XOi

THE PLAYBOOK

Moving from a Vendor to a Strategic Partner

Introduction

Welcome!

If you've opened this playbook, it's likely that you're a business owner, service provider, or a dedicated member of a field service team, and are looking for ways to move beyond a transactional relationship with your customers; the kind of relationship where the customer needs service, contacts a provider, and payment is exchanged. Most customers do not see the need to have a deeper relationship with their provider, even if said provider has the means and desire to invest in every customer. If your business has the ability to provide sophisticated, data-backed, money-saving advice, you'll have the opportunity to fundamentally change how your customers perceive you.

Being a reliable, reactionary provider is the baseline standard of service. To be a true partner, you need to understand how to use the data at your disposal to inform super intelligent decisions and capital planning processes.

Over the last decade, field technicians have been collecting critical on-the-job 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.

The key to proactive, customized service lies within those data points. XOi has done the work to analyze the data and compile this comprehensive playbook for how to shift your customer relationships from a standard vendor to a strategic partner.

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PART ONE

GETTING STARTED

The Ideal Technology Stack

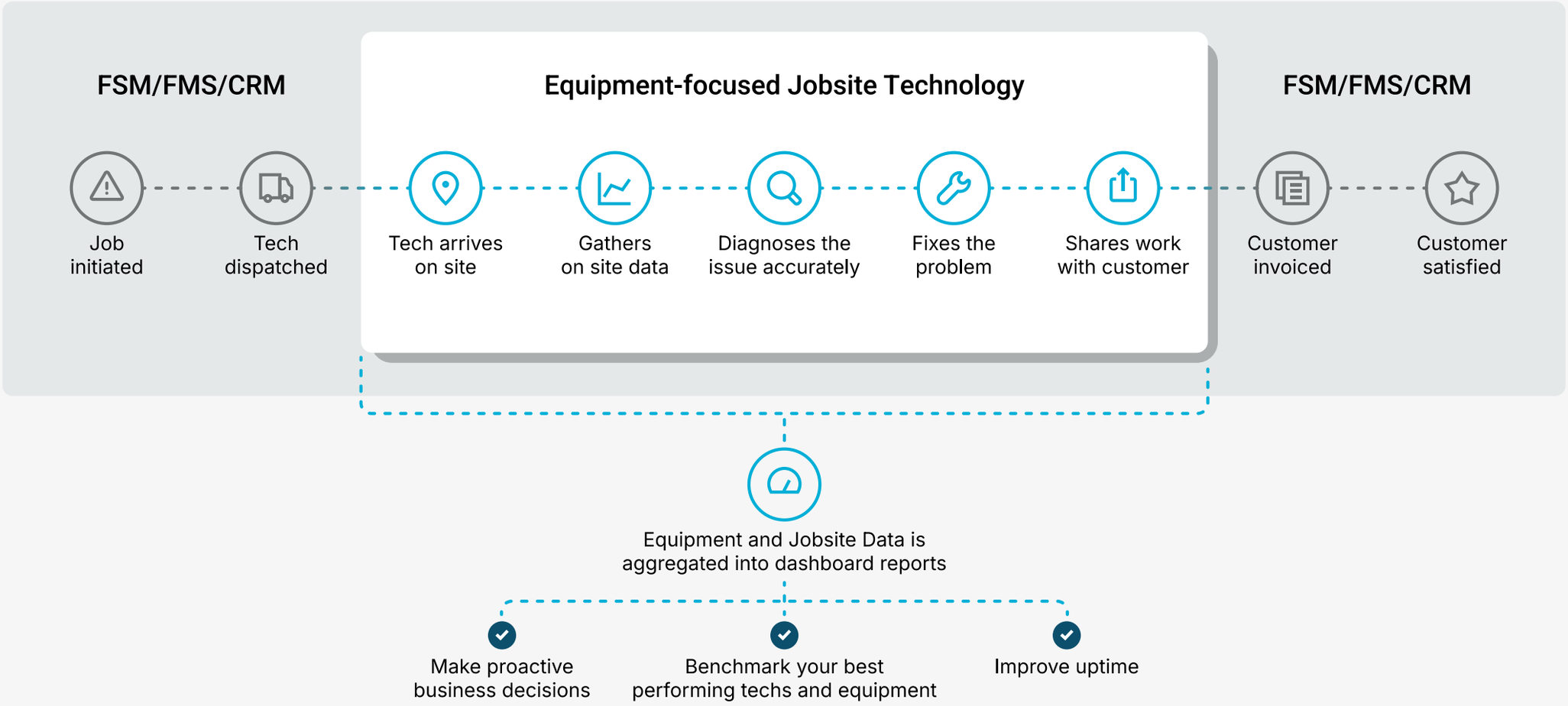
Before you can offer proactive, strategic guidance to your customers, you must first establish a strong technology foundation. This is the infrastructure that allows you to collect, analyze, and act on the critical data that supports a lasting and trusted customer relationship.

