



The No-Nonsense Guide to **Switching** Field Service Software

What to expect, how to prepare, and why it's less painful than you think

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Introduction: If you've been putting this off, **you're not alone**

Switching field service software is one of those decisions that's easy to delay. There's always a reason to wait: a busy period, a team change, a new contract just signed. And the longer you wait, the more the current system becomes the path of least resistance, even when everyone knows it isn't really working.

If that sounds familiar, you're in good company. Almost every operations manager we speak to tells us the same thing: they knew for a long time before they did anything about it.

This guide isn't here to push you into anything. It's here to give you a clear, honest picture of what switching actually looks like - what's involved, what to expect, and how to bring your team with you. Because most of the things that hold businesses back from making the move turn out to be based on assumptions, not reality.

"If Service Geeni was taken away tomorrow, we'd certainly be slower to respond. We'd have less time to update and communicate effectively with customers, it would mean we were back to manual. It's an integral part of our operations."

- Paul Kelly, Operations Director, Abbey



Section 1: How Do You Know It's Time to Switch?

Signs your current software is holding you back

Most operations managers don't wake up one morning and decide to change their field service software. It's more gradual than that. A frustration here, a workaround there. A spreadsheet that started as a temporary fix and somehow became permanent. A report that takes half a day to pull together because the system can't do it automatically.

The signs are usually there long before anyone does anything about them. And by the time switching feels urgent, the cost of staying put has already been mounting for months, or years.

So how do you know when it's genuinely time to make the move? Here are the most common signals we hear from operations teams who came to us after putting it off for too long.

Your engineers are calling the office for information they should already have. Job history, parts availability, site access notes, previous visit details. If your engineers are picking up the phone before they can get started, something isn't working. That's not just frustrating for your office staff. It's dead time on every single job.

Invoices are going out late, or not at all. If there's a gap between a job closing and an invoice being raised, you're effectively giving your customers an interest-free loan. In a business running hundreds of jobs a month, even a few days' delay adds up fast. And missed invoices are more common than most businesses like to admit.

PPM schedules live in someone's head, or a spreadsheet. Planned preventive maintenance only works if it actually happens. If your scheduling relies on a person remembering, a calendar reminder, or a spreadsheet that hasn't been updated in three months, you're one busy period away from something slipping through the cracks.

You can't see an asset's full history without digging. A customer calls to query a repair. An engineer needs to know what was done on their last visit. A manager wants to understand why a particular piece of equipment keeps failing. If the answer involves opening filing cabinets, scrolling through email threads, or asking someone who was there at the time, your data isn't working for you.

Stock runs out before anyone noticed it was low. Parts and stock management works invisibly when it's right, and causes chaos when it's wrong. If your engineers are arriving on-site without the parts they need, or your team is placing emergency orders that could have been avoided, the visibility isn't there.

Reporting takes hours, not minutes. If producing a weekly or monthly performance report is a manual exercise involving exports, copy-pasting, and formatting in Excel, you're spending time creating information that should already exist. Good software doesn't just store data. It surfaces it when you need it.

Your software can't keep up as you grow. Adding a new engineer, opening a new site, taking on a new customer. These things should be straightforward. If every step of growth creates a new administrative headache, your software is a ceiling, not a foundation.

You've built your processes around your software's limitations. This one is easy to miss, because it happens so gradually. But if your team has developed workarounds, manual steps, or unofficial systems to compensate for things your software can't do, you're not using software to support your operation. You're managing your operation around your software's shortcomings.

If you're recognising two or three of these, or more, the question probably isn't whether to switch. It's how to do it without disrupting the business you've worked hard to build.

That's exactly what the rest of this guide is here to help with.



Section 2: The Real Cost of Staying Put

What inaction is actually costing you

There's a common assumption that doing nothing is the safe option. Change carries risk, so standing still feels like risk management. But when it comes to software that isn't working, standing still has a cost of its own. It's just harder to see on a spreadsheet.

Here's what it tends to look like in practice.

Every repeat visit is a direct loss. When an engineer attends a job without the right information, or without the right parts, and has to come back, that's two visits billed one job. Two lots of travel time, two slots in the schedule, and a customer experience that suffers. With full asset history and parts visibility at their fingertips, engineers fix more jobs first time. Without it, repeat visits become a quiet but expensive habit.

Late invoicing means slow cash flow. The average field service business isn't losing revenue. It's delaying it. Jobs that close on a Friday but aren't invoiced until the following week, or the week after, create a cash flow gap that compounds over time. Businesses running hundreds of jobs a month can recover significant cash simply by closing that gap.



Missed PPM creates reactive costs. A planned maintenance visit that gets overlooked means a piece of equipment running without servicing until something goes wrong. Emergency callouts cost more to run than planned maintenance, take up unscheduled engineer time, and often result in unhappy customers who expected the problem to be prevented, not fixed after the fact.

