

SIMPLIFYING PROOF OF WORK AND COMPLIANCE

HOW TO GET FROM ZERO TO HERO

THE CONNECTED ENTREPRISE -
CONNECTING THE FIELD AND THE OFFICE



STOP DUPLICATED
DATA ENTRY

HOW LEAN IS YOUR
FIELD SERVICE - REALLY?

FORMS DON'T GET LOST
IN THE VAN

HOW LEAN IS YOUR FIELD SERVICE OPERATIONS - REALLY?



In the field service industry, efficient data collection is essential for ensuring smooth operations and delivering excellent customer service. However, relying on manual processes can lead to errors, delays, and missed opportunities.

Traditional paper-based processes are prone to issues such as delays in receiving vital information, missing or incomplete data, and inconsistency in captured data. These challenges can hinder productivity and impact the quality of service provided.

With ExpandIT, you can easily disseminate, collect, share and use data to streamline your operations and maximize productivity.

Our solution allows you to document proof of work, ensuring that all tasks are completed to a high standard and providing accountability for your team.

With all-time access to data, you can make informed decisions and quickly respond to changing situations, keeping your business ahead of the competition.

Many companies with a field service operation cover a lot of different areas of work. These can be highly complex and workflows may have a number of dependencies that must be met to complete the job.

The field service work can cover everything from design to install, renovation, repair and service work, meaning each job is different to the last and again the use of paper-based forms to cover all work areas can prove difficult to manage.



DO YOU KNOW HOW TO ENSURE THAT:

- **WORK IS DOCUMENTED?**
- **OPERATIONS ARE COMPLIANT?**
- **PROCEDURES ARE FOLLOWED?**
- **AND YOUR WORKERS ARE SAFE?**

In addition, those who work with compliance or regulatory obligations face even greater challenges in managing, recording and reporting information.

It has to be accurate, on time and auditable. The risks of, and penalties for, incomplete, unreliable and late reporting are just too great.

One of the key features of ExpandIT is its ability to document proof of work. This ensures that all tasks are completed to a high standard, providing accountability for your team.

By having all-time access to data, you can make informed decisions and respond quickly to changing situations, keeping your business ahead of the competition.

ExpandIT helps field service organizations easily solve some of the challenges they face in managing information.

On site field workers can collect information more efficiently, with greater accuracy and in less time using forms on their mobile devices.

This information can then be shared with the customers and the back-office electronically to help combat their paper-based challenges too.

THE KEY TAKE AWAY

#1

Providing proof of work

A record of customer requests and work completion is the best way to protect everyone. From small operations to large-scale projects, having a digital trail lets you meet your customers' needs and safeguards your business and employees. You can establish proof of work through:

- Attaching visual evidence of completed work, such as inspection forms, videos or photos.
- Providing an audit log that shows a work order's entire history.
- Having your field workers complete an inspection report, form or checklist.

Document proof of work

A picture says a thousand words. We believe for Field Service it's closer to – a picture avoids a thousand questions!

One powerful feature of ExpandIT is the ability to capture and include photos as evidence or documentation. This allows field workers to visually record the state of assets, any damages or wear and tear, and provide proof of completed repairs or service work. By taking photos directly within ExpandIT, field workers can easily document and communicate the necessary information without the need for extensive written descriptions.

Using ExpandIT for data collection in the field is saving hours of admin every week for field service professionals.





THE KEY TAKE AWAY

2

Outdated software and paper based methods waste time

Inefficient methods of data collection such as spreadsheets, outdated software or even (shock!) paper based methods will slow your business down and restrict your ability to complete more jobs.

ExpandIT Software will enable you to document proof of completed jobs and reduce the time your team wastes on administration. Field workers can collect what they need e.g.files, images or signatures, all through their mobile device.

3

No pen? No problem!

Embedded at the end of most jobs is a form, that will allow field workers to get instant sign off from either your field team working or a customer for a completed job.

No need for an additional clunky device. No special pen, just draw the signature with your finger and you're done! Our goal is to streamline workflow of the field worker and make the job easier. The field worker saves time and effort by eliminating the need for physical signatures or extra equipment.

We believe that simplicity and practicality are key when it comes to improving workflows, and our software embodies just that.



THE KEY TAKE AWAY

#4 **Simple and Easy Evidence Collection**

Gone are the days of cumbersome email attachments and missed signatures. ExpandIT allows you to seamlessly capture signatures and attach photos taken on your mobile device directly to the job record.

Paperwork can get lost or destroyed. Digital forms are easier to access, faster to fill out, and the data goes automatically into a comprehensive database that can be audited later to prove compliance.

