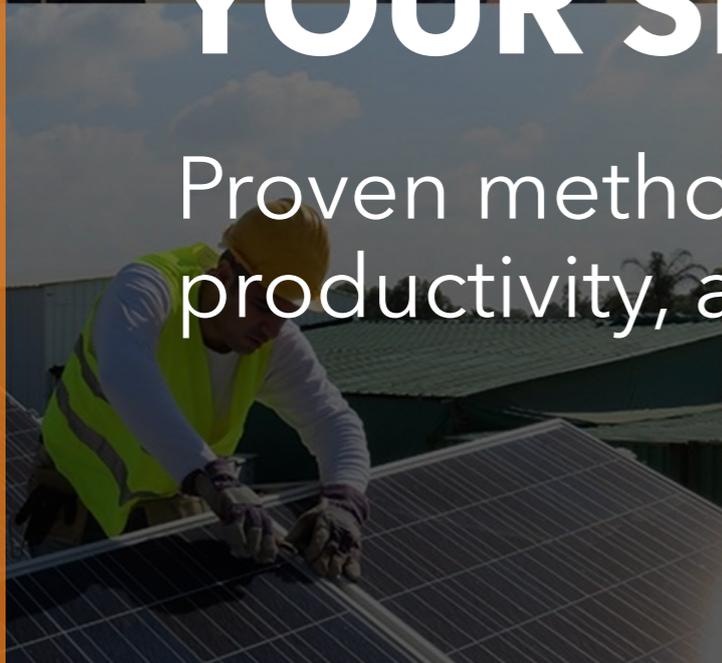


 **FileMaker**
An Apple Subsidiary

HOW TO TRANSFORM YOUR SERVICE BUSINESS

Proven methods for increasing profits, boosting productivity, and driving customer satisfaction



Transformation is essential, not optional.

Service businesses are overwhelmed by day-to-day organizational and operational challenges that reduce profits, lower productivity, and diminish customer satisfaction.

In this age of the Internet, it's easier than ever for customers to switch between competitors and dissuade potential customers if they aren't fully satisfied with their experience.

Drawing on data collected from hundreds of service businesses around the world, this essential handbook shows you how to overcome the main challenges preventing businesses like yours from succeeding now and in the future.

It's time to end the pain!



Overcome day-to-day challenges with a custom app.

Let's get started



In this ebook, you will:

DISCOVER six ways to transform your business via a custom app

- Eliminate your paper processes
- Streamline your scheduling (and rescheduling)
- Share critical information between your field teams and main office
- End the search for documents, photos and videos
- Generate reports, invoices and estimates in the field
- Empower your field staff to do more

DEFINE your transformation

- What do you want to transform?
- Why will it make a difference?
- How will you measure progress towards your goal?

MAP out the process of transforming your business

- Plan for your custom app
- Create your custom app
- Deploy your custom app



Custom apps...

- are designed by you and built around your existing processes
- don't force you to conform to a new approach
- have just what you want and nothing you don't
- can grow and change as your needs do
- integrate with your other systems

What is a custom app?



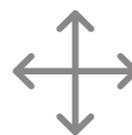
Tailored

A custom app is an app created using the FileMaker Platform that is designed to meet the unique business needs of a team.



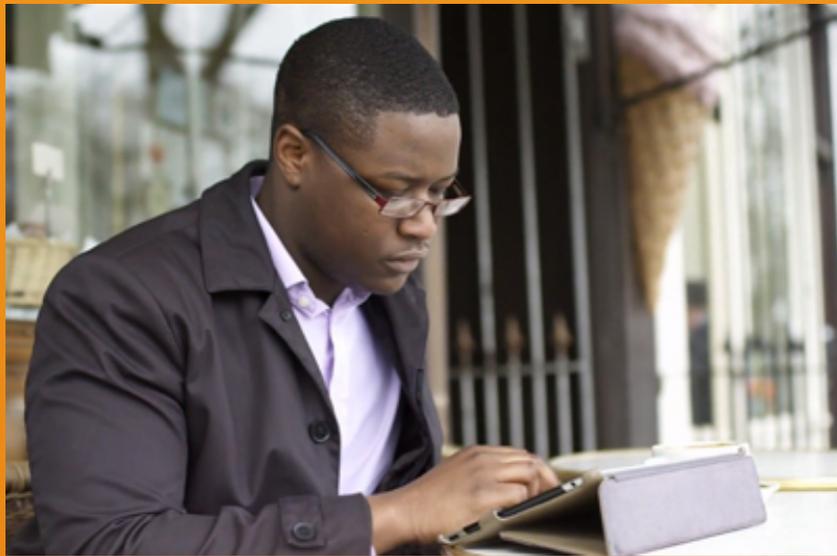
Flexible

Custom apps can be built from scratch or by modifying an existing Starter Solution.



Cross-platform and mobile

Custom apps work seamlessly across iPhone, iPad, Mac, Windows, and the web. Success, in this digital age, is increasingly dependent on the connected experience a custom app provides.



“Using a FileMaker custom app has been a totally amazing experience. Quick to develop, easy to use, and it does exactly what it's supposed to. It's helped to fundamentally change the way I do business, and that's an incredible thing.”

