



# ***Certification Standards for Sbusiness and Management***

***Sydney  
27 March 2007***

**Service Strategies Corporation**

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# Agenda

- Organizational Certification Overview
  - Need for Industry Standards
- Management Certification
  - Field Service Manager

# Why are Standards Needed?

- Provide benchmark guidelines for the industry
- Enable measurement of service quality
- Focus organizations on Process and Results
- Create an environment of continuous improvement
- Provide recognition for exceptional service

# Defining an Industry Standard

- Service Strategies and a consortium of leading technology companies started the standards initiative
- Approximately 50 leading service organizations from around the world helped create the programs
- AFSMI Participation and Endorsement of the Standards



# Broad Industry Representation

## Service Segments

- Complex Support
- Hardware Services
- Outsource Services
- Automation Vendors
- Consumer Service & Support
- Vertical Application
- IT Help Desk Operations

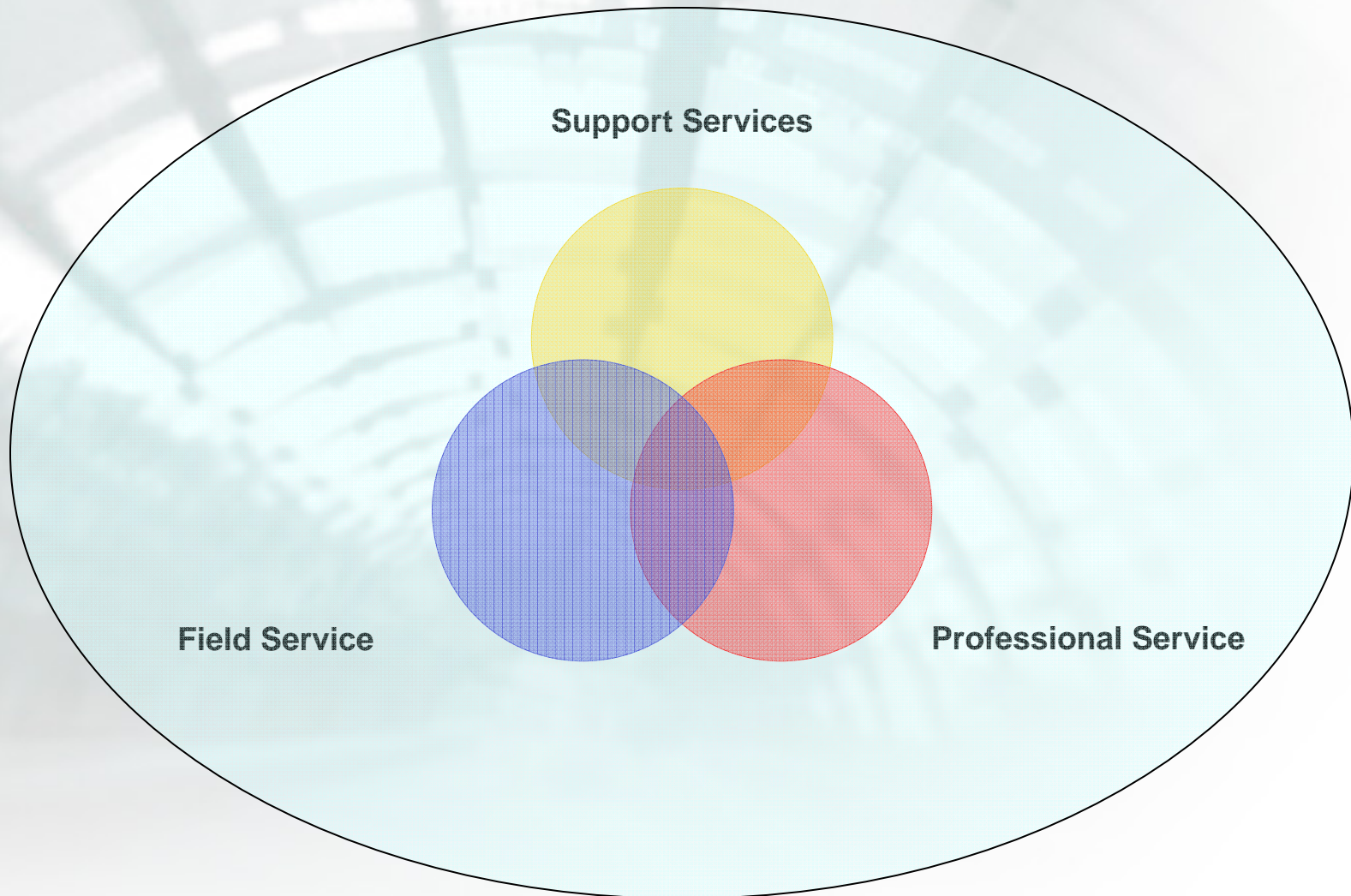
## Industry Segments

- Telecommunications
- Information Technology
- Industrial Automation
- Financial Services
- Energy Services
- Security
- Storage
- Medical

