



Work Smarter, Not Harder

For the past decade, field technicians have been collecting critical on-site data through XOi. The word “data” in a field service context can take many forms — for our purposes, we’re talking about information from a job such as: age of equipment, make, model, serial number, equipment location, workflow steps taken to fix the issue, parts needed, parts broken, tools, additional equipment needed, hours taken to fix, cost, and so much more.

We’ve taken the time to analyze thousands of these particular data points to compile a comprehensive guide to working smarter, not harder on a jobsite and throughout your field service ecosystem. The purpose of this paper is to show you how extracting and analyzing data from the field informs super intelligent decisions for your business and customers.



WORK SMARTER

Automate your quote building process.

According to XOi's proprietary data, 78% of the time a technician requests a quote, they believe it is urgent, and a high priority. Using XOi, you can significantly reduce the time from quote requested to quote submission. By automating the technician's process on site, and extracting data for process improvement, you remove barriers in the quote request process, and increase efficiency by understanding trends and tendencies in your equipment universe.

Analyzing the data collected by technicians through XOi, we know this about the quoting process for additional work:

5.5% of the time, a crane is needed

5.5%

13% of the time, specialty tools or rental equipment is required

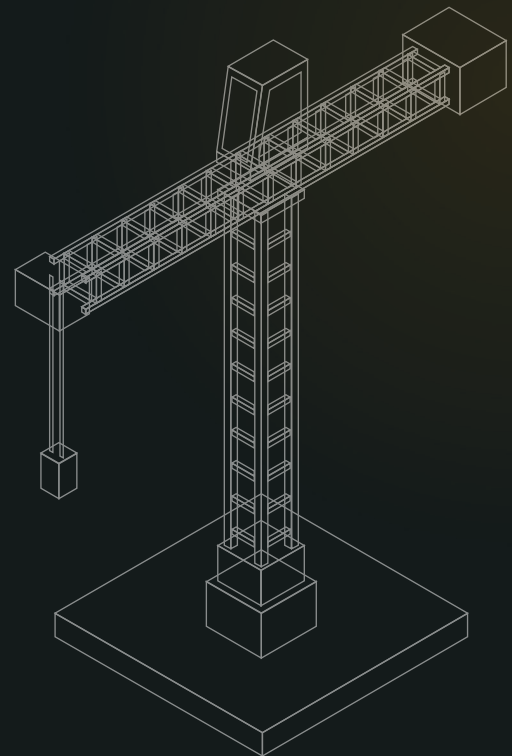
13%

14% of the time, the quote is for equipment replacement

14%

93% of the time, parts need to be sourced

93%



WORK SMARTER

Have proactive conversations with customers regarding efficiency, sustainability, work forecasting, and additional scopes of service on new contracts and renewals.

Over 17% of the time a technician performs a job, they find a recommendation to increase efficiency or extend the useful life of the equipment they are servicing. Having tangible evidence of this data streamlines the technician tasking process and provides an accessible customer deliverable. By easily extracting and understanding in-field data via XO*i*, you'll forecast additional work accurately with customer and equipment specificity to better sell, plan and execute contracts.

Analyzing the data collected by technicians through XO*i*, we know this about the PM and tasking process:

17%

of the time, during maintenance of a unit, additional work or a quote request opportunity is found

33%

of the time, the unit/system being serviced during a PM is R22

87%

of the time, the unit was operating on departure

33%

of the time, the unit does not show proper temperature drop



WORK SMARTER

Know what you're getting into with each service call, and streamline the technician response to create consistency on every job.

40% of the time a technician answers a service call, they find additional work is needed outside of what was originally quoted. Through XO*i*, before a technician even gets on site, they'll download manufacturer and component failure data to predict the root cause of the issue, understand which parts are needed, ensure proper inspection of heating/cooling elements based on the season, and know which technician is right for the job based on the model they work on most often.

Analyzing the data collected by technicians through XO*i*, we know this about service calls:

45% of the time, technicians say that the unit was not running on arrival

13.5% of the time, the root cause of the issue is airflow

12.5% of the time, the root cause of the issue is electrical

17% of the time, refrigerant is added on a service call



Analyzing the data collected by technicians through XO*i*, we know this about jobsite safety:

WORK SMARTER

Stop for a safety check.

According to data sourced from our customers, prior to using XO*i*, only 29% of service and maintenance calls saw a job hazard analysis completed. Without completing this type of analysis, technicians may not take the time to stop, think, and look at the job before starting. More so, they may be breaking safety compliance standards. With XO*i*, technicians complete safety checks and workflows to engage and re-engage on safety standards before, during, and after each service call. In addition, technicians digitally document jobsite concerns to help communicate and resolve any safety issues.

44%

of all jobs involve heights or need fall protection

7%

of technicians do not have knowledge of exit or egress on a job

1%

of technicians do not have tools or training to isolate power

1%

of technicians do not have appropriate PPE for the job



WORK SMARTER

Know the age of your equipment.

In a recent survey of contractors, we found that 43% of the group did not know the associated age/manufacturing year of more than 75% of their equipment. Without this information, these contractors will never be able to rise past the “vendor” role for their customers. XOi’s technology uncovers the age, make, and model of a unit, and if the unit is approaching end of life, a notification is delivered instantaneously. From the standpoint of a contractor, having this knowledge assists with their customer’s capital planning process. For OEMs, they now have an entire map of their universe of assets — spurring smart, proactive manufacturing decisions.

Analyzing the data collected by technicians through XOi, we know this about aging equipment:

Less than 5% of contractors are helping their customers with capital planning

<5%

16% of serviced units are determined to be end of life

16%

45% of end of life opportunities are captured between May and August

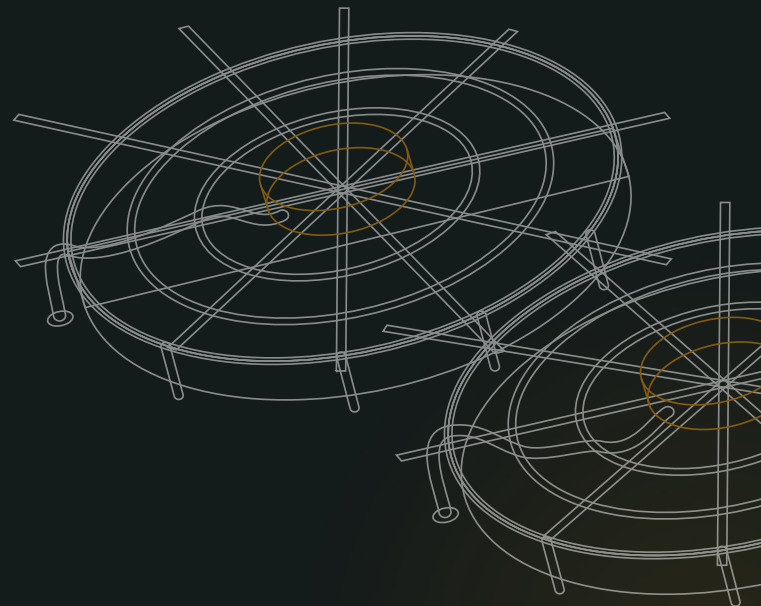
45%

43% of end of life opportunities are from a single manufacture

43%

From the contractor to the customer, XOi is the gateway between your equipment, your technicians, and your office. When you identify commonalities across the entire landscape of your business, you create well-rounded, smart technicians and save endless time, money, and resources.

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6