Six steps to field service excellence

Driving field workforce productivity

advanced

People. Partnership. Solutions.

Field service management software

Above industry-average productivity improvements

On average, organisations see a 20 per cent improvement in productivity when they implement our field service management software.

This productivity boost is achieved by leveraging the power of an integrated dynamic scheduling and a mobile working solution. This software reduces travel and idle time, streamlines processes and ultimately increases the number of jobs or visits completed per day, per field worker.

We enable our customers to not only aspire to best practice but to effortlessly make best practice the way that they work, every day.

It is not only the initial step-up in productivity that our customers benefit from. According to recent research*, 45 per cent of field-based workers (within organisations not using solutions from Advanced) said their main frustration is that their current tools are not fast enough.

More than a third (38 per cent) said they can't access all of the information they need.
Addressing these frustrations as part of improving efficiency is key. The survey also revealed 72 per cent of organisations are prioritising improvements in customer satisfaction in field service.

So how are organisations planning to improve efficiency and customer service?

Let's look at the six steps to achieving field service excellence.

20%

The average productivity improvement gained by our customers through the implementation of our field service management software.

70%

The productivity improvement seen by Vodafone Ghana since using our field service management software.

* Field Technologies Online, 3 Stats That Will Have You Rethinking How You Do Field Service and Prioritizing Top Field Service Strategic Initiatives

1. Making scheduling dynamic

Right people, right jobs, right time

For many years field service organisations have relied on rostering to ensure shift patterns are aligned to work demand, but real productivity gains can only come when making the step-change to dynamic scheduling.

Rostering and dynamic scheduling both ensure you have enough people, in the right location, to meet projected demand. And both will allow you to drill down to specific times of the day to devise and allocate shift patterns, to extend hours covered and maximise coverage during peak hours.

However, there are differences between rostering and dynamic scheduling. Rostering ensures that you have enough people to fulfil the demand at any point in time; dynamic scheduling ensures the right people are allocated and are doing the right jobs at the right time.

Right people, right tasks

Scheduling enables you to take all criteria into account when allocating work, such as location, skill set, qualifications, accreditations, equipment and even language. This enables a fundamental shift from having someone available to do a task, to having the best resource for that specific task. This reduces time while increasing customer satisfaction.

More tasks per day

The order in which work is scheduled and allocated can also have a significant impact on productivity. Scheduling workers with the shortest route between jobs can minimise travel time and maximise productivity. Avoiding urban areas at rush hour can reduce time spent on the road, while ensuring appointments are kept can avoid the wasted visits when the workers cannot access a property or asset.

Minimising travel time

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Billions of planning scenarios

The number of possible combinations of how each job could be allocated if 100 workers carry out five jobs per day.

2. Minimising travel time

Increasing your field workforce productivity

Reducing each field worker's travel time by just 10 per cent per day can enable them to complete an average of one extra job each day.

For field service organisations, travel time can be the greatest source of productivity leakage. Finding ways to reduce travel time is essential and, for each minute saved, this directly increases the productivity and efficiency of your field workforce.

Although there are many tools available to assist with route planning, we strongly recommend that journey planning needs to be comprehensive and fully integrated into the scheduling process.

Booking appointments based on route
Taking travel time into consideration when booking appointments can help avoid many issues at the outset. By having an intelligent scheduling solution that not only looks for available slots, but can also identify the optimum slot, appointments can be offered to customers that have the least travel time associated with them.

As-the-crow-flies vs actual distance
Many scheduling solutions use geographic plotting to calculate the proximity of jobs, and some only calculate as-the-crow-flies distances between jobs. That's often significantly different to as-the-vehicle-drives distances. The best scheduling solutions consider the street-level road route between jobs (and therefore the actual travel time) in order to accurately calculate and minimise travel time.

Leveraging real-time information
Road works, peak hour congestion and road closures can all significantly impact journey time. Having access to this intelligence whilst scheduling work can make a big difference. Avoiding built-up areas at rush hour, planning routes around major road works and rerouting based on known incidents can ensure your field workforce avoids unproductive time sat in traffic jams or following diversions.

