FieldAware™

Field Services...Managed!

PREPARE TO MOBILIZE

10 FIRST STEPS

INTRODUCTION

A recent study by CIO Magazine found that workers using mobile devices increase productivity by an average of 9 hours per week. They also found that 87 percent of CIO's cited productivity gains as the reason behind their investments in mobile technology.

Field service organizations are well aware of the potential business benefits of mobile devices - especially when combined with a made for mobile, cloud-based field service management solution (like FieldAware). Benefits like:

- Increased productivity

- Improved profitability

- Greater customer satisfaction

The benefits are certainly very appealing. But to get the most out of an investment in mobile, field service management, it's also important to prepare the people, processes and systems that will be touched by that mobile technology.

At FieldAware, we've helped a number of companies to successfully leverage mobile devices and our made for mobile, cloud-based field service management solution to achieve impressive growth in productivity, profitability and customer satisfaction. In the process, we've established ten first steps that can help ensure that our customers reach their business improvement goals.

STEP ONE - VERIFY

The first, and perhaps the most important step in any mobile, field service management implementation is to identify the people, processes and applications/systems

Workers using mobile devices gain an average of 9 hours per week in productivity (CIO Magazine).

that will be affected by the solution. This is a key step that helps eliminate implementation and integration "surprises" that can derail implementation and delay profitability and productivity gains.

STEP TWO - BUILD A TEAM

Once the affected people, processes, applications and systems have been identified. The next step is to build a team comprised of stakeholders that represent those people, processes and systems. It's important that the team maintain open communications as a group - and with areas of the business that they represent.

It's also critical that team members have decision making authority that enables them to modify processes, upgrade applications or systems and address key issues (like the implementation plan itself, training, testing, etc.) as they arise. At FieldAware, we've found that companies that build the good teams, with the most autonomy, get the best results.
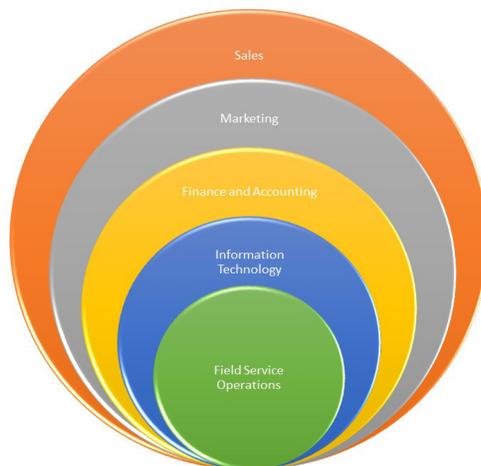
STEP THREE - DEVELOP A PLAN

This step may seem obvious, but preparation of a comprehensive implementation plan can sometimes get overlooked when team members are managing multiple priorities. We recommend that companies designate a project manager as the "owner" of the plan and responsible party for notifying the team, and executive management, when any project benchmark date is in jeopardy.

We also recommend that the project manager serve as the single point of contact for communication with providers of mobile devices and the field service management solution.
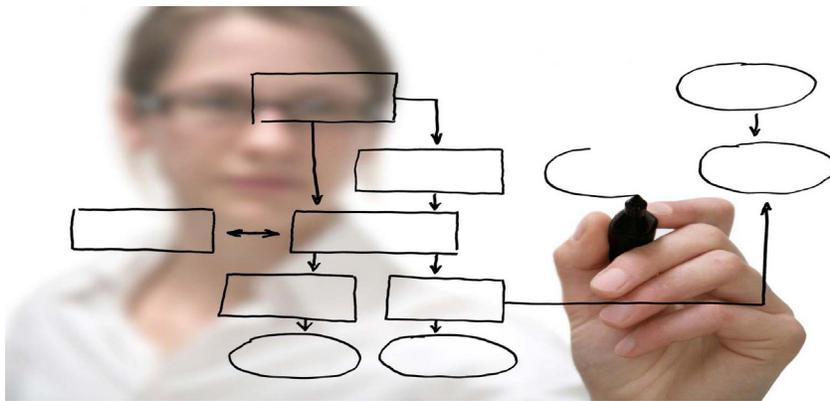
Step Four: It's just as - or more important - to prepare your people for the move to mobility as it is for existing systems and processes.

