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Transforming Field Service with AI: Boost Efficiency, Proactive Maintenance, and Enhance Satisfaction

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Answer quiz for prizes!

Agenda

- Intro – 10 Mins
  Kahoot -
- Prompt Questions / Ideas –5 Mins
- Demo - How to CoPilot Create Prompts – 15 Mins
  - Dispatcher / Scheduler
  - Tech
- IOT Signal Chain - (Screen Shots) 15 Mins
- Demo / E-mail to Work Order Schedule Agent – 5 Mins
- Q/A – 5

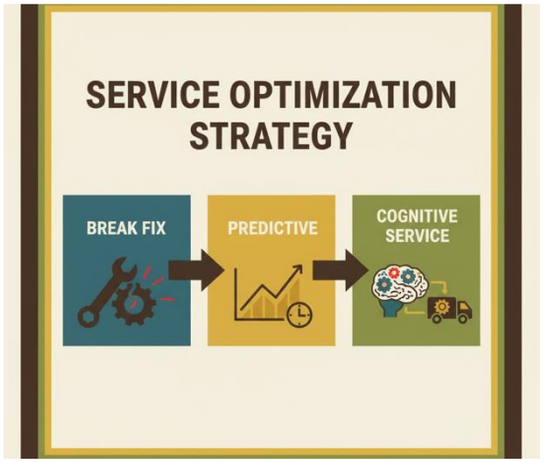
Session Objectives

What will you learn today?

- Understand the impact of AI on field service management and its potential benefits.
- Learn about the latest AI features and functionalities in Dynamics Field Service.
- Explore real-world case studies and success stories from industry partners.

What Is AI In Field Service?

The Top Uses Of AI In Service Business



From break-fix → predictive → cognitive service
Reduce downtime & cost/order; increase FTFR and CSAT
Modernize with AI + IoT + optimization across operations

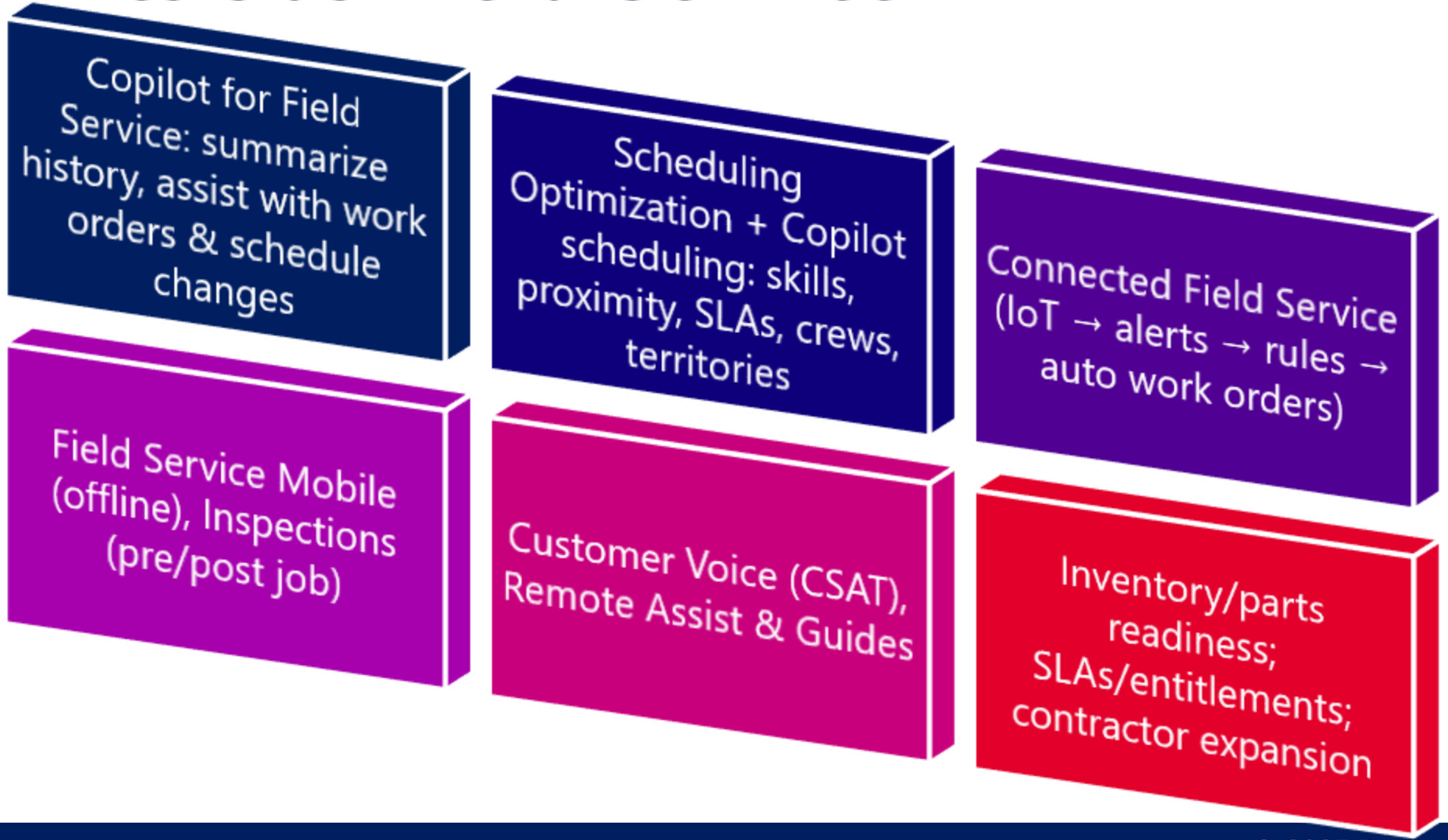
Intelligent Scheduling
Right technician
Right skills
Right parts
Right job
OPTIMAL TIME