By enabling all-time updates, ExpandIT keeps your office in the loop with all the necessary information. Any changes or updates made on-site are instantly communicated to your office, allowing for quick decision-making and enhanced collaboration.

No more email attachments or missed signatures. Your team will collect everything they need on the job and update your office in real time.

#5 **Meeting compliance is easier**

There are strict guidelines that specialized field service industries must follow. Detailed documentation protects your customers' well-being and your business's operations from legal complications.

Meeting compliance is a key objective for a lot of field service organizations, particularly those who manage the maintenance of equipment that is highly regulated.

Meeting compliance standards

Documentation of work, compliance with regulations, adherence to procedures, and ensuring the safety of workers are crucial responsibilities for business leaders in the field service industry. Advancements in technology have made it easier to streamline these tasks and maintain a high level of accountability.



MANDATORY FORMS

Mandatory forms that need to be filled out for each service or repair task. These forms capture relevant information such as equipment condition, repair details, and any compliance-related requirements. By making these forms mandatory, ExpandIT ensures that no crucial information is missed.



WORKFLOWS & CHECKLISTS

Incorporate workflow automation, guiding technicians through the necessary steps and capturing data in real-time, thus minimizing errors and deviations from procedures. By doing this, your staff can follow your instructions instead of guessing what to do next. The checklists ensure that all critical aspects are covered consistently across different units or equipment types.



TIME TRACKING

ExpandIT includes time tracking functionality, allowing field workers to accurately record the time spent on each job or task. This helps in ensuring compliance with service level agreements (SLAs) and labor regulations. The time tracking data can be used for billing purposes, calculating field worker efficiency, or monitoring compliance with response time requirements.



DOCUMENTATION AND RECORD-KEEPING

ExpandIT facilitates digital documentation and record-keeping. It allows field workers to attach photos, documents, and other evidence directly to job records. This ensures that all relevant information is consolidated and accessible, simplifying compliance audits and reporting. Additionally, electronic records are less prone to loss or damage compared to physical documents.



STAY CONNECTED

Whether you are in the field or the office, mobile accessibility gives everyone the information they need at their fingertips. With both online and offline capabilities, your field workers can accurately record and relay job info such as parts required, historical details and time spent as well as access checklists and forms on the job. All relevant information is captured accurately and promptly, reducing the chances of errors or miscommunication.



#6

History, knowledge, information

Sometimes your customers requires proof that certain upgrades or repairs have been carried out, or that the existing assets were in a condition that required those repairs to happen. With ExpandIT you can easily document all the necessary information and provide it to your customers when needed.

No more sifting through piles of paperwork or relying on memory to recall the details of past service visits. ExpandIT streamlines the documentation process, allowing you to easily capture and store information about the condition of existing assets, the repairs made, and any other relevant details. This means you can quickly and confidently respond to customer inquiries, providing them with the evidence they need for in relation to the work you have done.

By utilizing ExpandIT, you can access comprehensive historical information that is easily accessible, searchable, and shareable. Whether it is a checklist or a form, you can easily document and track every step of the process.



THE KEY TAKE AWAY

#7

WebAPI, Power BI, Forms = Data-driven Decisions

The combination of ExpandIT, WebAPI, and Power BI offers a powerful solution for accessing and analyzing valuable information contained within the ExpandIT forms.

This way you get important insights to analyze trends, identify opportunities for improvement, and make data-driven decisions that will help your business thrive.

In the context of ExpandIT and Power BI, the WebAPI provides a secure and standardized way to access the data stored within ExpandIT forms and databases. And with PowerBI's strong visualization tools, you can easily create reports and dashboards to track important metrics and monitor the performance of your field service operations.

Hook your success - Smart Forms That You Control!

With ExpandIT you are in the driven seat! Our customizable forms not only keep your business organized, but they also help you become smarter. You have the power to decide how your forms are designed, used and what they should include. From mandatory forms to safety checklists and sign-off forms, you can customize your forms to fit your unique needs. **With ExpandIT we give you the fishing rod to catch your own success!**



THE KEY TAKE AWAY

GETTING STARTED WITH EXPANDIT IS EASY!



CUSTOMER SERVICE



WORK PROCESSES



COMPETITIVENESS



INNOVATION

IT IS EASIER THAN YOU THINK TO MOVE YOUR FIELD SERVICE PROCESSES TO EXPANDIT. THE INTUITIVE SOFTWARE MAKES IT EASY FOR ANYONE TO PICK UP AND START USING STRAIGHT AWAY.

SIMPLY **REQUEST A FREE TRIAL** TODAY BY MAIL: SALES@EXPANDIT.COM AND YOU' WILL BE CREATING JOBS, SCHEDULING THEM AND BUILDING FORMS IN NO TIME.

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