# What's the Program All About?

- Industry driven service capability & performance standard
- Analysis & improvement of business practices
- Comprehensive on-site audits to verify results
- Feedback on best practices from auditors
- Defines over 100 service business factors
- Customer focused factors have the greatest impact
- Measured results are the basis for certification
- Annual recertification ensures consistency

# Service Capability & Performance Model



# Support Center Practices (SCP)

- Designed for organizations that deliver remote support services such as...
  - Telephone Technical Support
  - Online Support Services
  - Proactive Support Services
  
- Proven standard used in over 20 countries worldwide
- Over 200 support organizations participating
- Over 100 certified support centers worldwide
- Eighth generation certification standard





# Globally Accepted Standard



best

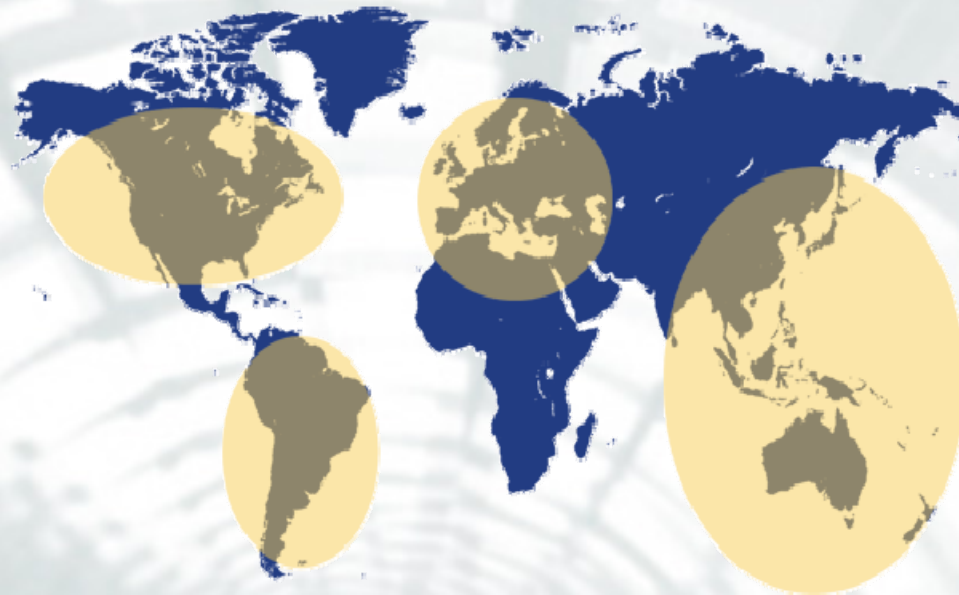
COGNOS

EMC<sup>2</sup>

Network Appliance

MCKESSON  
Empowering Healthcare

Novell.



LOCKHEED MARTIN

WIND RIVER

Mentor  
Graphics

aspentech  
process. to the power of e.

NOKIA  
CONNECTING PEOPLE

Rockwell  
Automation

SOFTWARE AG

Teradata  
a division of NCR

# Field Service Practices (FSP)

- Designed for organizations that deliver onsite support services such as...
  - Field Technical Support
  - Break/Fix Services
  - Onsite Maintenance Services
  
- Newly developed standard launched May 2005
  
- Initial audits completed for Q3 2006



# Professional Service Practices (PSP)

- Designed for organizations that deliver onsite support services such as...
  - Product Implementations
  - System Integration
  - Product or Services Consulting
  
- Newly developed standard launched May 2005
  
- IBM/FileNet Corporation first certified March 2006.



# Original Sponsor Companies: Field / Professional Service Standards



# Program Criteria



# Certification Process

*The Value From Certification is in the Journey!*

1. —————> **Enroll in Program, Complete Self-Assessment**

2. —————> **Gap Analysis of Process vs. Standards**

3. —————> **Complete Preparation / Undergo Audit**

4. —————> **Continuous Improvement / Recertify**

**Successful Audit Results in  
SCP, FSP, PSP Certification**

**Annual Recertification  
Ensures Consistency**

**Management Certification**

**Field Service Manager**



# **AFSMI & Service Strategies**

Formal agreement between AFSMI and Service Strategies Corp.