– Jeremy Arnold,
Managing Director,
Arnold DaSilva

Helping Arnold DaSilva's profits grow 577%

Problem:

Arnold DaSilva is a logistics company specializing in immigration administration. With numerous sensitive documents moving back and forth between government agencies and law firms, the Arnold DaSilva team needed a way to capture client data, track each application's progress, and update clients and partners in real-time. The business couldn't scale and grow.

Solution:

Arnold DaSilva's custom app enables the management team to monitor the team's progress from headquarters while the field team is on the move. It also sends automatic updates to clients and partners.

Result:

Streamlining operations catalyzed Arnold DaSilva's growth. The time the management team had wasted on inefficient processes was freed up to focus on developing the business. Increased visibility into field operations enabled management to scale the business. Revenues increased and profits grew 577%.



"Before moving to FileMaker custom apps, we collected daily reports only once a month and then transferred all the data from paper to spreadsheets. This process took 3 days. Our custom apps have completely eliminated inefficiencies caused by time-lag and duplicate data entry. We now capture and share data in real-time in a way that is tailored to our business structure and operations. This allows us to deliver excellent service and respond to issues immediately."

– Kazuaki Ito,
Business Director,
Nexco Maintenance Tohoku

Turning Nexco into an industry leader

Problem:

Nexco Maintenance Tohoku maintains the roads and highway facilities throughout northern Japan. Given the huge geographic area, each team at Nexco functions in a unique way and has specific needs. Paper work orders and reports were proving inefficient and painful for the teams to manage.

Solution:

The FileMaker Platform enabled each team to develop a custom app that could easily be modified as the needs of the team evolve. Nexco uses FileMaker custom apps on iPhone, iPad, Mac, Windows, and the web to conduct routine and safety checks, track inspection results, and issue reports that include relevant photos and videos. This enables maintenance crews and work site inspectors to stay connected and function effectively.

Result:

The organization started out with 8 custom apps, but has since expanded to 12 to meet the needs of each team. The results have been dramatic. Using its custom apps, Nexco streamlined operations and improved service quality substantially. Nexco became widely recognized for its excellence in road and highway facility maintenance. Today, Nexco is regarded as an industry leader; it sets high standards for maintaining roads and highway facilities around the world.

1

Eliminate your paper processes

Go from paper to iPad or iPhone

One of the most important components of transforming your service business, is to move from a paper-based system to an electronic one.

This will eliminate 100% of duplicate data entry and time wasted rekeying paper forms at the end of the day. It will also provide you with productivity and profit-boosting benefits including:

- Providing everyone instant access to real-time information on customer details, including a history of past interactions, hours worked on each call, related photos and other key details.
- Making scheduling much easier by having the right person with the right expertise and the right parts dispatched to each call.
- Managing and dispersing new work orders and change requests without requiring technicians to come back into the main office or take phone calls, emails or texts from dispatchers.
- Allowing for easy generation of service reports that contain the most up-to-date stats on key metrics.



"Our FileMaker custom app lets staff stay on the show floor helping exhibitors, versus running back and forth to our service desk to grab work orders or change requests."

– Joe Gonzalez,
IT Services Manager,
Austin Convention Center

Eliminating paper at the Austin Convention Center

Problem:

The Austin Convention Center is a large event center, best known as the home of the popular South by Southwest (SXSW) festival. The convention center needed to automate work orders and the processing of change requests to meet exhibitor needs. They were drowning in paper and wasting time and money. Every work order and change request form or fax was entered into the system, then printed, and distributed via bulging binders.

Solution:

Staff were equipped with a FileMaker custom app, running on iPads and desktops, showing real-time updates to work orders and change requests. Now planning teams easily access and updated work orders as well as booth diagrams wherever they are in the center. Validation teams use the custom app on the show floor to ensure that work has been completed to specifications. The app also also gives managers visibility to the full event schedule and work order pipeline—making planning and staffing smoother and easier.

Result:

ROI of over 200% in under four months. Austin Convention Center increased customer satisfaction and team productivity by being able to respond more quickly and effectively.



2

Streamline your scheduling

Right person. Right place. Right time.

Having the right person in the right place at the right time - with the right parts to resolve a call on the first visit is the ultimate goal for most service businesses.

When your first time fix rate exceeds 85%, your profitability and customer satisfaction will skyrocket. In turn, so will your favorable customer reviews and referrals, which will power your on-going growth.

What happens when all your customers, technicians, parts, and scheduling are centralized and accessible in a custom app?

- Expertise will be matched to jobs.
- Proper parts and equipment will be on hand.
- Travel routes will be optimized.
- Arrival windows will be minimized.
- Cancellations and reschedules will be instantly communicated.



“By running our FileMaker custom app on iPads, we have been able to achieve a dramatic breakthrough and the end result is a much needed value proposition for healthcare: improved quality at reduced costs.”