Manual reporting is an invisible tax on your management time. Time spent extracting and formatting data is time not spent running the business. For a service manager doing this weekly, that's easily two to four hours a week - over 100 hours a year - spent on administration that good software would handle automatically.

The compound effect. None of these costs is catastrophic on its own. But taken together, across a full year, they represent a significant amount of lost revenue, wasted time, and unnecessary operational friction. The businesses that make the switch rarely struggle to calculate the return on investment, because the savings tend to show up almost immediately.

The question worth asking isn't what will switching cost? It's what is staying put costing me right now?

"Service Geeni speeds everything up. Our engineers just type in the notes, and the billing is all done through Service Geeni. We get paid quicker too - they pay us automatically now through the system - there is no need for human intervention."

- Jo, Small Works Co-ordinator



Section 3: What Switching Actually Looks Like

A step-by-step walkthrough, no surprises

The fear of switching usually comes down to the unknown. What will happen to our data? How long will it take? Will the team cope? What if something goes wrong during go-live?

These are all reasonable questions, and they all have straightforward answers — because a well-run implementation follows a clear, structured process. Here's what that looks like.

Step 1: Discovery and scoping

Before anything is configured or built, the implementation team takes time to understand how your business actually works. Your job types, asset structures, billing rules, workflows, integrations with your accounts package - all of it. Nothing is assumed. The platform is set up to reflect your operation, not the other way around.

This stage is also where you agree on scope, timelines, and what a successful go-live looks like. You should leave this stage with a clear picture of what's happening and when.



Step 2: Data migration

Your existing data - customers, sites, contacts, equipment, asset history, service contracts, stock, job details - is migrated across to the new system. This is the stage that worries most people, so it's worth understanding exactly how it works.

You stay in control of your data throughout. The implementation team provides structured templates for each data type, walks you through how they map into the new platform, and answers any questions about structure and what's worth bringing across.

Once your data is prepared, you use a self-serve import tool to upload it. The tool runs validation checks before anything goes live, flagging errors or missing information so you can fix them first. You can run as many test imports as you need, and nothing is finalised until you're completely satisfied. Before go-live, a final data cleanse removes any test data so you start with a clean, accurate system.

Step 3: Configuration and setup

The platform is configured around your workflows: job forms, PPM schedules, pricing rules, engineer profiles, customer records, stock setup. Integrations with your accounts software or ERP are built and tested at this stage.

This is also when you start to see your operation taking shape inside the new system, which is often the point where any remaining uncertainty starts to give way to confidence.



Step 4: Training

Training is role-specific and practical. Office staff, planners, and managers learn the platform from the perspective of their day-to-day work. Engineers are trained on the mobile app, which is designed to be straightforward and works offline, so connectivity on-site isn't a barrier.

You don't need to train everyone on everything. The goal is that every person in your team can do their job from day one, not that they know every feature in the system.



Step 5: Go-live

Go-live happens with your real data in place and your implementation team on hand. This isn't the point where you're handed the keys and left to it. It's a supported transition, with help available throughout the day.

Most businesses find go-live itself is less eventful than they anticipated. The preparation that goes in beforehand is precisely what makes that possible.



Step 6: Ongoing support

Implementation doesn't end at go-live. You'll have a dedicated customer success representative, a knowledge base of how-to guides and videos, and a support team that responds fast.

- 100% of support issues responded to within 30 minutes
- 100% of major issues resolved within 60 minutes
- Over 200 support tickets resolved every week

"Service Geeni provides a first-class service all of the time and we could not be happier. Whenever we have a question the team are very helpful, giving a simple and clear explanation and always a solution that fits our business."

- Director, Compact Fork Trucks Ltd



Section 4: Getting Your Engineers On Board

Your engineers will surprise you

Of all the concerns that come up when a business is considering new software, engineer adoption is usually near the top. And it's understandable. Experienced engineers have their ways of working, they're busy, and they didn't ask for a new system.

But here's what we consistently see in practice: engineers are often the quickest to come around, once they see what the mobile app actually does for them.

What's in it for them?

Before the switch, engineers typically spend a portion of every job doing things that aren't engineering: calling the office for job details, filling in paper forms, trying to remember what was done on the last visit.

The mobile app removes most of that friction.

Job details, asset history, parts availability, risk assessments, customer notes — all of it is there before they arrive on site. Forms are completed digitally on the job, not transcribed back at the office later.

Less time on the phone. Less paperwork. More time actually doing the job. That's a straightforward win for most engineers.

How to bring them with you

The most effective approach is to involve one or two key engineers early, ideally people who are respected by their colleagues and open to new ideas.

When those engineers come back from training and say it's straightforward, or that they can see how it'll make their day easier, the rest of the team listens. Peer credibility in the workshop is worth more than any top-down instruction.