As the market for field service software has matured, the landscape has settled into a handful of very large companies and a constellation of smaller platforms all promising to help field service providers and asset owners/operators operate more efficiently and profitably. Unfortunately, this seemingly endless (and growing) supply of solutions doesn't quite solve the industry's needs. Field service professionals often face the choice between clumsy all-in-one software or narrowly specialized platforms that don't address real situations service professionals see on the job. Bulky all-in-one options might do everything, but they rarely excel at anything.

Specialized software, on the other hand, sounds great; but too many companies end up with an expensive selection of best-in-class platforms that don't work together. Field service technicians spend up to two and a half hours every day searching their tablets or smartphones for solutions to situations they encounter in the field. Whether its manufacturer's specs, a product manual, a video tutorial, or regulatory data, the information they're looking for is out there. Unfortunately, it's widely dispersed and comes in a bewildering variety of formats, many of which aren't compatible with each other or with a business's primary FSM. Accessing and engaging with this critical information requires time, patience, and multiple applications. Many field technicians use as many as nine different apps in a single day just to complete straightforward jobs.

The ideal technology stack relies on consolidation and collaboration across technologies. If the FSM is a baseline standard of technology in the world of field service, equipment-focused technology is the gold standard. Utilizing software built with the equipment in mind, the collection of first-party data from the field becomes effortless. The input and output of information about the job at hand is paramount to the experience with the technology. Through that jobsite-focused approach, data and information from your FSM, and additional software, should flow seamlessly through the jobsite application — becoming a "single pane of glass" solution to manage your equipment, back office, technicians, and customers.

The Ideal Technology Stack



Data Collection

With this single pane of glass solution in place, jobsite and equipment data is collected simultaneously as the technician or site representative is doing the job they were hired to do. It's a systematic workflow approach to the job that requires no extra work on their part, they just have to complete the job at hand.

When information is flowing through a single source, the enrichment process of that collected first party data is second nature.

To successfully run a business in today's marketplace — with headwinds that include regulation compliance, skilled labor shortages, and rising energy costs — requires vast amounts of structured, model-specific equipment data that must be actively procured and maintained on an on-going basis.

We're speaking of enriched data points such as refrigerant charge, heat types, fan speed controls, and more. If this data flows through a single source, and is combined with the first party equipment and performance data, it unlocks your ability to scale business within your current customer roster, keep your data centralized, and proactively plan for future failures and maintenance needs.

Field service providers and asset owners need solutions that connect technicians with the equipment they service and allow teams to collaborate across the field service ecosystem. Advanced artificial intelligence and data collection elevate the possibilities of the industry. Unprecedented access to data and analytics improve workflows and productivity and deliver actionable insights that field service providers and asset owners can apply for future growth and success.

