The Challenges of Field Operations

**How software can be both
the challenge and the solution**

expandit

ARE DIGITAL CHALLENGES KEEPING YOU AWAKE ?

How effective is field service management software in addressing the many challenges field managers face? Not every field service organization requires comprehensive enterprise management software to run their field operations, but many organizations are unsure how end-to-end field service management solutions cater more specifically to their industry.

This eBook describes the challenges faced by organizations with field operations.

If and when an organization faces these challenges depends on the size of the organization, the specialization of the individual team members, the industry, and much more.

We have found that the challenges can be grouped into:
- Productivity based challenges i.e., how efficient people perform
- Collaboration based challenges i.e., how effective teams perform
- Quality assurance challenges i.e., how consistent organizations perform

Some of these challenges can be met by information technology and some by organizational measures.

OPERATIONS IN A DIFFERENT PERSPECTIVE

The nightmare of every manager is a money losing job and not knowing about it. A systemic 'hole in the boat' and money/time gushing out unbeknownst to the management.

In the following we will review in detail the typical challenges faced in field operations, that left unchecked can develop into a systemic, resource draining problem.

We will explore 4 challenged areas, seen from 4 stakeholder roles and from the angles; **customer experience, operational excellence, compliance and business innovation**:

Customers

Planners

Field Operatives

Controllers

How hard is it for your customers to do business with you?

We are all experts in customer experience, especially when it goes wrong! When dining, the food can be excellent, but the experience marred by poor service or vice versa.

Think of the last time you went out for dinner:

- How easy was it to book a table?
- Upon arrival, how easy was it to park, i.e. did the vendor service your entire 'dining process'?
- Were your special booking-requests catered for?

Well seated - here are the next challenges:

- How easy is it to get in contact with the waiter?
- How easy is it to understand / comprehend what the 'product' is?
- What is the scope of the product / how big a serving?
- What is the perceived price/performance?

At this point you have got hold of the waiter, you have a menu, looking at your fellow diners you have an idea of the size of the servings, the waiter has helped you decide food and wine, you have specified your personal requirements / preferences and the waiter has left the table with your order.

New questions arise:

- When can you expect delivery?
- Are you informed of any delays/change of plans?
- Upon delivery, does the waiter / field operative have access to all the information you provided when ordering?
- Have you got what you asked for and at the specified time and place?
- After delivery is everything as expected or is the something that needs to be fixed?
- Is the billing correct and timely?
- Did they offer a doggy bag for the leftovers?

At this point you are hopefully well fed and feel that you have been charged fairly for your dinner. This is also where the analogy between restaurant visits and field-based businesses stops because these days we expect cradle to grave options:

- Do I get a preventive maintenance nudge / quote when its time?
- Is the field operative well prepared, has access to relevant, historical information about the installation and bring the correct service kit?
- Is it easy to get the installation fixed if it breaks down?

Finally, the most important and difficult question: Did they solve the problem?

OPERATIONAL EXCELLENCE

Can you give your customers the experience they expect at a cost where you are still competitive and profitable?

The relentless competition and our aspiration for a better life for ourselves and our team puts pressure on productivity – higher real income can only come from increased productivity. All other options lead to either losing your customers or your profitability and eventually your job.

The first step in any competition is to identify and avoid systemic problems:
- Do you know whether a job is profitable or not?
- Can you easily identify where and why you lose money?

One of the easy fixes is to invoice correctly - customers rarely complain when an invoice is too low so time, material and resources must be accurately accounted for.

When you have identified and fixed the major systemic problem, then you can start improving performance.