– Michele Lee,
President,
Lee Medical Services

Improving patient outcomes at Lee Medical Services

Problem:

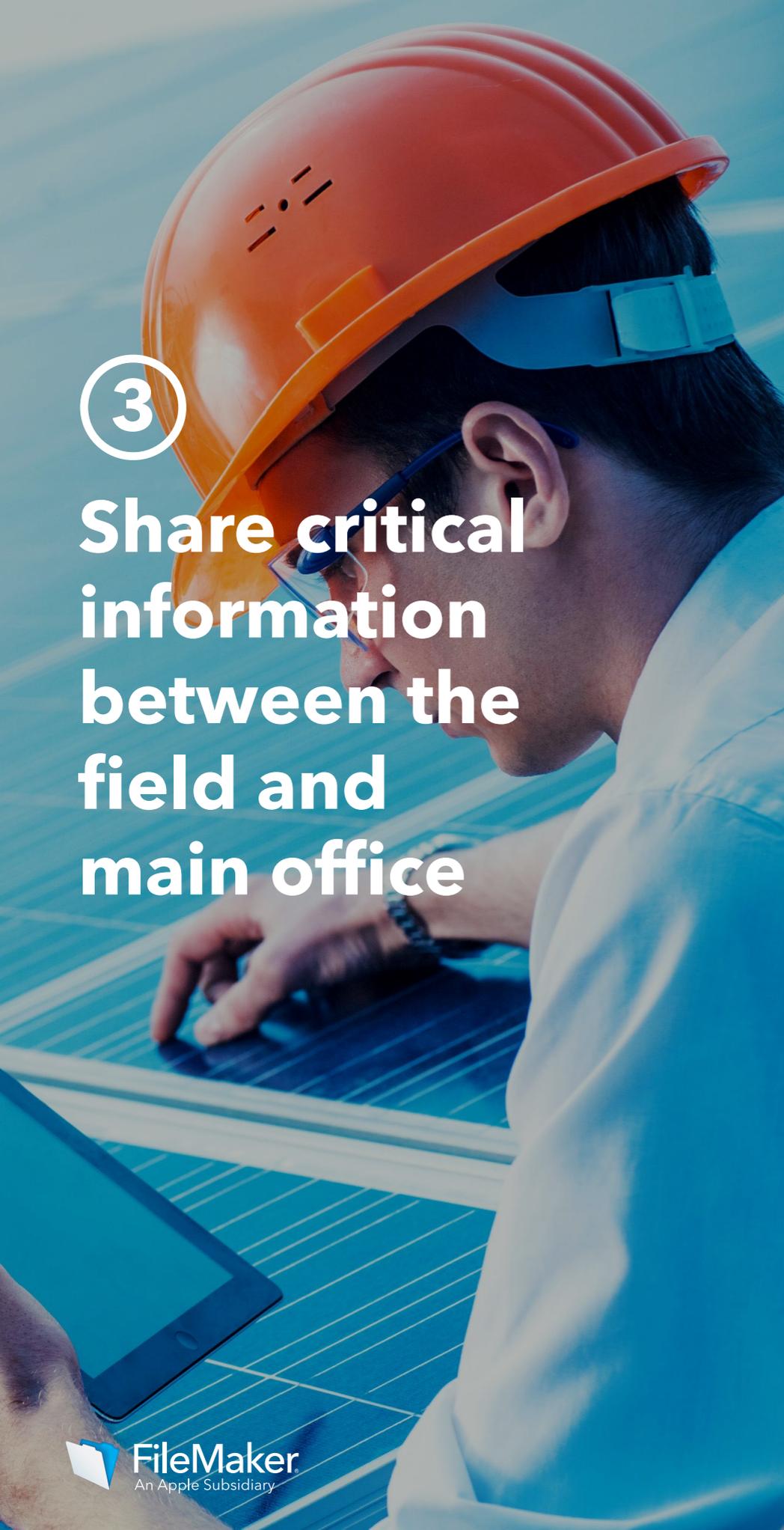
Lee Medical provides medical services to hospitals, acute care facilities, rehabilitation centers, homes, and correctional facilities. Lee Medical needed to ensure that its mobile nurses were accessing patient records in real-time and using the right devices at the right time to drive down the troubling frequency and cost of Central Line Associated Bloodstream Infections.

Solution:

Mobile nurses use a FileMaker custom app, running on iPads and desktops, to chart and monitor all patient and device-related information. The custom app enables mobile nurses to provide patients with quality care while minimizing infection rates.

Result:

Lee Medical significantly improved the quality of care for patients while saving millions of dollars annually for healthcare providers. Lee Medical Services now has a track record of less than 0.5 infections per 1,000 catheter days as compared to many hospitals that report infection rates between 2 and 18 per 1,000 catheter days.



3

Share critical information between the field and main office

Real-time updates keep everyone informed

Imagine getting instant updates every time a service call is completed, with complete details of services performed, parts used, and time spent—it's possible with a FileMaker custom app.

What is your critical business information? Customer spreadsheets? Work order lists? Site or inspection photos and videos? Inventory? Whatever it is, you can import it into your custom app and link the details to each customer. This will give your main office team and field staff real-time access to the most up-to-date details of your business, including:

- Basic customer information such as names, numbers and addresses.
- Lists of previous and upcoming work orders related to each customer.
- Notes from previous interactions and conversations with each customer.
- Copies of each signed contract.
- Photos of equipment, appliances, or job sites.
- Time spent by each technician for every work order.