Assist Technician & Diagnostics

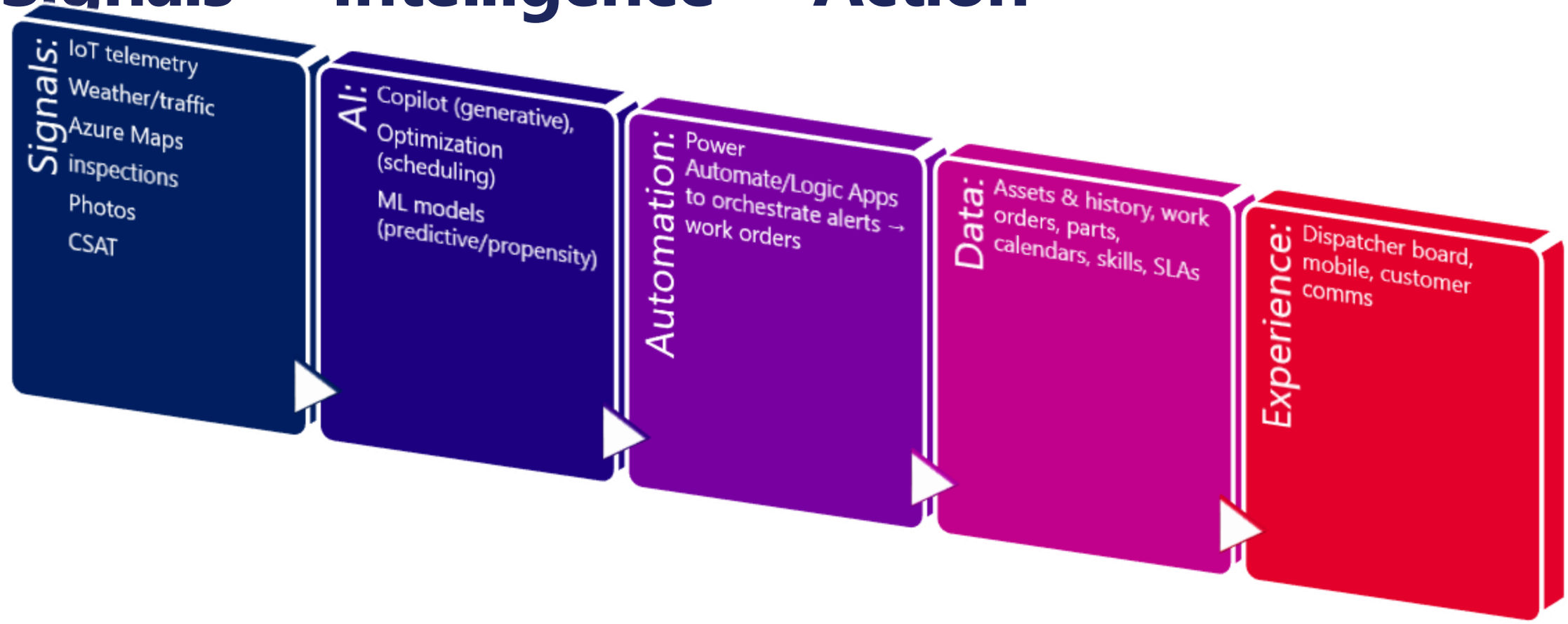
AI Components

Feature Name	Genuinely AI?	Notes/Comments
IoT Predictive Maintenance	Yes	Uses ML/AI models on device signals
RSO & AI Dispatch	Yes	AI for optimized scheduling
Copilot-Facilitated Assistance	Yes	Generative AI, LLM, NLU features
Work Order Automation	No*	Mostly logic workflows unless Copilot is layered in
Smart Reporting & Inventory AI	Yes	ML-driven insights, AI patterns
Incident/Alert Suggestions	Yes	AI-based recommendations
Autonomous Agents	Mixed	Only AI if Copilot/LLM “agentic” integrations used
Customer Notification Automation	No	Primarily rules/workflows
Skill-Based Recommendations	Mixed	AI if adaptive; workflow if static
Real-Time Optimization	Mixed	AI if adaptive models, else workflow

