Moving Beyond the Basics with Field Service Mobility

Gaining True Value Through Full Visibility
SUMMARY

There are many outputs of a field service mobility solution integrated with workforce management optimization scheduling provided through visibility. And with geofencing, it is easy to see where your field workers are on an integrated map in real time—allowing you to provide an ETA. But knowing where technicians are physically located is just a small part of the functionality and benefits associated with a workforce management mobility solution. This paper explores the deeper value that can be obtained from the visibility a mobile workforce management solution delivers through data insights for field service.

THE IMPORTANCE OF A MOBILE WORKFORCE MANAGEMENT SOLUTION

A mobile workforce management solution connects the entire field service team—dispatchers, technicians, field supervisors, operations managers, and other stakeholders—pinpointing where technicians are located during the day and providing full visibility into each job through real-time data insights. Visibility into what’s happening in the field improves productivity and communication, reduces operational costs, and helps maximize customer experience throughout the service cycle. The right mobile workforce management solution can deliver these results—enabling service organizations to focus on the business of field service delivery and customer engagement.

THE REAL VALUE OF MOBILE UPDATES FROM THE FIELD

The data that is provided from the field through real-time status updates provides insights for planning and scheduling. When scheduling field technicians, a mobile workforce management solution with scheduling optimization takes into consideration the planned duration of the scheduled task. The planned duration is the expected time it takes to complete a job. This helps to make the schedule as accurate as possible at the beginning of the day.

In most cases, the planned duration will differ from the actual duration as changes can occur that alter the planned schedule as the day progresses. This is when mobility makes a difference. If a discrepancy between the planned duration and the actual duration occurs, the mobility solution will enable field resources to update the planned duration while on site. This update may occur at the start, middle, or end of the job.

To illustrate the value of updates from the field through a mobile workforce management solution, let’s use the example of a service call involving a lamp’s lightbulb that isn’t working. We will set our planned duration for 60 minutes.
Here are two scenarios where the planned duration may be updated at different times during the duration of the job:

**Scenario #1:** The technician arrives on site and notices that the lamp is not plugged in, which is a simple fix. At the start of the job, the technician shortens the planned duration to 5 minutes, plugs in the lamp, and closes out the job using his mobile device. As for the remainder of his day, jobs are pushed forward allowing room at the end of the day. The dispatcher can also check for nearby work in the schedule and fill the idle time using smart scheduling tools that use the scheduling logic defined by the service policy to identify the optimal job for his skills.

**Scenario #2:** The technician arrives on site, confirms that the lamp is plugged in, changes the light bulb, checks the circuit breaker, replaces most of the lamp components, and then realizes that he is about to exceed the planned duration. On his mobile device, the technician extends the job by 15 minutes so that he can clean up and provision a new follow up job to replace the wiring in the wall. This update occurred at the end of the job. Again, the remaining jobs for the day are optimized by the workforce management solution as in the first scenario.
The value of the adjustment of planned durations comes from the ability of your workforce management solution to re-optimize work based on the updated durations from the field. In short, the updated job durations from the field allow the solution's optimizer to have a true sense of the in-day schedule and make scheduling adjustments based on the defined service policy. This impact is even more powerful with companies that drip feed work to their field resources. Because the schedule is continuously optimized, jobs can be assigned to available resources and completed—helping to drive revenue and maximize ROI.
ENSURING UPDATES FROM THE FIELD

One of the biggest challenges within mobility is ensuring the field resources update their status throughout the day to ensure that the schedule is optimized to its fullest. This can easily be done in the mobile workforce management solution with predictive and proactive text messages that drive status updates. These are predefined, time-based, or context aware messages that are delivered to the technician’s mobile device, prompting action, such as:

• “May I change your status to en route?”
• “Your status has changed to en route. May I pull up directions to the customer site?”
• “You have arrived on site. May I change your status to on site?”
• “This job is scheduled to end in 5 minutes. Would you like to extend the duration by 15 minutes?”

For each of these prompts, the field resource simply clicks on “yes or no” and the mobile workforce management solution does the rest. The value is delivered in these areas:

• The field technicians no longer call in to the dispatch center to update status. This keeps the technicians focused on their job in the field and reduces the administrative burden on the dispatch center as well as telephone costs.
• Real-time status changes are achieved, yielding accurate duration reporting which increases in-day workforce optimization.

All of this drives the schedule to focus on business goals and maximize ROI.

HISTORY SHAPES THE FUTURE

Considering the importance of planned job durations, it’s important to look at the historical planned duration reporting. This can be done with the workforce management software by field resource, by work type, by customer, by skill type, by geographic region / district as well as other criteria to help fine-tune the planned durations.
For example, if our planned duration for the lightbulb repair job is set to 60 minutes for all field resources and they consistently take 30 minutes to complete the job, we can shorten the planned durations for all technicians to 30 minutes for this work type.

As a result, 30 more minutes of scheduling space is now available within the schedule for each technician! This extra room permits more work to be scheduled, resulting in higher levels of optimization (more jobs and more resources = improved optimization) and opportunity to generate revenue. On the flip side, if lightbulb repair consistently takes 90 minutes instead of 60 minutes, an adjustment can be made to accommodate the extra time and eliminate the in-day adjustments to the schedule, which can translate into late arrivals or even missed appointments.

**EFFICIENCY RATINGS DERIVED FROM THE FIELD**

In addition to planned duration adjustment, actual duration reporting can be used to designate an efficiency rating to each field resource. Using the example of the light bulb repair request, consider the following efficiency ratings:

<table>
<thead>
<tr>
<th>Technician</th>
<th>Assigned Efficiency Rating</th>
<th>Planned Duration</th>
<th>New Planned Duration</th>
</tr>
</thead>
<tbody>
<tr>
<td>New</td>
<td>2</td>
<td>60 min</td>
<td>120 min</td>
</tr>
<tr>
<td>Experienced</td>
<td>.5</td>
<td>60 min</td>
<td>30 min</td>
</tr>
</tbody>
</table>

Efficiency ratings should be derived from accurate actual duration results. The only way to obtain these results is through accurate status updates from the field. Using efficiency ratings helps to schedule the right technician to the right job and maximize available field resources.
MAXIMIZING THE CUSTOMER EXPERIENCE

Visibility is also extended to the customer through the mobile workforce management solution. Customers are provided with real-time technician monitoring on a map, can reach out to the technician directly when the field resource begins traveling towards the job site, and receive notification when the technician’s vehicle has arrived. This helps to reduce administrative costs associated with dispatchers having to field technician status inquiry calls and improves both customer and employee satisfaction.

The customer experience is further enhanced with the visibility that the mobile workforce provides to the technician. With mobility, the technician can get the right information about the job, the customer, the asset history, complementary products and services, and even others in the field who can assist when need—all while on the job site and without making a phone call to the dispatch center. From the customer’s perspective, the technician is viewed as knowledgeable because they have the data, the skills, and the tools to solve the issue at hand.

GAINING TRUE VALUE

To sum up, a mobile workforce management solution provides value through real-time insights driven by full visibility. But to obtain the most value from your mobile workforce management solution, optimization is required. Driving status changes with context-aware notifications, adjusting planned durations based on historical reporting, applying efficiency ratings, and enabling customers to track and communicate with technicians will improve optimized results—driving down costs while improving revenue generation, customer experience, and employee satisfaction.

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