"Once we saw how we could automate even more data collection, we quickly added more modules on the fly so we could have as much data as possible managed with the FileMaker mobile solution. This made the communication with our field staff simpler because we were literally working off the same page when they entered survey or water quality data."

– John Lucero,
Program Manager,
E2 Consulting Engineers

Keeping everyone in sync at E2 Consulting Engineers

Problem:

E2 Consulting provides engineering, environmental consulting, oil and gas pipeline, infrastructure operations, and remediation-related services. E2 was struggling to keep everyone involved in the cleanup of the Sulphur Bank Mercury Mine Superfund site on the same page. Logging and reporting on clean up activity between 8 different regulatory agencies, 7 subcontractors, and 20 onsite engineers, scientists and construction staff was cumbersome and time-consuming.

Solution:

Teams were provided with a FileMaker custom app, running on iPhones, iPads, desktops, and the web. This custom app captures daily project logs and photos, tracks change orders, issues health and safety reports, submits data files to subcontractors, provides daily quality control reports, and disseminates information to EPA officials. The custom app also allows multiple levels of access privileges, which ensure security.

Result:

E2 was able to improve its cleanup operations while saving time and money. The centralized data on its FileMaker custom app provides insights that significantly enhance the cleanup progress.

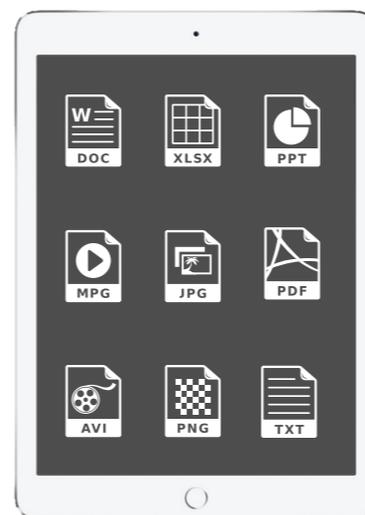
4

End the tireless search for documents, photos and videos

Everything together is a beautiful thing

Stop wading through folders of photos, videos, movies, contracts, spreadsheets and presentations. A custom app enables you to easily store those files right alongside everything else related to that client, job or project.

Get organized. Connect related files, including PDFs, videos and images. Your custom app reflects how you enter, update, and use your business information.



- JPG, PNG and TIFF images
- PDF, DOC and PAGES documents
- MOV and WAV multimedia files
- XLSX and NUM spreadsheets
- KEY and PPT presentations
- CSV, XML and ODBC data

Types of information that can be managed with a FileMaker custom app.



A custom app consolidates your information into one place for access via iPhone, iPad, Windows, Mac, and the web.



Our business is completely transformed. We're thriving because of our highly productive workforce and happy customers who are constantly referring us to others. Investing in a FileMaker custom app made all the difference. The future of BDS is bright—we no longer have anything standing in our way.

– Manfred Dübner,
CEO,
Building Development
Service GmbH

Aligning images and work records at Building Development Service GmbH

Problem:

Building Development Service GmbH (BDS) is a German property management company. BDS juggled Excel and point solutions to track work orders, maintenance tasks and projects for the facilities they managed. The many site photographs required to document problems and completed fixes were a constant problem—lost, saved to the wrong folders, hard to access when meeting with customers.

Solution:

BDS uses a FileMaker custom app to manage workflow, tracking information about every property and each repair done on site. Mobile workers are able to take photographs to document each stage. The custom app also tracks billable hours for each worker, enabling workers to easily and accurately complete time sheets.

Result:

Customer satisfaction increased by 75%. Productivity also increased dramatically because of increased visibility and accountability. BDS is now able to easily trace each project from issue to resolution.

5

Generate reports, invoices and estimates in the field

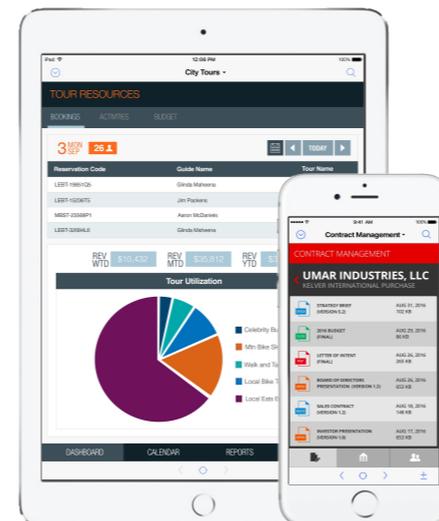
Turning a sea of info into data you can use

What good is capturing and storing information if you can't access, view, or share data easily?