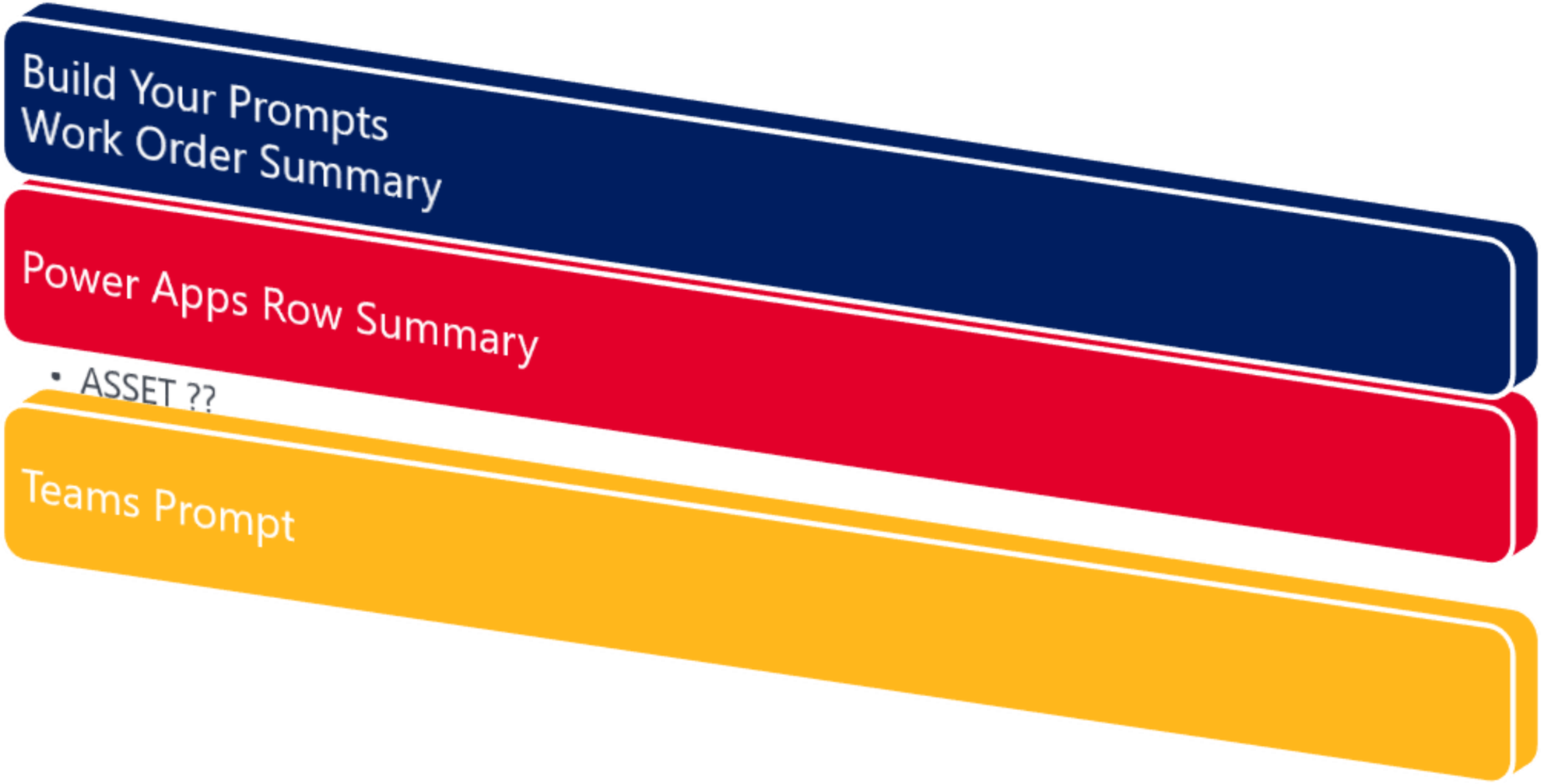
What's in the box: Dynamics 365 Field Service + AI