STEP FOUR - PREPARE FOR CHANGE

Once the plan is in place, it's time to prepare everything and everyone for change. If the mobile field service management solution will integrate with an existing ERP, CRM or accounting system preparation will probably include development of an API connection between the systems. If security and management of the mobile devices is important, implementation or upgrades to an existing mobile device management system (or service) might be in order.

Changes to processes will need to be outlined and documented. And last, but not least, the coming change needs to be communicated to the people who will be affected - in the field and in the office. At FieldAware, we've found that the companies who have taken the time to inform have higher user adoption rates and achieve higher returns on their mobile field service management investment.

STEP FIVE - REVIEW

As the implementation plan goes forward, it's a good idea to include periodic progress reviews. Often these reviews uncover systems and processes that must be upgraded or changed to accommodate mobile field service management that weren't discovered in the initial verification process.

Reviews also are good for eliminating project road blocks, finalizing decisions on interdepartmental process modifications and assigning responsibility for new tasks.

Project Review Item	Notes	Result of Review
Review the objectives of the project and clarify the major objective(s) of this review session.	Revisit the problem statement.	
Have any reviewers been invited for a specific reason?	Focus on the invited reviewers' issues first.	
Review the status of the project against the plan.	Preferably, the project team will have the project planned using a PERT chart.	
Is a mid-course correction necessary?	If a correction is deemed necessary, will the project still be within the scope defined by the Problem Statement?	
Are there any open (old) project issues?	What is the planned action to resolve each old issue?	
Are there any new issues?	An action plan, including collecting relevant data is needed for each new issue.	
Are old obstacles being dealt with effectively?	Check the perspective of both the team and the champion.	
Have any new obstacles surfaced?	The champion takes the lead here.	
What are the next project milestones?	Be specific.	
When is the next review session?	Set the date, time and location.	

Step Six: Work with your provider to determine the best ways to leverage their system to meet the unique needs of your business.

STEP SIX - DESIGN AND CONSTRUCT

In step six the "rubber meets the road". It is at this time that the system is tailored to meet the unique needs of the business and where all processes, existing and new data sources are integrated to produce a mobile field management system that delivers double digit improvements in productivity and profitability.

At this point, it's essential to work with the mobile field service management solution provider to determine the best ways to leverage their system in your environment. System configuration, roles and rights of users, custom fields and, where integration with an existing CRM, ERP or Accounting system is required, configuration of the API are just some of the areas where the provider can help.

Once the system has been configured, a good next step is to create a mock-up of the system. Take a sample of some existing electronic data and load it into the now configured system. Does the system meet your requirements?

The mock-up also helps eliminate problems later by ensuring that:

- There is a proven template for all existing data uploads

- Back office, mobile and user configurations as well as API and roles and rights settings are correct

If the mock-up system is on target, existing electronic data is now uploaded and it's on to step seven.

STEP SEVEN - TRAINING

Companies that have the most successful mobile field service management implementations are those that take the time to train end users. Whether it's back office personnel (schedulers, dispatchers, accounting), management (dashboards and reporting), IT (API settings) or field technicians (mobile apps); training drives end user acceptance and rapid application adoption.

At FieldAware we recommend that end user training include a combination of:

- On site training by the mobile field service management solution provider

- Train the trainer (again by the provider)

- In-house training (new processes and applications)

- Web-based training (videos, online documentation and "how tos")

This combination of training delivery methods accommodates not only a variety of learning strategies, it is also very cost effective.