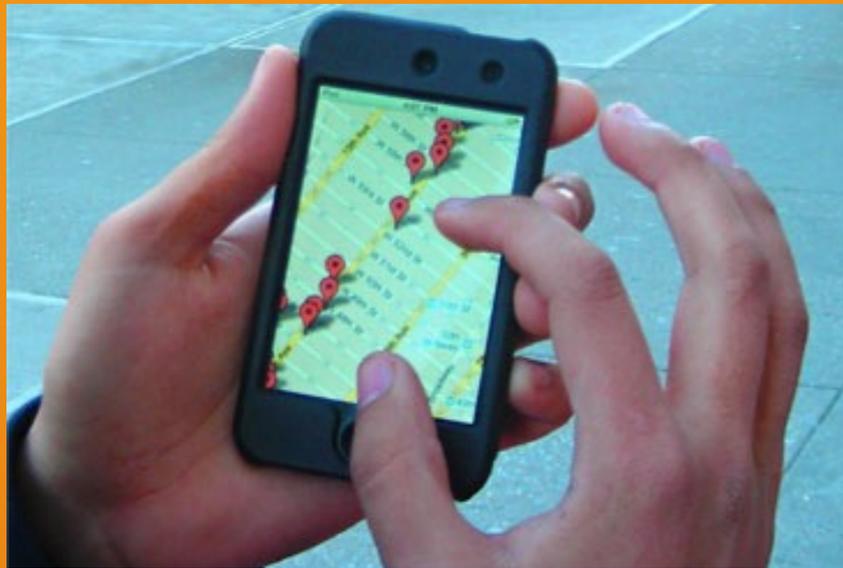
Information stored in FileMaker custom apps can be easily accessed, viewed, and shared from an iPad, iPhone or desktop. FileMaker custom apps come with built-in reporting capabilities that enable you to generate insightful summary reports, invoices, and estimates instantly.

Your FileMaker custom app can provide real-time insights through executive dashboards, timely alerts, and visual data, enabling you to act quickly and effectively.

Insights from FileMaker custom apps help business leaders take actions that increase profits, improve productivity, and keep customers happy.



- Create reports, invoices and estimates in popular formats including Microsoft Excel or PDF.
- Publish them to the web for easy access by clients and staff.
- Create executive dashboard summaries and have them automatically emailed daily.
- Visualize the data by adding pie charts and bar charts.



"We got almost immediate return on investment by saving \$40,000 a year on staff performing outdated tasks like re-keying data and struggling to pair photos with disparate data coming in from the field. By eliminating the need for double data entry, reports are generated in about 80% less time and the chance of error has been virtually eliminated."

– Dean Stallone,
CEO,
PMD Promotion

Generating reports 80% faster at PMD Promotions

Problem:

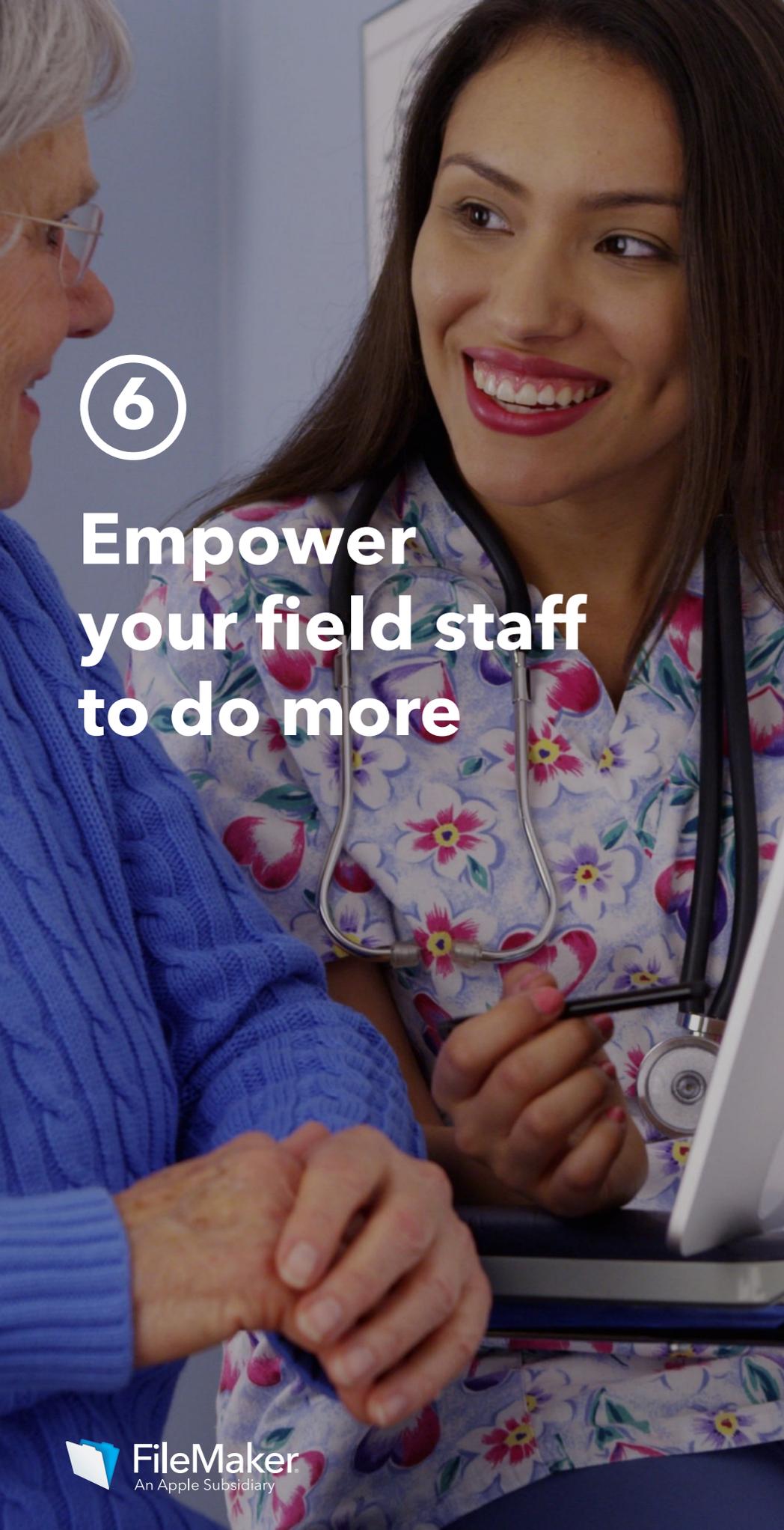
PMD is a leading window poster advertising company that is active in 20 urban markets. PMD needed a way to orchestrate the efforts of 75 mobile display reps. Campaign details were sent via fax and email, photos were sent via FTP, handwritten notes were illegible, and hours were wasted re-keying information and matching up content.