If that data can't flow from app to app, it's worthless. Simply using a tool to collect key information won't do your business any good if there is no way to analyze and actionize that information. Your single pane of glass technology solution should centralize key data points into simple insights and reports.

A successful technology solution does more than just connect techs with an order form for parts and equipment – much more. The goal: connect data points from the equipment's entire lifecycle into a singular platform — and spark an ecosystem of industry intelligence.

The Role of Technicians

There’s no shortage of technology solutions promising to streamline operations and boost technician productivity. But for too long, these tools have been built for owners and leadership — not for the technicians doing the work. And yet, it’s the technician who holds the key to some of the most valuable data a company can collect.

From jobsite insights to equipment diagnostics and customer-specific details, technicians are in the best position to capture rich, first-party data in real time. The challenge? Giving them the right tools to do it without slowing them down.

That’s where jobsite and equipment-focused technology comes in. Designed with the technician in mind, these solutions turn everyday tasks — like documenting work, checking equipment, and completing jobs — into opportunities to collect critical data automatically.

The Role of Technicians

Jobsite-first solutions allow professionals in the field to:

- **Make data-collection part of their workflow.**

  Technicians can easily snap photos, record videos, take notes, and eventually have conversational dialogue with AI before, during, and after every job. This workflow process builds transparency for customers and managers while also feeding an archive of real-world jobsite documentation. That continuous collection of media becomes living, visual data, usable for training, auditing, benchmarking, and future quoting.

- **Capture instant equipment data.**

  Instead of writing down serial numbers or filling out spreadsheets, techs use Optical Character Recognition (OCR) to capture make, model, and serial numbers directly from equipment dataplate photos. This eliminates manual entry errors and ensures accurate, structured equipment data is saved instantly.

- **Access contextual learning and guidance.**

  Microlearning tools — like bite-sized videos, checklists, and visual prompts — can be embedded into a technician's workflow, offering on-the-spot support. These resources not only help techs complete jobs correctly, but also serve as reference points that collect usage patterns and highlight repair needs over time.

- **Create digital workflow records.**

  Customized workflows walk technicians through consistent steps based on job type or customer requirements. As they complete tasks, data is captured automatically, creating a detailed digital record of every job with zero extra effort.

By embedding data collection into the technician's workflow, contractors gain access to accurate job, equipment, and business-level insights while speeding up operations and accuracy. These solutions don't just digitize the job, they transform technicians into real-time data producers.