- Service Strategies delivers the training and proctor tests
- AFSMI provides the accreditation to students that complete the program and pass the exam



## **Collaborative Development**

### **Field Service Industry Practitioners**

- **AFSMI Management Members**
  - 75 Managers and Executives
  - 64 Companies
  - Global Representation
- **Field Services Practices (FSP) Certification Auditors**

## Topics for CFSM Inclusion

- Initial AFSMI input
  - Received 91 recommended elements and topics
- Rated each element on 1-5 scale
  - 126 AFSMI member responses to element weighting survey
- Focus Group Meeting
  - 18 Industry Executives
  - Categorized and Prioritized Elements
  - Agreed on target audience & CFSM course format

# Companies Participating in CFSM Development

Agfa Corporation  
Alcatel Netherlands BV  
Aramark Healthcare  
Aristocrat  
BioTek Instrumentns  
Bose Corporation  
Canon Europe Ltd  
Cardinal Health  
CVS Pharmacy  
De La Rue Cash Systems  
Diebold, Inc  
Digirad  
Eastman Kodak Company  
Eclipse, Inc  
EDS  
Elekta AB  
Epson America, Inc.  
Equant  
FUJIFILM Medical Systems  
USA, Inc.  
Fujitsu  
GBC

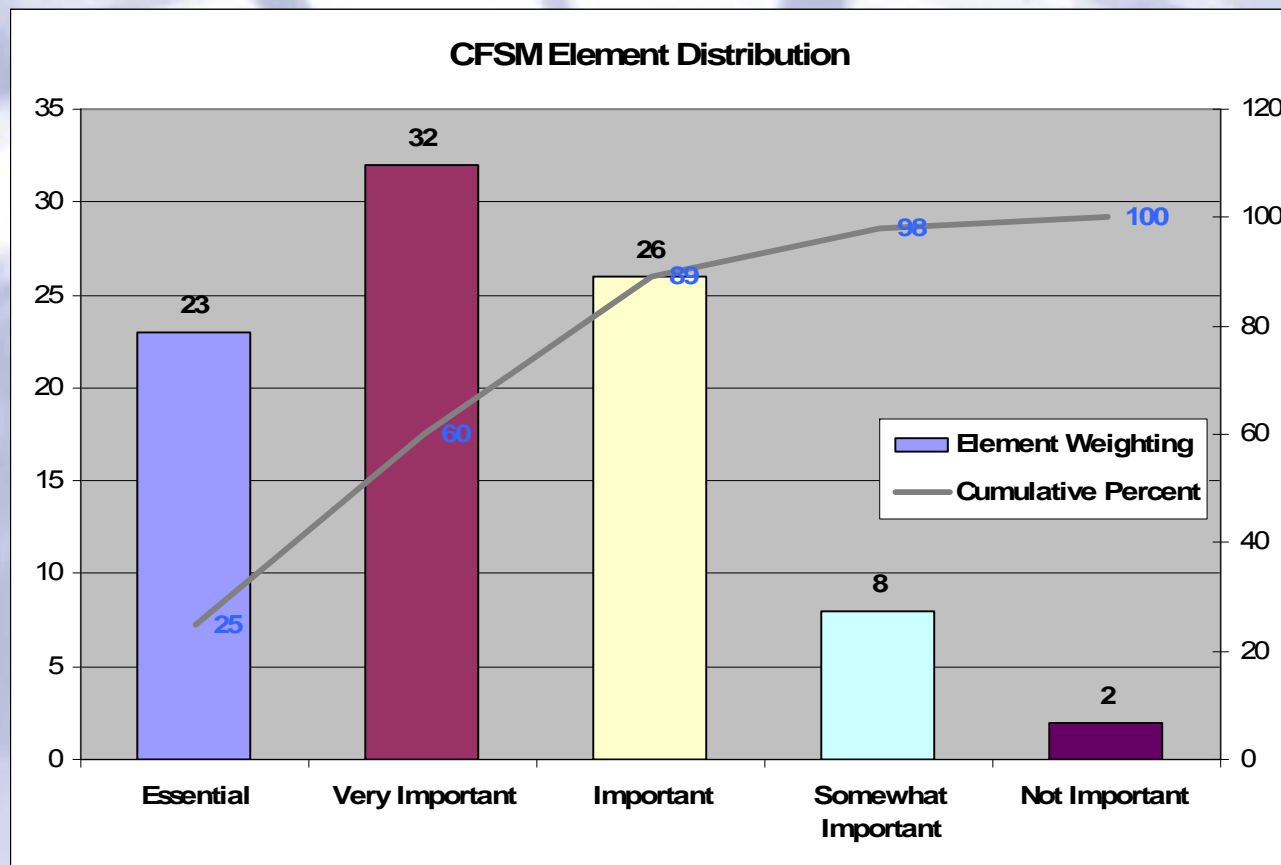
Harris Corporation  
Henry Schein Ash Arcona  
Hitachi Data Systems  
IDX/GE Healthcare  
IER Inc  
Instron Corp.  
ISR  
Kamstrup A/S  
KonicaMinolta BT  
Kronos Inc  
Leica Microsystems, Inc.  
Life fitness  
LPA Systems  
M.S.O.- Multi Micro Service  
organization B.V.  
MainStream Management LLC  
METTLER TOLEDO  
Millipore  
Msg Networks  
Neopost Technologies  
NRG Group  
Oracle