Solution:

Display reps use a FileMaker custom app to capture images, notes and venue details directly into one place, eliminating the need for double data entry. PMD management use the custom app to generate insightful reports.

Result:

Processing time for reports has been reduced by 80 percent. In a matter of minutes, PMD creates reports that integrate photos, venue lists, statistics, and location maps into a single, easily digestible format. This enables PMD's management team to take actions needed to reduce costs, improve operations, and satisfy clients.



6

Empower your field staff to do more

Going above and beyond

Go beyond work order processing and empower your field team to do more. By providing technicians access to schedules, cost of parts and time needed for tasks, they can take on tasks that lead to additional revenue and even more satisfied customers.

You can empower your field staff to take on sales, marketing, and customer service roles by allowing them to:



Pre-schedule follow up calls while on site with the customers.



Upsell new services and generate new estimates instantly.



Get invoices signed and emailed to the customer before leaving the building.



Record instant customer feedback and star-ratings that can be used on social media to attract even more customers.



“We've just rolled out several hundred iPad devices throughout all our branches. As a community-based local bank, customer relations is very important for us. Thanks to FileMaker with iPad, we've become a pioneer in developing a unique kind of customer service, which differentiates us from others.”

– Ren Kuroda ,
Administrative director,
TOYOTA Credit Union

Improving differentiation and customer satisfaction at TOYOTA Credit Union

Problem:

TOYOTA Credit Union is a large local Japanese bank with 38 branches. The customer service reps relied on portable data terminals with limited features. The reps were unable to efficiently schedule appointments and access key information on customer accounts.

Solution:

The customer relations reps now use a FileMaker custom app to schedule the customer visits quickly and efficiently on their iPad devices. They can securely access all the information they need via the custom app while visiting customers.

Result:

The custom app resulted in an immediate reduction in scheduling appointments, resulting in more time for meeting prep and addressing customer needs. Being able to respond to customers' inquiries immediately and accurately by using the custom apps, they are providing better financial services and customer satisfaction has improved. They see this immediate access to customer data as a key competitive advantage over other banks where real-time data is unavailable in customer meetings.



Define your transformation

The process of transformation starts with defining what change means to your field services organization.

This three step framework will help you set the stage for effectively transforming your business.

What = Mission

Why = Purpose

How = Metrics

What, Why, and How?



What is your Mission?

To have electronic access to customer information so that technicians can record complete details regarding services performed during service calls in the field on iPad. End the practice of using paper forms that are re-rekeyed at the end of each day.



Why are you doing it?

Explain the purpose of why you want to accomplish the mission above. Help your team understand what's important about the mission and how it will benefit the organization as a whole.



How will you measure progress?

Outline a plan for how you will measure progress towards accomplishing your mission. Key performance indicators should be communicated to your team regularly.

How Coastal Heating and Air Defines Their Transformation

This is a marathon, not a sprint so start small - any process you improve will make a positive difference in your business.

Mission. Purpose. Progress.



Mission

To have electronic access to customer information so that technicians can record complete details regarding services performed during service calls in the field on their iPads instead of using paper forms that are re-rekeyed at the end of each day.



Purpose

By having information entered on devices in the field, we'll have instant access to up-to-date information on service call outcomes, parts used, time spent and more. This, in turn, will:

- Maximize customer satisfaction
- Drive growth
- Increase profitability



Progress

Key metrics that will be used to measure how well we're doing toward our mission, include:

- Hours spent on data entry
- First time fix rate
- Time to repair rate
- Customer satisfaction ratings



Let's rollout
your
custom app

The 3 steps to implementing your custom app

Now that you've seen how custom apps transform businesses like yours, let's discuss how to get started on your own custom app.