Training is hands-on and focused on what's relevant to each role. Engineers learn the mobile app and don't need to understand the finance module or the reporting suite. Keep it simple, keep it practical, and let the tool do the talking.

What about the sceptics?

Every team has them. The engineer who's been doing it the same way for 20 years and sees no reason to change.

The best approach isn't to argue. It's to give them a real scenario where the new system would have helped: a repeat visit that could have been avoided, a part that was missing because no one got the reorder alert, a customer query that took 20 minutes to answer because the history wasn't accessible.

The sceptics usually come around. It just sometimes takes a few weeks of actually using the system before they'll admit it.

"We are heavily KPI'd with our client, so Service Geeni helps us to monitor our performance and know immediately whether we are on track or not. This is easy to track because the engineers can log on as soon as they arrive on location. We didn't have that sort of visibility before."

- James, Estimator, Arden Construction



Section 5: What Happens to Your Data

Your data is safe, and it comes with you

Data is often the thing people worry about most, and it's one of the areas where there's the biggest gap between expectation and reality.

The expectation: migration will be complicated, something important will get lost, and the team will spend months cleaning up the mess.

The reality: with a structured process and the right guidance, data migration is methodical, controlled, and for most businesses, an opportunity to start with cleaner data than they've ever had.

What comes across

Standard migration covers the core operational data your business runs on day-to-day:

- Customer accounts and sites
- Contacts
- Equipment and asset records, including warranties
- Stock parts and on-hand values
- Service contracts, PPM schedules, and job details

You stay in control throughout

The approach is deliberately customer-led. The implementation team provides structured templates for each data type and walks you through how your existing data maps into the new platform. You populate the templates, which means you're making the decisions about what comes across and how it's structured, rather than leaving it to someone else to interpret.



Test before you commit

Once your data is prepared, you upload it using a self-serve import tool that runs validation checks before anything is confirmed. It tells you exactly what needs correcting, and you can run as many test cycles as you need. Nothing goes live until you're satisfied it's right.

A useful side effect

The process of preparing your data for migration often surfaces things you didn't know were there: duplicate records, outdated contacts, equipment that's no longer in service. Most businesses find they arrive at go-live with a cleaner, better-structured dataset than they had before. Accurate data from day one means the system gives you better information from day one.



Section 6: Questions to Ask Any FSM Provider

Don't sign anything until you've asked these

Choosing a field service software provider is a significant decision, and a good provider will welcome tough questions. If anyone gets evasive or vague, that tells you something important.

Here's a checklist to take into any conversation:

About implementation:

- How long does implementation typically take for a business our size?
- Who manages data migration - us, you, or a combination?
- What does go-live support look like, and for how long after go-live is that support in place?
- Do you have a dedicated implementation team, or is it handled by the sales or support team?

About the product:

- Do you have customers in our industry? Can we speak to one?
- How often do you release product updates, and do they cost us anything extra?
- What integrations do you have with accounts software and ERP systems?
- What happens if we need something bespoke, such as a custom integration or a specific workflow?



About the commercial relationship:

- What's included in our contract, and what costs extra?
- Can we scale our plan up or down as the business changes?
- What does your typical customer look like after two or three years? Are they on the same plan, or have they grown into a higher tier?

About support:

- What does your ongoing support model look like after the first 90 days?
- What are your average response and resolution times?
- Is there a knowledge base or self-serve support available?

The one question most people forget to ask: What does your customer churn look like? A provider that's confident in their product and their service won't shy away from this. One that deflects or changes the subject probably should.



Section 7: Why the Right Partner Makes All the Difference

It's not just software - it's who's behind it

Two businesses can implement the same software and have completely different experiences, depending on who's guiding them through it.

The right implementation partner brings more than technical knowledge. They understand your industry, they ask the right questions about how your business actually works, and they're invested in the outcome beyond the contract signature. The wrong one completes the setup to spec, hands it over, and moves on.

At Service Geeni, we've been working with field service businesses for decades, across material handling, lifting and access, refrigeration, industrial manufacturing, facilities management, and more. The implementation team isn't learning your industry as they go. They've seen your challenges before, and they know what good looks like.

We're not the right fit for every business. But if you're managing assets, engineers, and complex job workflows in a service and maintenance operation, we'd genuinely like to show you what's possible.

"We chose Service Geeni because of their willingness to change and adapt to us. Service Geeni offered the best connection with SAP, as well as advanced service management features. Not everyone else could do that."

- Paul Henderson, Performance Excellence Manager, Habasit UK



Ready to see what switching could look like for **your business?**

Book a free, no-obligation demo. We'll show you the platform, answer your questions honestly, and give you a clear picture of what implementation would look like for a business like yours.

No pressure. No hard sell. Just a straightforward conversation.

Book your demo at servicegeeni.com >

Plans start from £40 per engineer, per month.



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