Architecture:
Signals → Intelligence → Action



Demo 1 – 15 Minutes



Work Order Summary - Demo

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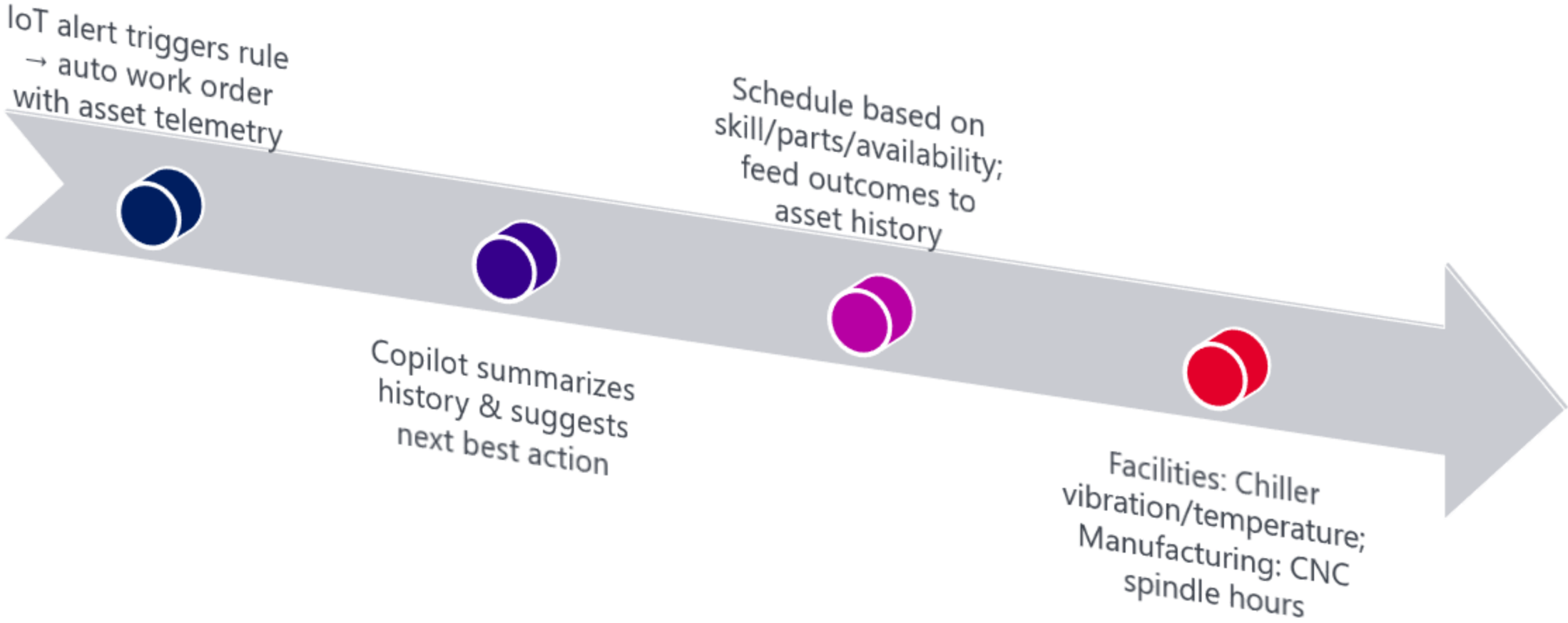
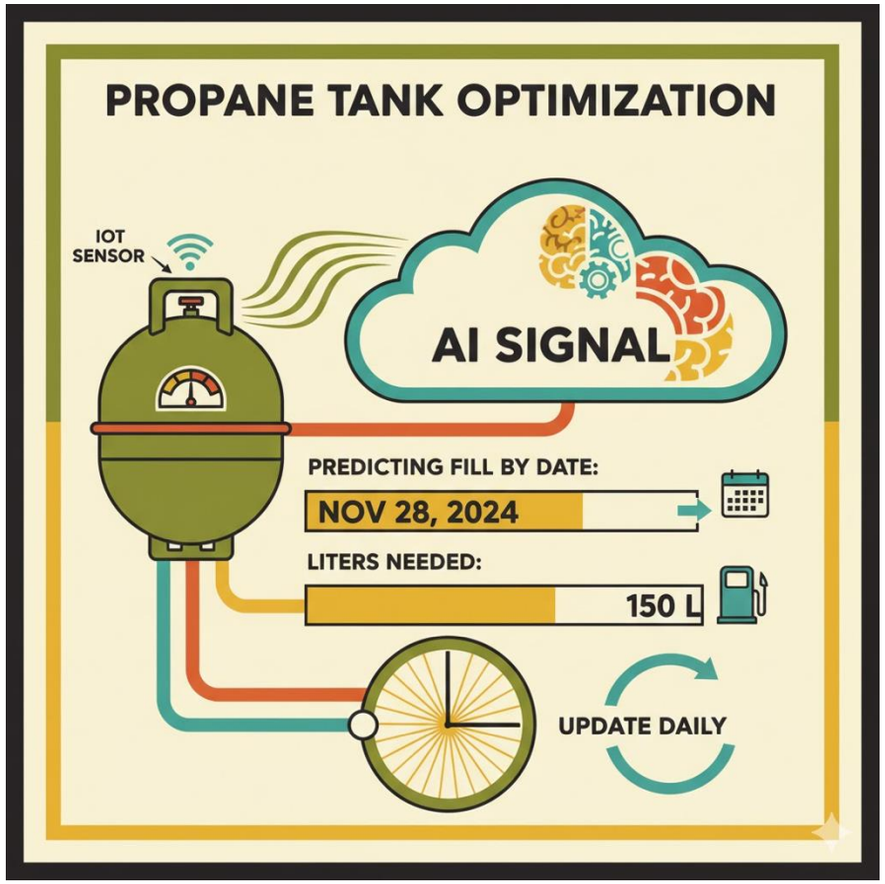
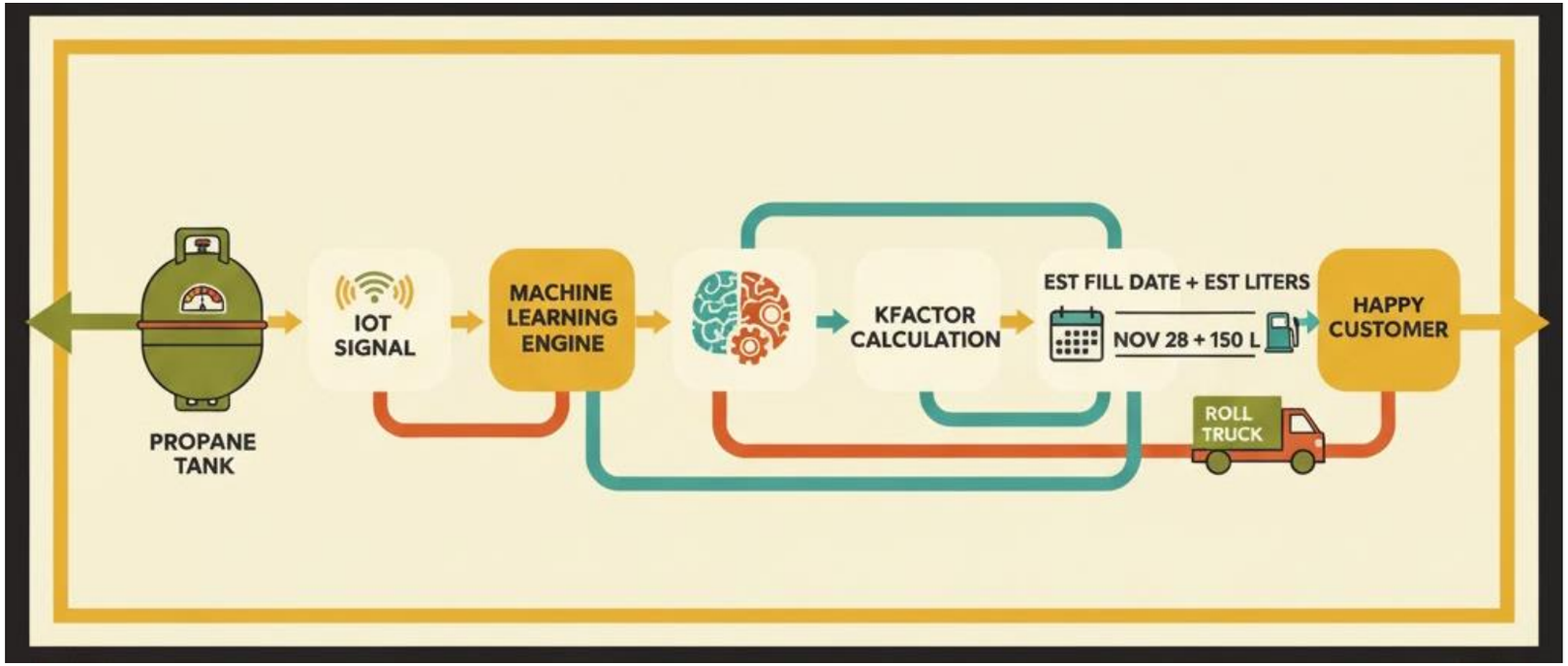
DEMO