Remember that this is a marathon not a sprint, and each individual process you improve will make a difference to your business.



Step 1: **Plan**

map out your needs and requirements



Step 2: **Create**

build your custom app



Step 3: **Deploy**

share it with your team



Plan

The first step to getting your custom app is to map out your needs and requirements.

Read the complete guide to planning your custom app to learn more.

[Download eBook](#)

Plan your custom app

State your goals

Remember the mission you created when you defined your transformation? How does this align with your business goals, team's goals, and user's goal?

Write user scenarios

Specify who will use your app. What will they do with it? Where will they use it? When will they will use it? On which devices will they use it?

Define needs for integration, security and deployment

Determine what other data source you'll need to link to, such as QuickBooks or other accounting software. What type of security will be needed and how you will share the app with your team?

Develop and test your prototype

The goal of a prototype (even if drawn on paper) is to check the concept of your custom app with the team before you invest too much time in development.

Decide how you will get it built

Depending on your level of expertise, you can build your custom app yourself from scratch, hire a certified FileMaker consultant to do it for you, or hire a coach for a blended approach.



Create your custom app

Learn the database basics

First, you'll want to be sure you're familiar with basic database concepts, including fields, records, tables, relationships, attributes and entities.

Design the data model

Here you will decide what type of data will relate to other types of data, such as individual work orders being linked to specific customer.

Design the user interface

The user requirements gathered in the 'Plan' step of this framework will help you decide how the user interface needs to look, and what the business rules are to connect your data.

Import data & integrate with other data sources

Drag and drop your Excel files or other supported format and integrate them with external data sources such as MySQL, Oracle or Microsoft SQL Server.

Create the business logic and design workflow

Business logic is the programming that manages the communication between an end user interface and a database to enable the desired workflow.

Set up security

Create user accounts and assign privileges to each user. The FileMaker Platform employs a unified security model, where the security that you establish for an app is applied across iPad, iPhone, Windows, OS X and the web.

Test your app

Testing is an iterative process and a critical step in building your app. The results of testing will determine whether you to repeat another cycle of the design process before moving on to the 'Deploy' step.

Once you've finished planning, the next step is to build your custom app.

Read the complete guide to creating your custom app to learn more.

[Download eBook](#)

DIY or hire an expert?

Many FileMaker customers build their apps without any programming experience. We call them “Citizen Developers.” However you might prefer to partner with a FileMaker Business Alliance consultant to get your app created even faster, drawing on their extensive experience with the FileMaker Platform.

Or you might want to take a blended approach by hiring a coach to help you get started.

Whether you do it yourself or hire help, the FileMaker Community is here to ensure your success.

What's the best approach for you?



Do it Yourself

Start developing on your own. We have resources to help you:

- The FileMaker.com learning site connects you to training series, online and in-person classes, webinars, discussions, videos and tutorials.
www.filemaker.com/learning
- The official FileMaker Community connects you with other FileMaker users and experts. Get answers to your questions, watch videos, access technical briefs, how-to articles, white papers, and more.
community.filemaker.com
- The FileMaker.com support site provides product documentation, knowledge base articles, help with purchasing decisions, and installation guides:
www.filemaker.com/support



Hire a FileMaker Business Alliance Partner

Certified third-party consultants offer a range of services and can be brought in at anytime and at any stage of the process.

developer.filemaker.com/search



Work with a Coach

Combine your resources and the expertise of a consultant for a blended approach.

Are you a Citizen Developer?

A recent poll of FileMaker customers found that 82% built their custom app in-house, and of those, 52% built their app in less than 3 months.

Take this quiz to find out.

Is DIY right for you?

Let's have a closer look by exploring these questions.

- Yes** **No** I have experience with Excel macros or other advanced spreadsheet functions.
- Yes** **No** I have created a web page or coded in HTML.
- Yes** **No** I enjoy the challenge of working with new apps.
- Yes** **No** I like trying out new gadgets.
- Yes** **No** I would describe myself as tech savvy.

Do you have time to DIY?

Just because you can do it doesn't mean you should.

- Yes** **No** I can find time to tackle extra projects on my own.
- Yes** **No** I am able to block out time for training online or in person.
- Yes** **No** I have reviewed the Plan, Create, Deploy Guides and am ready to get started.
- Yes** **No** I can make time to create, test, deploy and update my custom app.

Count your points!

Give yourself a point for every "YES" answer.

7-9 Points You have the skills, mindset and time to make your custom app a reality. [Get started today!](#)

4-6 Points You have the skills, but be sure to set aside time for training and development. Start by mastering the [Plan, Create, Deploy Custom App Success](#) guides.

1-3 Points Anyone can learn how to create apps in FileMaker, but be sure you have the support you need to be successful. Some first-time developers benefit from hourly help from a FileMaker Business Alliance partner. [Contact sales](#) to learn more about bundles that give you a jump start with help from an expert FileMaker developer.



The final step is to share your custom app with your anxiously awaiting technicians, dispatchers, and managers.

Read the complete guide to deploying your custom app to learn more.