For field operations software where travel distance is a parameter, sending people with the necessary skills to the correct location at the agreed time with the parts and tools needed to get the job done is key to operational excellence. If you plan the use of resources well, you can have more people in the field with the same administrative staff which in turn means lower cost per transaction.
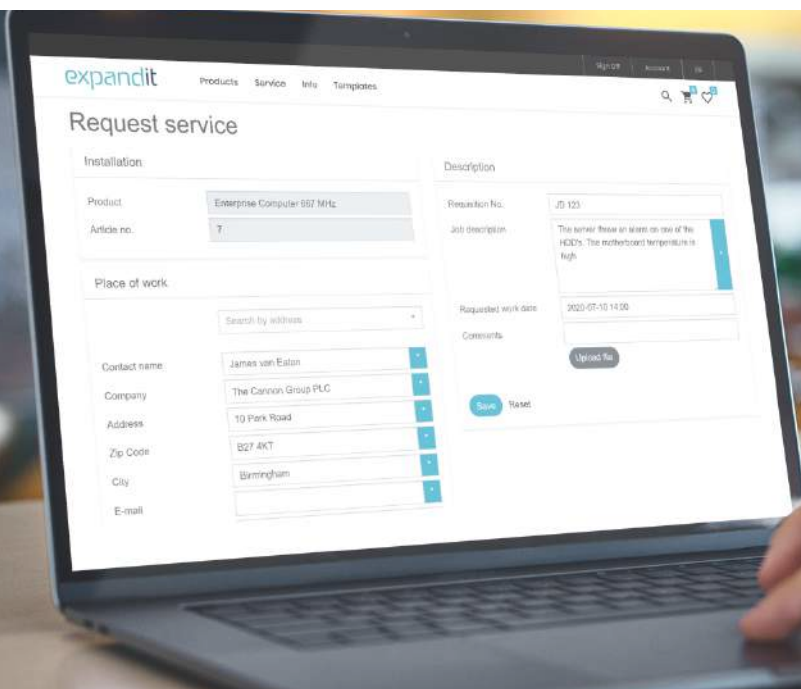
3 KEY PLANNING CHALLENGES

3 key planning challenges
- **Prioritize work**
- **Schedule more than three visits per day per resource**
- **Assign enough resources to complete tasks in time**

'Triage' and 'SLA' / Service Level Agreement are tools to prioritize work orders, the first typically performed as an evaluation by the planning role and the second typically set by a combination of customer, location, point in time and service item.

However, all work orders have a 'Best before date' – preventive maintenance jobs may initially have a low priority, but they cannot be pickled forever, so the challenge is to identify when a job have to be executed.

Some organizations have visits of short duration, 15 minutes or less, where they do part service and part sales, so the challenge is to plan up to 60 visits in one day with minimum travel time while still taking opening hours into consideration. The human brain struggles to keep up with this challenge when the field team gets bigger than the 'two pizza' team. Mathematically there is no 'best' solution to this challenge, only a least bad and different service providers use different algorithms to crack this problem.

At the other end of the scale some organizations must meet deadlines and face the challenge of finding available, qualified resources across the organization and sub-contractors.

Some organizations with field operations may not, irrespectively of their size face any of these challenges, because they either have an abundance of low-cost resources or work in 'two-pizza' teams where collaboration is easier.

However, once you face the challenges, they get bigger and more intense as your business grows. Life happens, people call in sick, trucks break down and you must react – often short term.

The old 'Be like a duck – above surface look composed and unruffled and below paddle like hell' comes to mind.

COMPLIANCE

In the board game Monopoly you want to stay out of jail and part of compliance is about that – if what you do is regulated, 'compliance' is whatever helps you prove that you have done it 'right', where 'right' is defined by authorities.

In field operations this proof is typically forms where the format is provided by either the industry organizations or some sort of public institution.

Another part of compliance is quality assurance, the systematic effort to ensure what you deliver to customers meet with the agreed terms and conditions. In field operations this is typically a work description with checklists and signoffs.

The main challenge for field operations is to have best practices such as:
- 'For this type of task, we have decided to use this approach'
- 'When we work on this type of machine, we have decided to use these, improved specifications'
- It is the law that output from this type of installation must be within these tolerances.

These challenges are easily overcome by two-pizza teams but when operations start to complain about 'lack of information' from management, when onboarding new team members becomes a problem and when some perform 'better' than others then you may well be facing this collaborative challenge.