Step Seven: Training is essential to end user adoption - and realization of the potential productivity and profitability gains of a mobile field service management system.
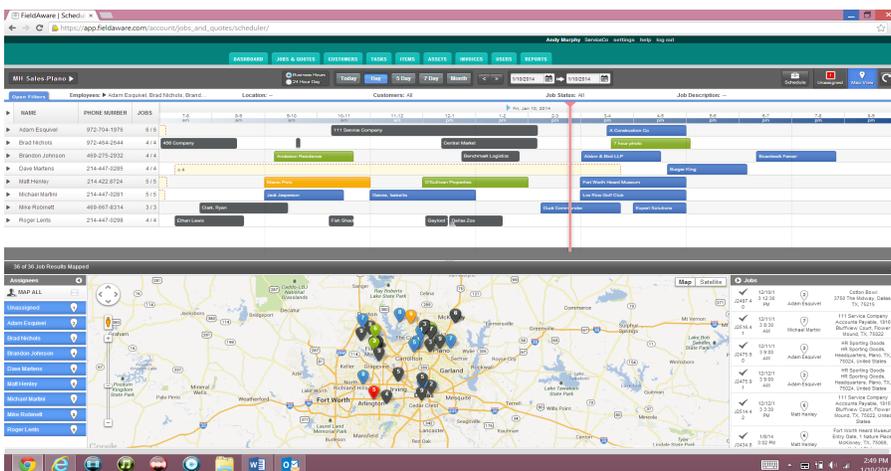
STEP EIGHT - TEST

Before rolling the system out, test it using a "select" user community (field, back office, management). Make sure that the system performs as expected and that any new processes are efficient as well. If there are any "kinks" in the system or processes, take the time to work them out, then retest to ensure that any problems are fixed.

STEP NINE - LAUNCH

The system has been tested and the users trained. It's time to roll it out - and begin taking advantage of the business benefits that a mobile field service management solution can bring. In working with our customers, FieldAware has found that during launch, it's important for companies to continue to communicate the business - and personal - benefits of the system to everyone involved.

Remind technicians of:

- The time they'll save

- The number of paper forms they won't have to fill out, maintain and file

- How easy it is to use - and get the information they need, when they need it

Schedulers and dispatchers will love how easy it is to create, schedule and dispatch work orders - and view the status of them in real time.

Managers will have instant access to the status of every job and every technician as well as insight into the profitability of jobs, the productivity of technicians and much, much more.

And make sure to get feedback from users. What is good? What can be improved? This feedback is essential for the step.

STEP TEN - REVIEW

After thirty days (and every month thereafter) it's important to review all processes and the configuration of the mobile field service solution to ensure that they continue to meet the needs of the business. Today's fast moving business environment means that markets and service requirements can change and new competitors arise almost overnight.

It's therefore important to maintain a process that reviews:

Step Eight: Test the system with a "select" user community to work out any "kinks".

- Additional users

- Changes to ERP, CRM or accounting system integration (API settings)

- Changes to existing or new processes

- New services, tasks, equipment supported

- New features in the mobile field service management solution

A monthly review process (in concert with the mobile field service management provider where necessary), helps you're getting the most from the solution and can, in many cases, be used to glean ever increasing benefits from it.

Implementation of a mobile field service management solution is an important step in increasing the productivity of your staff, growing revenues, improving customer satisfaction and retaining skilled employees. We hope you'll find our "10 Steps" a useful guide in preparing your business to "go mobile".

ABOUT FIELDAWARE

We are re-shaping the field service industry! Our made-for-mobile, cloud-based software was designed from the ground up to provide ease of use with incredible flexibility – a combination that enables field service organizations to amaze their customers, astonish the staff and surprise the competition. Our software was architected as a mobile platform, with no incumbent legacy technologies.

Based on our founders' intimate knowledge of the unique needs of engineers and technicians in the field – and the operational personnel and management that support them – FieldAware is focused on providing field service organizations, both large and small, with:

- Intelligence about your Customers: So you can increase revenue, expand into new markets, differentiate your services and create customer advocates.

- Intelligence about your Business: That enables you to increase the productivity of your staff (and keep them happy!), use company resources more efficiently, simplify your business processes and "right size" your parts and repair inventory.

- We combine our software with the industry's best implementation, on-boarding and support services enabling companies to take full and rapid advantage of today's mobile environment.

- To learn more about our solutions or to schedule a demo, contact your local FieldAware representative at fieldawaresales@fieldaware.com or by calling 800-935-0736.