Partsearch Technologies  
Peak Technologies  
Philips Electronics Ltd.  
Presstek  
Printrak  
Radiant Systems  
RF Technologies, Inc.  
Service Consulting  
Siemens  
SITA  
STERIS  
Stryker Medical  
TELUS  
Thermo Electron  
Toshiba America Medical  
Systems, Inc.  
Transcat Inc.  
Umoe IKT AS  
UNISYS  
Unisys Corporation  
Vutek  
Xerox Corporation

Final membership input consisted of 91 potential course elements rated according to importance by 126 member-participants.

1. CUSTOMER FOCUS, SATISFACTION & LOYALTY						
	Not Important	Somewhat Important	Important	Very Important	Essential	Response Average
Coaching customer satisfaction skills and behaviors	0% (0)	5% (6)	10% (13)	32% (40)	53% (66)	4.33
Customer Loyalty	1% (1)	3% (4)	18% (22)	44% (55)	34% (43)	4.08
Customer Satisfaction and Loyalty measurement	1% (1)	3% (4)	16% (20)	42% (52)	38% (48)	4.14
Customer Satisfaction training	1% (1)	6% (7)	30% (38)	39% (49)	24% (30)	3.8
How to manage/influence customer perception	0% (0)	4% (5)	15% (19)	39% (49)	42% (52)	4.18
Identify important characteristics of customer satisfaction survey and know how to avoid the most common pitfalls	1% (1)	10% (13)	35% (43)	35% (43)	19% (24)	3.61
Implementing a useful customer loyalty index	3% (4)	15% (18)	36% (45)	34% (42)	12% (15)	3.37
Understand customer satisfaction and loyalty	2% (3)	2% (3)	22% (27)	38% (48)	35% (44)	4.02
Understand how frequent or lack of communications can affect customer satisfaction	2% (3)	1% (1)	19% (24)	38% (48)	39% (49)	4.11
<b>Total Respondents</b>						<b>126</b>

These results were stacked ranked and color coded to prioritize the objectives for each course element.



4.00 - 4.34	Essential very
3.67 - 4.00	Important
3.34 - 3.67	Important Somewhat
3.00 - 3.34	Important
2.67 - 3.00	NOT Important

## CFSM Inclusion of Requested Elements

- Essential 92%
- Very Important 91%
- Important 77%
- Somewhat Important 50%
- Not Important 0%

## Curriculum Focus

- First Full Day . . .
  - “How to Think About the business of Field Service.”
- Next Three Days . . .
  - “How to Manage the business of Field Service”

## Day One:

9:00 am	Orientation and Introductions
10:00 am	Module 1: Managerial Leadership and Behavior
10:15 am	Pre-reading Quiz and discussion
11:30 am	Lunch
12:30 pm	“Win As Much As You Can” Behavior Simulation
1:30 pm	Management vs. Leadership
2:00 pm	Break
2:15 pm	Values and Reciprocal Trust
3:30 pm	Module 2: Understanding the Service Product
4:15 pm	Module 3: Managing Strategically at the Field Service Level (Part A)
4:45 pm	Review Modules 1-2
5:00 pm	Homework Assignment and Wrap Up