Use Case 1: Predictive maintenance + asset history

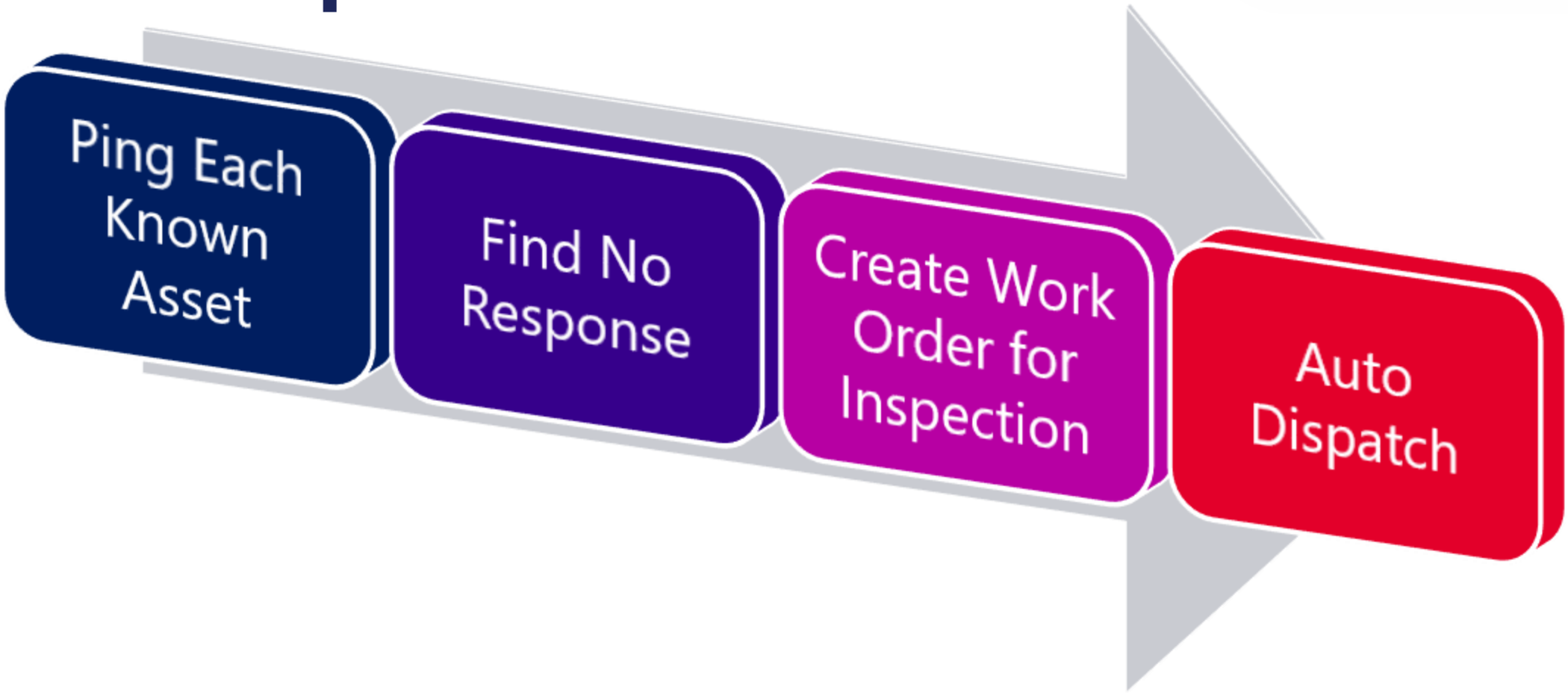


IoT alert triggers rule
> Auto work order with asset telemetry

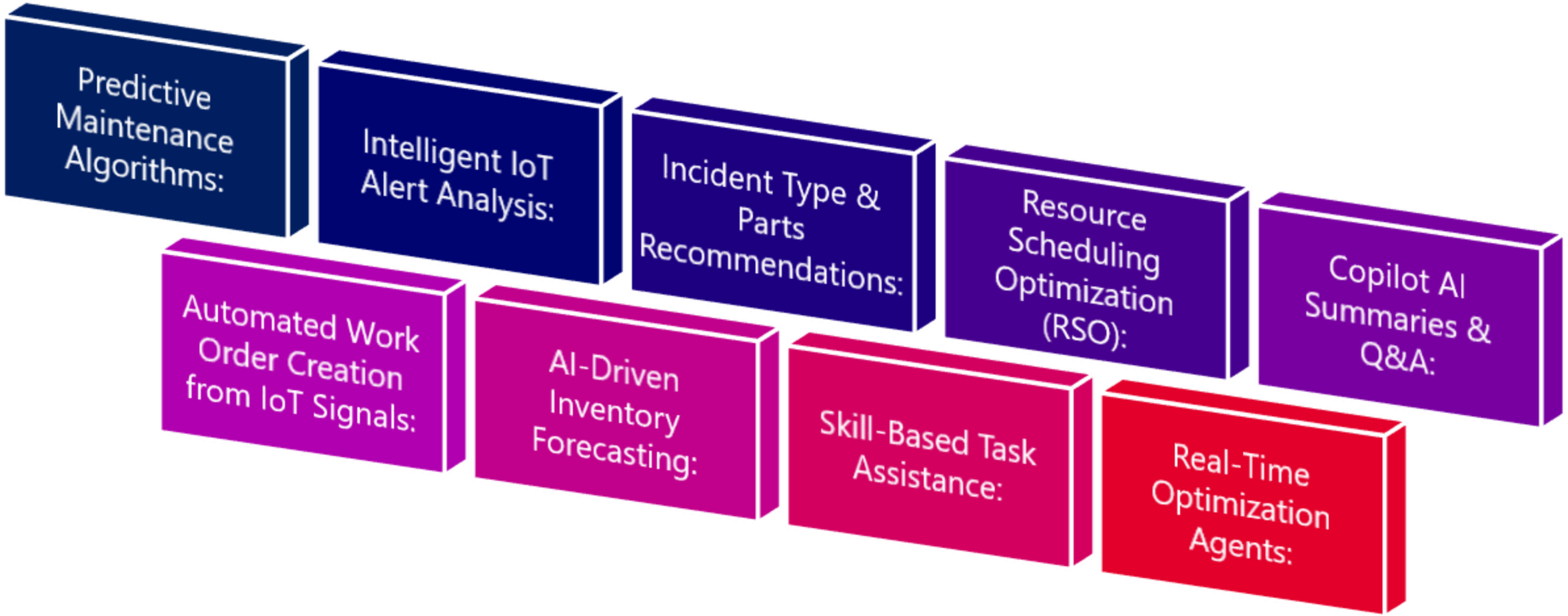




FRED to Repair Work order



AI Components of IOT Connected Field Service



Use Case 2: AI scheduling & day-of re-optimization