Download eBook

Deploy your custom app

Host your app

Whether you host your app on an internal machine running FileMaker Server or partner with a third-party hosting provider, your hosted file will be able to be securely accessed by your team via iPhone, iPad, Mac, Windows or the web.

Decide what to buy

Determine how many users will need access to the custom app and purchase the appropriate FileMaker Licensing for Teams tier. FileMaker Go for iOS is available free from the [iTunes App Store](#).

Determine deployment methods

You can decide to go with a one machine or two machine method and also specify authentication methods and install SSL certificates at this point.

Determine backup strategy

Backing up data is critical. You can schedule automatic backups every 24 hours, progressive backups at any interval you prefer, or use third-party backup software.

Plan for disaster recovery

A standby server is a recent copy of your FileMaker Server files that is ready to be deployed in its place in the event of a hardware or software failure.

The FileMaker Platform

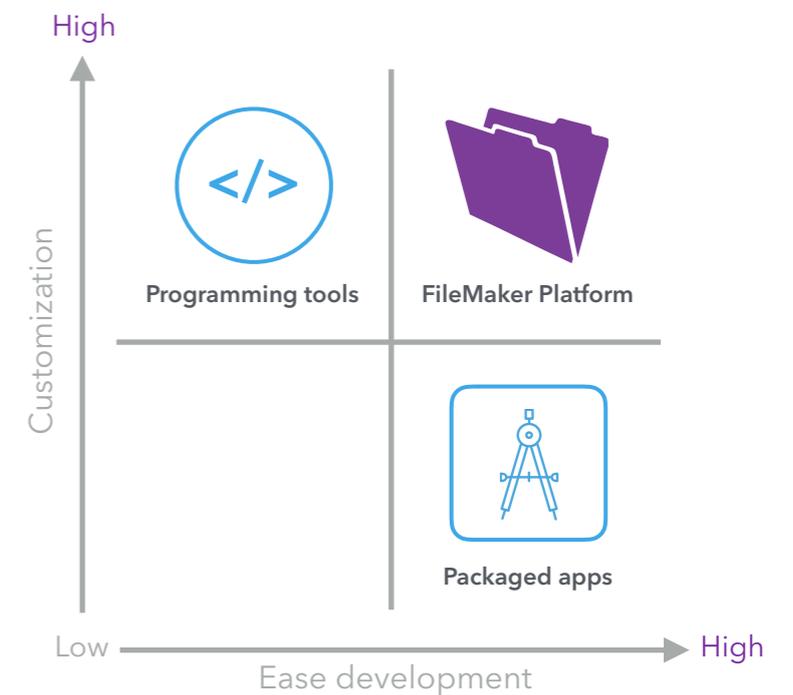
The FileMaker Platform is simply powerful software for creating custom apps that work seamlessly across iPad, iPhone, Windows, Mac, and the web.

Why FileMaker?

Unlike packaged apps or programming tools, [custom apps](#) meet the unique needs of small and large teams, helping to transform their businesses.

Anyone can create a custom app using the FileMaker Platform. Make your own app even without extensive development experience or IT skills.

It's easy and affordable to get started – so you can immediately see the results.



[View overview video](#)



[See how the FileMaker Platform works](#)

MORE RESOURCES FOR YOU:



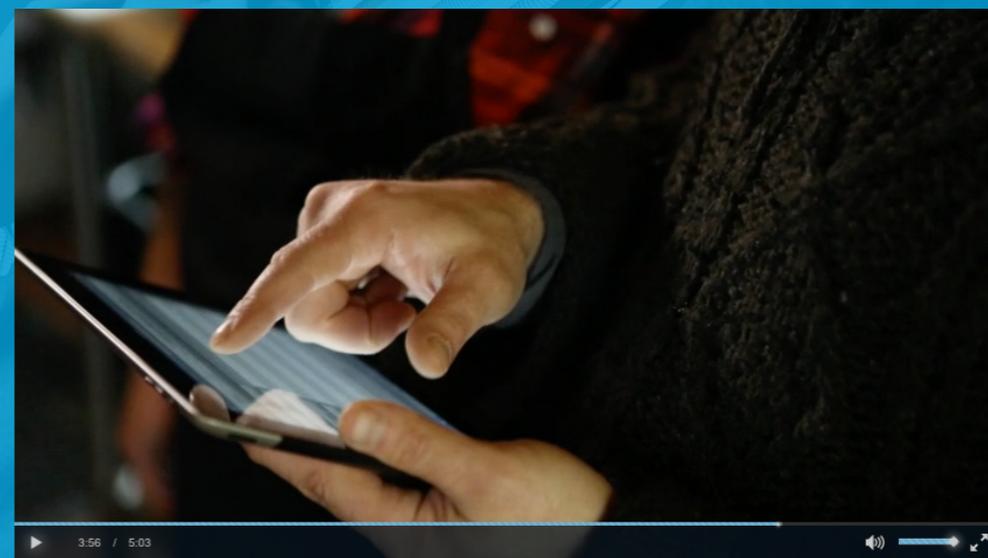
Download free trial

State of the Custom App Report



A survey of custom app usage and results

Download free report



View videos



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Transform Your Business



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