## Day Two:

8:00 am	Module 3: Managing Strategically at the Field Service
9:00 am	Team Strategy Analysis Exercise
9:45 am	Strategy Analysis Exercise Presentations
10:00 am	Module 4: Inventory Planning and Management
11:00 am	Team Inventory Exercise
11:30 am	Lunch
12:30 pm	Inventory Exercise Results Review
12:45 pm	Module 5: Customer Satisfaction and Loyalty
2:00 pm	Survey Question Exercise
2:45 pm	Survey Question Presentation
3:00 pm	Decoding Customer Satisfaction Survey Data
3:45 pm	Module 6: Management Operations Analysis
4:30 pm	Review Modules 3-6
5:00 pm	Homework assignment and Wrap Up

## Day Three:

8:00 am	Case Study Exercise
9:30 am	Break
9:45 am	Case Study Presentations
10:15 am	Module 7: Decision Making for Field Service
11:15 am	Multi-Criteria Decision Exercise
11:45 am	Lunch
12:45 pm	Decision Exercise Results Discussion
1:00 pm	Module 8: Staffing and Resource Planning
2:00 pm	Applications for Field Service Staffing
3:00 pm	Break
3:15 pm	Module 9: Performance Measurement and Metrics
3:45pm	Balance Score Card Exercise
4:15 pm	Balance Score Card Results Discussion
4:35 pm	Review Modules 7-9
5:00 pm	Homework Assignment and Wrap Up

## Day Four:

8:00 am	Module 10: Coaching and Performance Improvement
9:00 am	The Practical Coach - Video
9:30 am	Break
9:45 am	Module 11: Hiring for Field Service
10:30 am	Behavioral Interviewing Team Exercise
10:45 am	Module 12: Training and Career Development Plans
11:30 am	Lunch
11:25 am	Training Objectives Presentations
12:30 am	Module 13: Revenue, Profit and Capital Budgeting for Field Service
1:00 pm	Capital Budgeting
1:30 pm	Module 14: Distance Management for Field Service
3:15 pm	Break
3:30 pm	Review Modules 10-14 and General Review for Exam
5:00 pm	Wrap Up

## Day Five:

8:30 am	Final Exam
11:00 am	Discussion on Learning Application Activity (Post-Course)
12:00 pm	Course Evaluation and Departure

## **Certification Elements**

- Pre-class Reading and Quiz – 10%
- Case Study Project – 5%
- Participation – 15%
- Post-class Exercise - Planning Document Completion – 5%
- Last Day Exam – 65%

**Certification Is Issued Upon Achievement of a 70% average score in the total of these elements.**

# **Class Schedule and Registration**

Sydney in Summer'07

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# Any Questions ?

**Service Strategies in partnership  
with AFSMI will support your Local  
Chapter events and provide  
member discounts for Field Service  
Manager Certification**



# Career Certification for Support Center Staff

*Training and testing to validate skills for  
all levels within the Support Center*

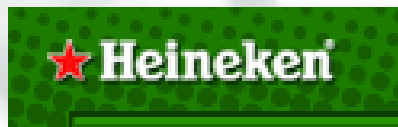
- CSM – Certified Support Manager
- CSup – Certified Support Supervisor
- CSS – Certified Support Specialist
- CSP – Certified Support Professional
- CSR – Certified Customer Service Rep.