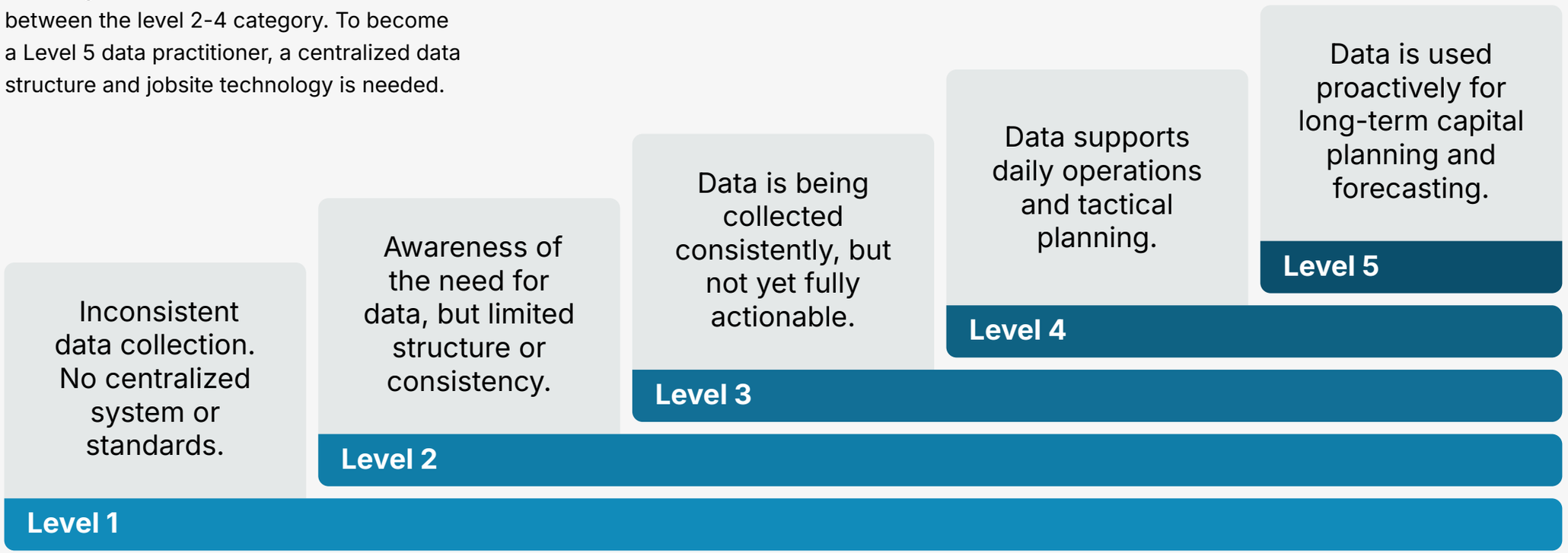
PART TWO

DATA ANALYSIS

Your Data Journey

Where does your organization currently stand?

Most organizations we work with fall in between the level 2-4 category. To become a Level 5 data practitioner, a centralized data structure and jobsite technology is needed.