Inputs: skills, proximity, SLA, shift/crew constraints, parts readiness

Copilot scheduling to test 'what-if' changes and re-run optimization

Day-of disruptions: cancellations, overruns, traffic → re-plan in minutes

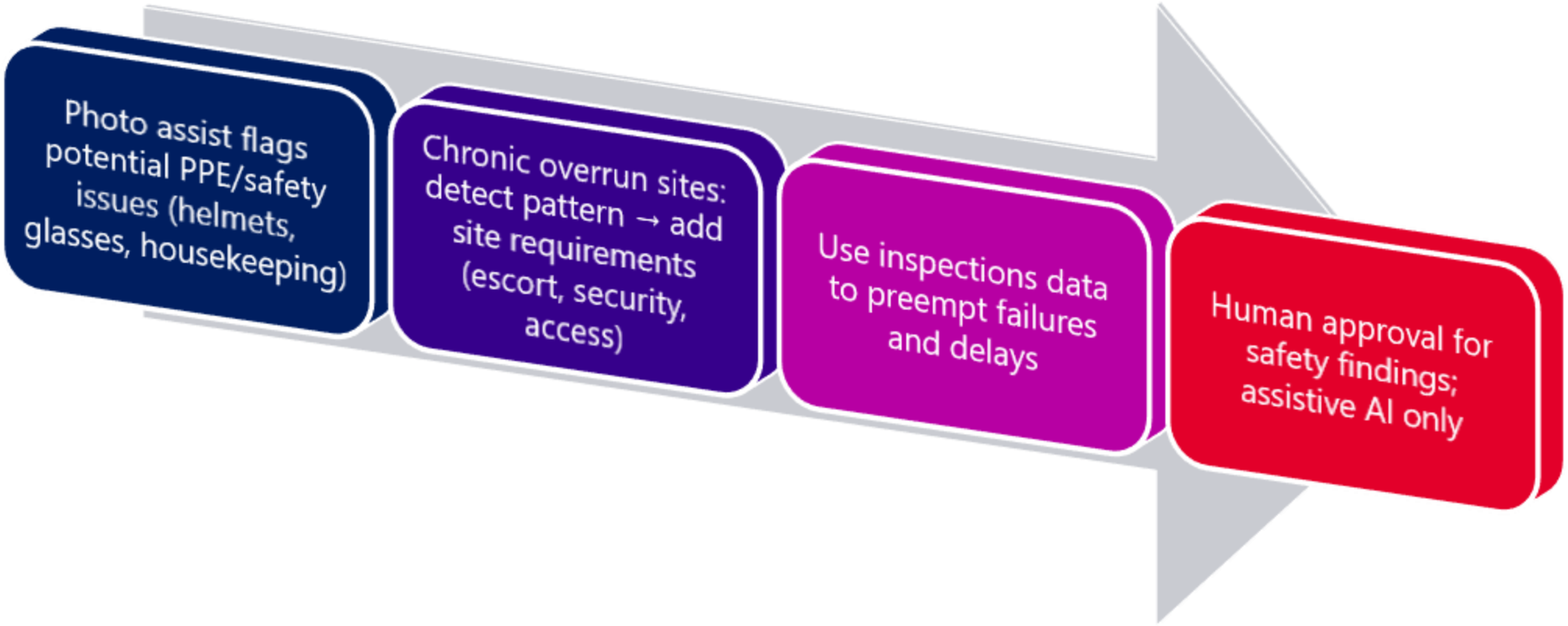
Impact: travel time ↓, FTFR ↑, on-time arrival ↑