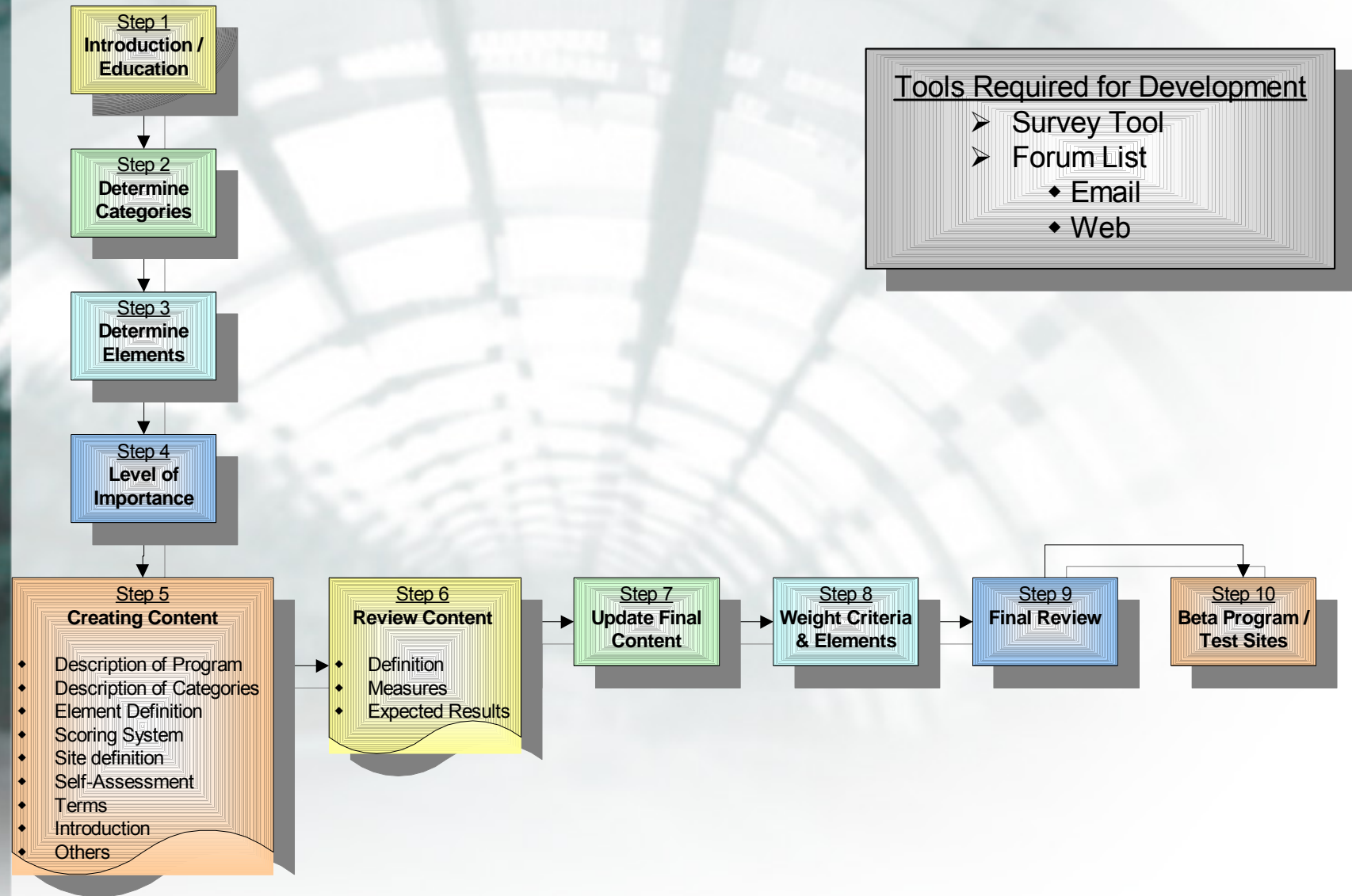
# EMEA Review Process

- Globalization of Standards
- EMEA sponsor and steering committee formed
- Two meetings held so far to review and update standard
  - Ensure it includes any additional European requirements

# EMEA Steering Committee

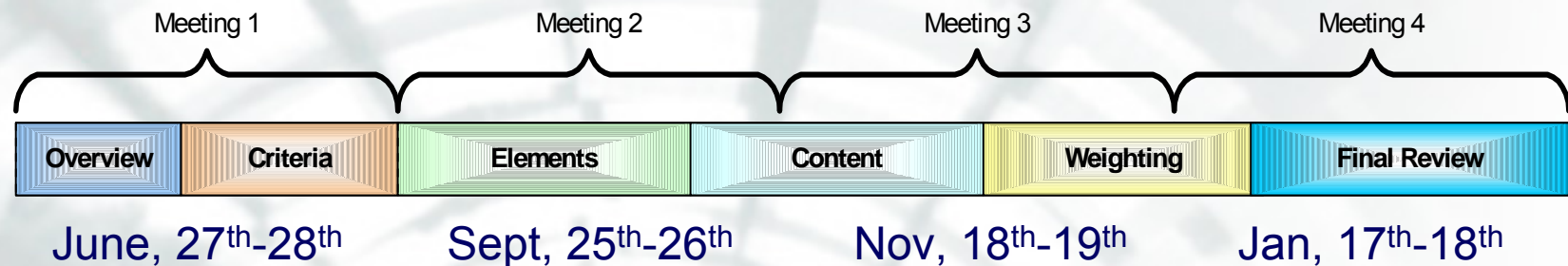


# Initial Development Approach



# Schedule 2006-2007

## Complete Q1 2007



- ▶ Interim web and phone conference meetings to review feedback
- ▶ Email and web forums as required