⬆ 36%

South Gloucestershire Council saw a 36 per cent rise in jobs completed per day (from 11-15) after implementing our Job Manager mobile workforce management software.

3. Reducing no-access rates

Connecting the customer and field worker

An efficient schedule drives productivity improvements, but only if customers keep appointments and field workers are able to gain access.

The best made plans can quickly become inefficient if field workers travel to customer locations only to find that they are unable to gain access, cannot make a delivery or the customer is unavailable for their appointment.

A key factor in driving productivity improvements is reducing the number of these instances. This is best achieved through customer-driven appointments and seamlessly integrating customer communication within your scheduling software.

This improves workforce efficiency, reduces no-access instances and increases the number of kept appointments — which all boosts customer satisfaction. Here are three ways it does this.

1. Appointing work

Appointing work to the field service staff member not only improves customer satisfaction, but also enables clarity of when your field worker will be with the customer — reducing the probability of no-access. Ensuring that you set appointments in an optimum way enables you to gain the best of both worlds: more efficient use of resources and more jobs completed.

2. Appointment confirmation

Having a scheduling solution that can automatically send an appointment confirmation to the customer, either by email or SMS, can significantly increase the number of appointments kept and reduce the number of no-access instances.

3. Real-time updates

Things don't always run to plan, and delays happen. By using dynamic scheduling software when communicating with customers, they can be kept informed about when to expect your field worker. If delays happen, then the customer can be instantly notified when the field worker will be en route. Such updates increase the likelihood that the customer will keep their appointment and reduce no-access rates.

72%

The proportion of organisations prioritising improvements in customer satisfaction in field service*.

*Field Technologies Online, Prioritizing Top Field Service Strategic Initiatives

4. Streamlining workflow

Transforming field service management

Repetitive, laborious tasks like paperwork, rekeying data and manual workflows are all detrimental to the productivity of your field workforce — and so is not having access to key information.

Although equipping field workers with mobile devices is commonplace, many applications do not fully integrate with back-end systems; nor do they fully eradicate paperwork or streamline processes. This is often due to the perceived complexity of integrating systems and devices. But, in our experience, integration does not have to be complex nor costly. Plus, the benefits of having a seamless mobile working solution far outweigh the investment required. Here's why.

A connected workforce

When mobile working is combined with dynamic scheduling, the management of field-based activity is transformed. Managers gain an up-to-the-minute view on activity and progress against schedule. If work overruns, this can be instantly taken into account by the scheduling application, and the day's schedule can be adjusted in the moment. In addition, field workers can instantly book repeat visits, order parts or schedule a follow-up visit direct from the field, which streamlines processes and connects the entire workforce.

Faster processes

By enabling workers to electronically capture information in the field, including photos and signatures, they can immediately post that information into back-end systems, automatically triggering the next step in the process. This not only speeds up processes, but reduces mistakes. It also eliminates the need for field workers to return to base to submit paperwork.

More first-time fixes

By providing field workers with all the essential information they need to complete more tasks first time — including instant online access to customer history and knowledge bases — you reduce the average time they spend on-site, and significantly increase the number of first-time fixes.

35%

North Lanarkshire Council's productivity per operative increased from 5 hours per day to an average of 6 hours 45 minutes per day, a 35 per cent improvement.

5. Handling the emerging day

Rescheduling on the fly

A major challenge for field service organisations is dealing with the unexpected, without reducing productivity or letting customers down.

Every day, field service organisations must deal with unexpected occurrences, from appointments getting cancelled and tasks overrunning, to field worker delays while travelling. This means that even the best scheduling can fail, and that affects productivity.

This is where field service organisations that use dynamic resource scheduling can gain a significant advantage over organisations that merely rely on daily planning, scheduling or rostering. Here's why it's so important.

Real-time visibility

To dynamically take the emerging day in your stride, it's essential to have real-time visibility over what is happening in the field. When field workers get delayed travelling to a location, you need to know the knock-on effect of this.