The final challenge is to verify to the customer what you have done in the form of a traditional receipt, a report of the work done or a certificate of compliance. It is crucial that the latter is made available to the customer either as a physical document or in electronic form on a self-service portal or on email.

BUSINESS INNOVATION

Why do you have a competitive advantage, and can you use it to your advantage in this new market or with these new services?

The challenges are:
- Identify why you are competitive.
- Transfer all the things you are doing well with one service or in one market to another service or another market.

The first challenge is tough, and few organizations have a companywide, consistent idea why they are performing the way they do.

The second challenge is often overcome either using procedural collaboration or by outplacing experts to a region or in a business unit.
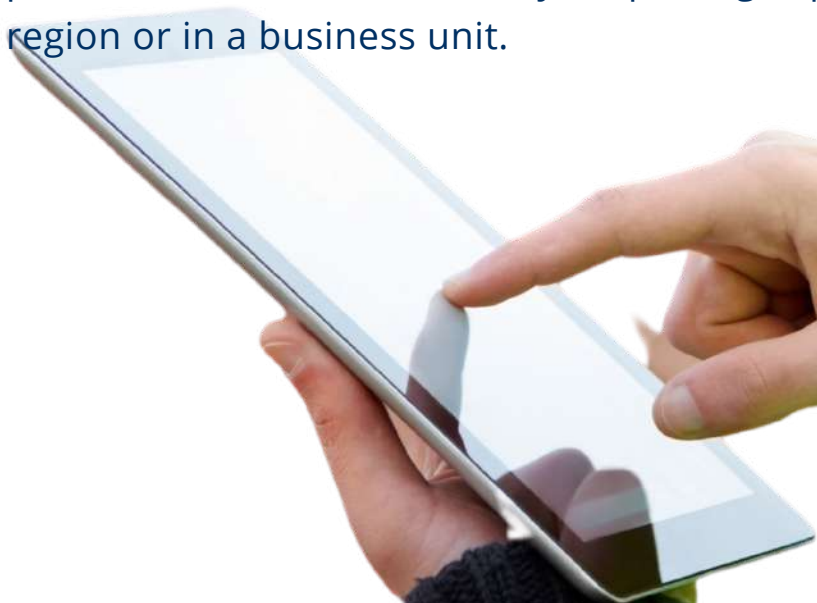
How Digitization can Benefit Field Operations

Digitization means that you can store and reuse information. That in turn can make individuals more effective and organizations more efficient.

Businesses information technology should always have 4 benefits:
- Make sure you enter data only once.
- Make sure you invoice everything.
- Make sure you get paid.
- Make sure you identify systemic problems and thereafter avoid them.

In field operations we can do more – a lot more:

CUSTOMERS
- **Customer Experience**
  - Share information
- **Operational Excellence**
  - Provide diagnostic information
- **Compliance**
  - Store certificates and share ledgers
- **Business Innovation**
  - Feedback / stay informed

FIELD OPERATIVES
- **Customer Experience**
  - Prepared and on time
- **Operational Excellence**
  - First time fix
- **Compliance**
  - Onsite forms
- **Business Innovation**
  - Best practices

Planners
- **Customer Experience**
  - Augment information
- **Operational Excellence**
  - Least bad plan
- **Compliance**
  - Ensure correct ressources for job
- **Business Innovation**
  - Use generic skills across markets

CONTROLLERS
- **Customer Experience**
  - Correct invoicing
- **Operational Excellence**
  - Accounting of time, material & expenses - identify cost zinks
- **Compliance**
  - Payroll, Q/A on completed forms
- **Business Innovation**
  - Identify systemic issues. Create and extend procedural tools

A FIELD SERVICE MANAGEMENT
SOLUTION WILL HELP YOUR BUSINESS:

- ✓ EMPOWER YOUR MOBILE WORKFORCE

- ✓ STREAMLINE PROCESSES

- ✓ IMPROVE COMMUNICATION

- ✓ AUTOMATE TASKS

CONTACT US TODAY TO FIND OUT HOW EXPANDIT CAN HELP YOUR BUSINESS!

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