Tech – On Schedule Board - Demo

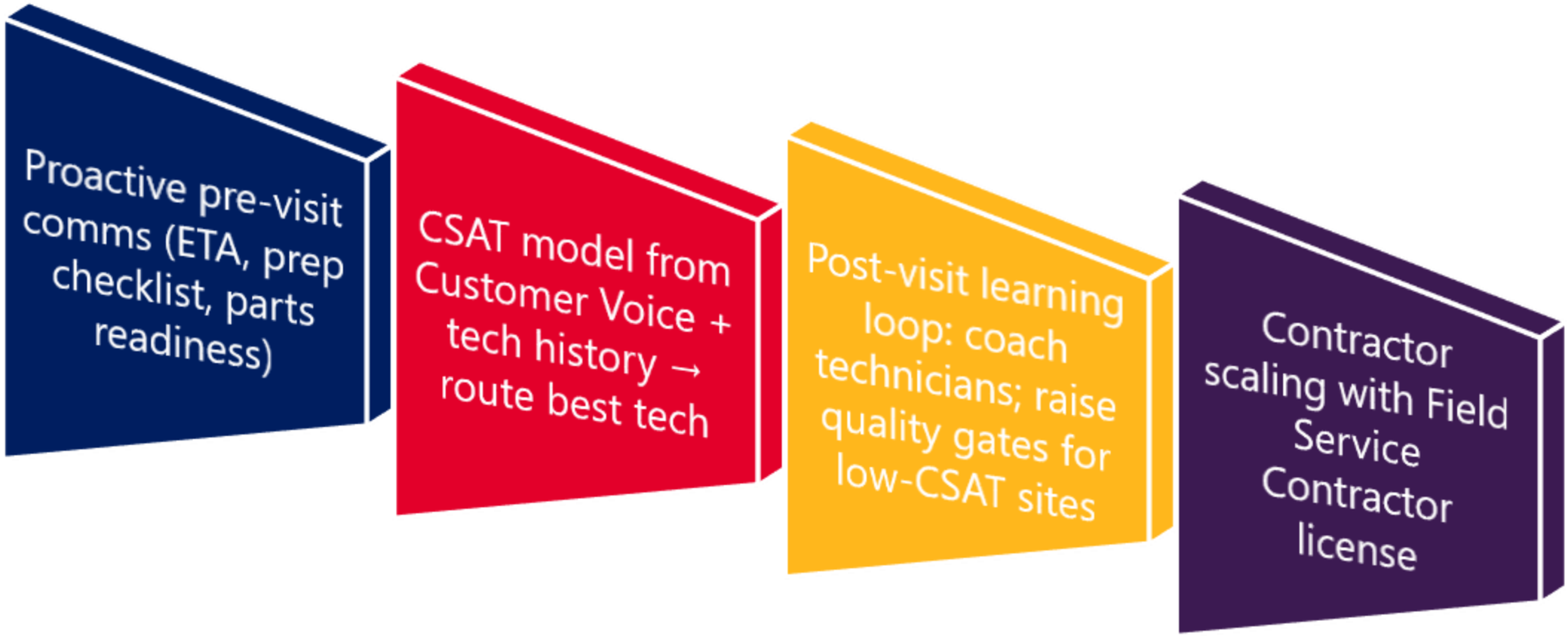
- Double Booking
- Canceled Booking
- Mobile Tech
- "Next Work Order"
- Take A Picture "What is this? Where can I get it?"
- Picture Diagnostic

Use Case 3: ‘Work Orders at Risk’ (weather + travel)

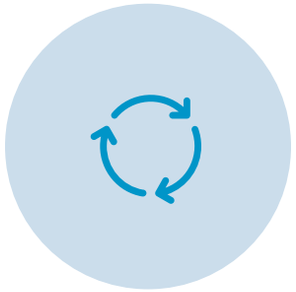
Use Case 4: Safety & site intelligence (photo + history)



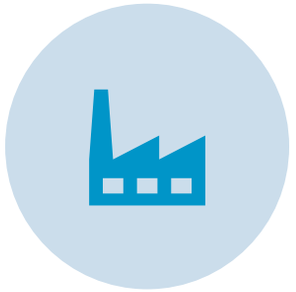
Use Case 5: Customer experience & CSAT prediction