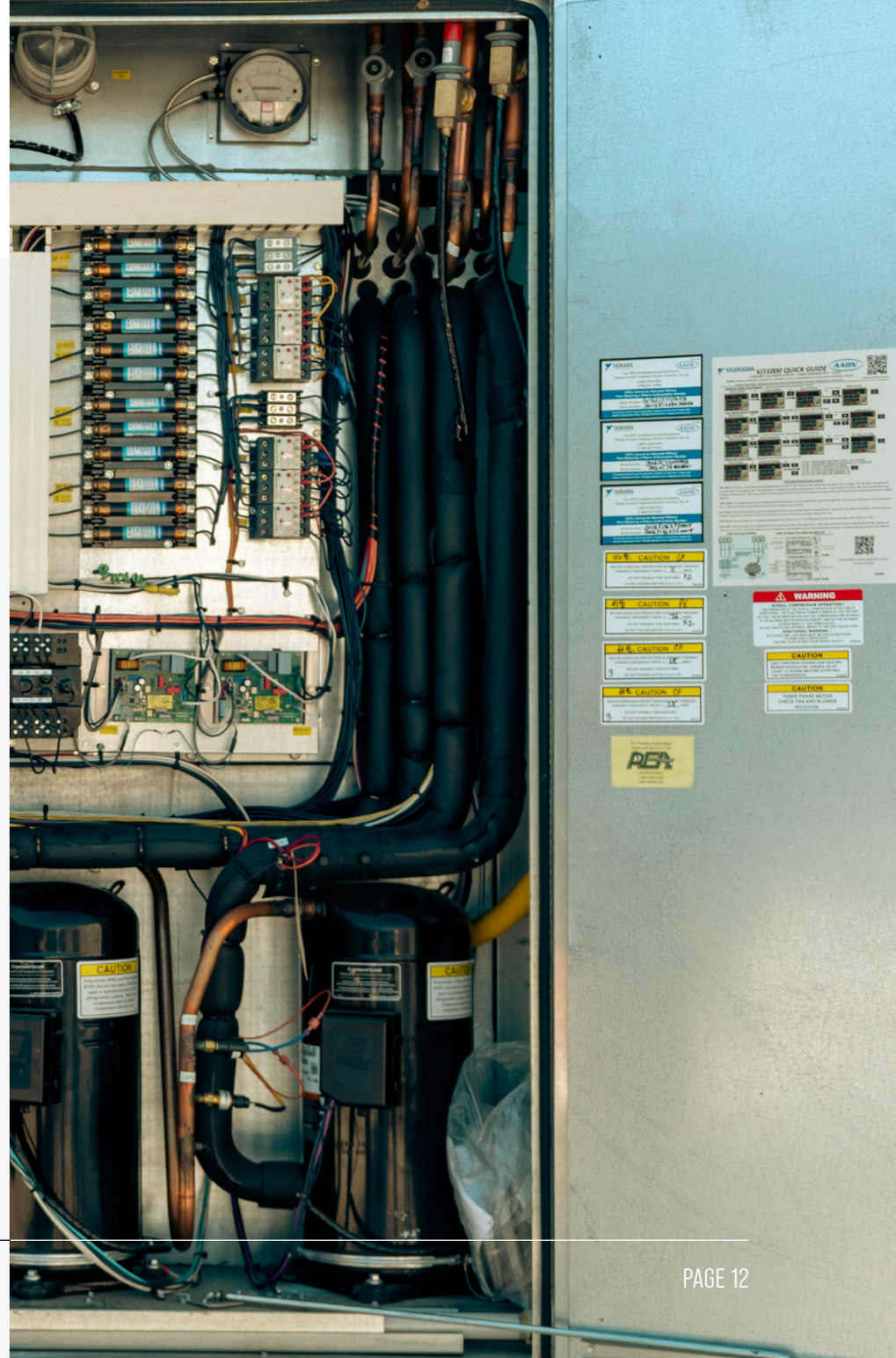
The Enriched Data Landscape

It all starts with the dataplate.

Similar to a VIN on a car, an equipment dataplate model and serial encodes a wealth of critical information about your equipment. Decoding and acquiring this enriched equipment data is extremely complex and resource-intensive. Without automation, this process can be taxing on a small scale — not to mention attempting for an entire portfolio of assets.

We know that access to this critical data is imperative to the health of your business and the proactive partner relationship you'll have with customers, but the manual, labor-intensive and error-prone data acquisition and management process is a hindrance to the evolution of a business, rather than a help.

Automated data enrichment is the way through this cumbersome process. Technology with automated capability effortlessly retrieves complete, detailed equipment records from a standard dataplate. When automated through technology, data retrieval is a continuous process, with new data flowing directly into the equipment record whenever available.



The Enriched Data Landscape

At XOi, we categorize the enriched data landscape into three specific categories: Specification data. Performance data, and Product documentation.

Specification Data

Origination data, features, and component performance levels.

Performance Data

How the equipment was managed and maintained, in specific locations, by specific technicians. Data detailing equipment reliability and health.

Product Documentation

Technical product documents such as service bulletins, wiring diagrams, and installation manuals.

With a single pane of glass technology solution, this data can be accessed by every stakeholder, and inform each interaction with equipment — from the point of manufacture, to the last invoice.

Automatically accessing enriched data is the key step in moving from a vendor to a strategic partner customer relationship. Just like meteorologists use thousands of data points like temperature, pressure, humidity, wind patterns to predict storms before they hit, having detailed equipment performance and lifecycle data lets businesses forecast breakdowns, inefficiencies, and service needs before they cause downtime. Instead of reacting to problems after they've arrived, you're tracking the clouds, spotting the pressure changes, and preparing the umbrella before the rain starts. It's the difference between scrambling during a surprise outage and confidently scheduling service before anything ever goes wrong.

PART THREE

CUSTOMER STRATEGY

Datapoints You Need to Succeed

With automated access to your first party data + enriched data, there are hundreds of structured datapoints that can be used to increase productivity, streamline day-to-day operations, save on operational costs, and drive proactive revenue growth.

Let's take a look at a few key datapoints:

Datapoints	Equipment Type, Asset Age, Component	Equipment Type, Heat Type, Equipment Age	Equipment Type, Make, Age Group, Service History
Strategic Partner Output	**Issue Frequency by Component**	**Electrification and Decarbonization**	**Frequently Serviced Equipment Benchmarking**
	• This specific aggregation of data will show a component's (compressor, refrigeration, etc) likelihood of experiencing an issue at a specific age. • Knowing this, you can inform your customers that maintain certain equipment types that a specific component of the equipment is likely to fail at a particular age.	• This aggregation of data uncovers the older gas units on a customer's equipment roster — which are more likely to have holes or cracks in the exchanger — leading to high levels of carbon monoxide in the environment. • Knowing this, you can have data-backed conversations about the safety issues being created, set up a maintenance cadence for operation, efficiency, and safety on the affected units, or have a discussion about replacement.	• This aggregation of data shows how many times equipment of a specific type, make, and age has been seen historically in service calls. • Knowing this, you will understand how many pieces of customer equipment in this specific category of make, type, and age are likely to need future service.

The New Capital Planning Cadence

The standard for capital planning involves a long-term allocation of funds. Typically, at the end of the year, a facility manager will assess where their business currently stands, and put together a high level plan for jobs to be done in the upcoming year. This plan projects all estimated expenses, incurred fees, equipment, staff, sales and ROI. The plan is disseminated to contractors to discuss with their customers and plan out their year, leveraging the contractor's expertise.

The new expectation relies on consistent and proactive capital planning based on first party and enriched data. Relying on standardized data from an OEM or major manufacturer may be untimely, subjective, or even unreliable. Companies who rely on antiquated capital planning techniques may not survive in today's market — you need automated access to predictive analytics, so you can shift capital investments fast.

Let's discuss this modern approach to capital planning with a real-life example:

A company utilizing equipment and jobsite-focused technology automatically gathers essential data about the lifecycle of their equipment. They've done the work to encourage their field staff to capture data from assets in the field, that asset data is automatically enriched, and all of that information is routed back to their software. Having that data, the field manager gets a report on a crucial piece of information about a customer — come November, 25 pieces of this customer's equipment are running on R22 and set to reach end of life status. Now, the team can work to be proactive. The sales manager reaches out to the customer and lets them know that in November they have equipment that will be due for a fix or replacement, encouraging them to get that work done now, because once November comes around, it's likely that equipment and parts will be held up in the supply chain, or just flat-out unavailable. On top of that, they may not have the staff available to work on 25 units at once. If the customer waits until November, a straightforward fix could turn into an emergency situation.

Because they can actionize the data they've collected, the company is able to plan in real-time. Replacing or refurbishing 25 units at once means they'll need to project expenses for the labor, equipment (not just the units — will the technicians need to access the roof? Do they need a crane, a helicopter?), parts, delivery, and any additional expenses related to the job.

Having crucial data on your equipment means the fix is identified, budgeted for, and taken care of before it becomes an emergency situation. This proactive approach will undoubtedly save your customers time and money — no rush shipping, no waiting around, no unidentified expenses.

Reactionary vs. Advisor Approach

Let’s look at some key differences between a reliable, but reactive approach, and an advisor-level premier partnership

Reliable, but Reactionary

- Responds quickly
- Communicates effectively
- Presents issues when found
- Bids work when requested
- Asks for data and information
- Provides plans when asked for

Advisory Partnership

- Equips technicians with as many resources as possible
- Provides transparency at all times, not just when required
- Presents data and evidence to support recommendations
- Highlights concerns supported by history and data
- Provides regulatory and compliance guidance
- Presents comparative and benchmarking data to educate and support plans

Strategic Partnerships Are Not Built Overnight

But with instant, automated access to equipment data, you can begin to build that relationship immediately.

Jobsite-focused technology like XOi can instantaneously build your business a structure for data collection and analysis. If you'd like to discuss the right solution for your company, get in touch with our team.