Blueprint: Start in 90 days



Phase 1: Scheduling optimization + CSAT loop; basic ‘WO at Risk’ (weather/ETA)



Phase 2 : IoT → auto work orders for 1–2 asset classes; inspection pre-checks

Phase 3: Safety photo assist pilot; chronic overrun site model; contractor scale-out

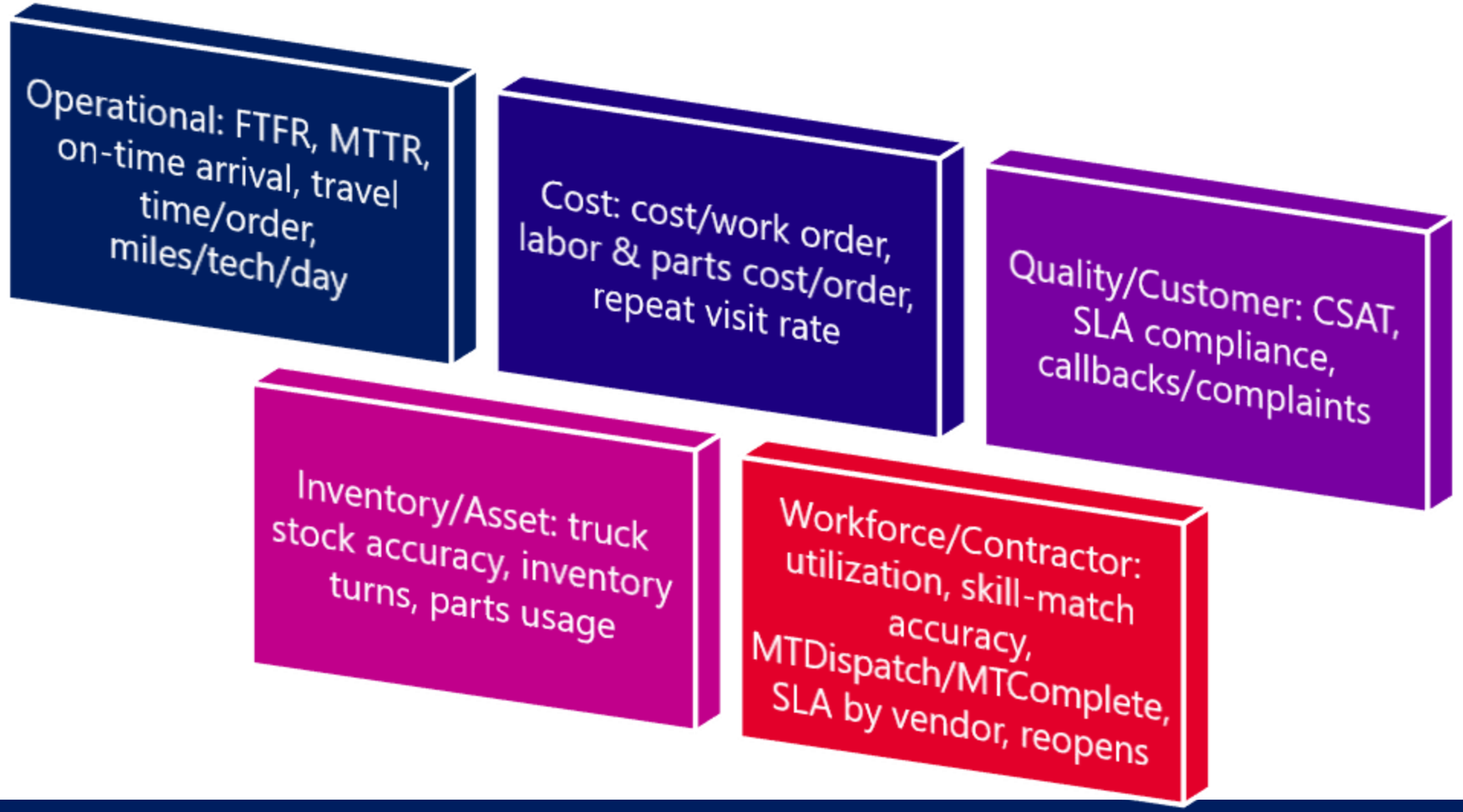
Change mgmt & training plan; governance & data readiness

Field Service doesn’t have to be an Expensive Project

Blueprint: Make It Happen

- Pick the right concept
  - 1 well-execute idea is better than 10 half-ass projects
  - Focus on high business value, not just convenience
- Leadership & End User Buy-In
  - Get a small team aligned, and keep it small
  - Make sure leaders make decisions – indecision kills projects
- Don’t Get Distracted
  - Focus on key concept, avoid scope creep
  - Save great ideas for the next project

Measure what matters: KPIs



Responsible AI & governance

Assistive AI (no fully automated adverse actions)

Data minimization & consent for photos/IoT

Human-in-the-loop reviews for safety and personnel insights

Follow organizational AI policy for ethics, privacy, and transparency

References & further reading

Microsoft Dynamics 365 Field Service blog: AI & Connected Field Service

Internal case study metrics (Facilities portfolio outcomes)

Event planning notes: AI scheduling, weather risk widget

Licensing: Customer Voice entitlements; Field Service Contractor

Key take-aways

AI is Only a Part of An AI Project's Success

What is your TOP 3 KPI's? Move that needle.

Physical Operations - What is Talking IOT? Can We Listen

Monitor Conditions

Scheduling Has a double ROI

Build Change Management into the Process