The same is true when jobs overrun or a field worker cannot gain access. This real-time visibility enables you to constantly review the schedule and dynamically optimise throughout the day.

One task at a time

By seamlessly linking your mobile working application with your dynamic scheduling application, it is possible to move work allocation to a single task at a time. This enables far more flexibility than a daily job sheet. It enables you to reschedule work across your team to accommodate changes in availability or task demand. Through automation, you can reschedule activity on the fly so that exceptions are not just accommodated, but placed into the schedule in the most efficient and cost-effective way.

Capacity Vs Demand – analysing the correlation of demand to resources available and understanding how this is trending over time and how this fluctuates seasonally, across the week and even across the day. This enables better resource planning and shift optimisation.

Geographic Coverage – understanding the geographic distribution of work and mapping this onto the location of the field workforce. Understanding and exploring scenarios to geographically re-distribute field workers to remove cross territory travel.

 46%

Grand Union Housing Group increased the number of scheduled visits for its repairs and maintenance teams by 46 per cent, equating to 28 more jobs per day, after deploying Dynamic Resource Scheduler (DRS).

6. Leveraging actionable insight

Using data to maximise productivity

Analyse data, learn about trends and benchmark performance to gain year-on-year productivity improvements.

Having access to comprehensive insight is key to driving continuous improvement. We always recommend leveraging the information available from dynamic resource scheduling and mobile working applications to drive productivity. Acting on this insight to make changes, and measuring the impact of these changes, enables you to maximise productivity improvement. You can do that in four ways.

1. Field workers

By benchmarking the productivity of individuals with their peers and identifying trends in performance, you can highlight weaknesses to help ensure that every field worker is delivering to their full potential.

2. Task types

When you measure workforce productivity by work type, you understand why some tasks take longer than others. You can identify causes for overruns on certain tasks, which means you can put measures in place to improve efficiency.

3. Capacity and demand

By learning about the correlation between workload demand and resource capacity (and how this fluctuates across each day, week, month, season or year) you can improve resource planning and optimisation.

4. Geographic coverage

When you can map the geographic distribution of work onto field workforce location, you can explore scenarios for reallocating field-based staff to reduce cross-territory travel.

£500k

Annual savings of South Gloucestershire Council after deploying Job Manager.

The key to productivity?

Field workforce software

Field service management software helps organisations improve productivity, maximise profitability, and deliver the best value for customers.

Improving productivity not only ensures that your field service organisation maximises profitability and delivers best value for money, it also positively impacts customer satisfaction. By leveraging our DRS and Job Manager solutions, organisations that we work with see an average 20 per cent uplift in productivity.

These organisations also see a reduction in no-access visits and administration overheads, alongside an improvement in first-time fix rates and customer satisfaction.

As a result, their field service activities become more predictable, as do performance levels. Every aspect of work can be measured and analysed while lessons can be learned to continually drive improvements.

97%
The percentage of jobs Bernicia Group is now appointing with the customer at the first point of contact with DRS.

100%
The customer satisfaction rating for Phoenix Community Housing in its tenant survey after implementing DRS.

About Advanced

Driving productivity, insight and innovation

We enable our customers to achieve increased efficiencies, savings and growth opportunities through focused, right-first-time software solutions that evolve with the changing needs of their business and the markets they operate in.

As the third largest British software and services company in the UK, we help organisations create the right digital foundations that drive productivity, insight and innovation – all while remaining safe, secure and comp liant.

Our solutions for both commercial and public sector organisations simplify business challenges and deliver immediate value, positively impacting millions of people's lives.

Journey to the cloud

We have a strong track record in helping our customers' journey to the Cloud. We manage private, public and hybrid Cloud environments as well as deliver sector specific Cloud-based solutions and services. We are certified partners with Amazon Web Services (AWS) and Microsoft, and have achieved the highest levels of accreditations. Our Cloud solutions are used by organisations of all shapes and sizes including Highways England, Performing Rights Society (PRS) and Aspire Furniture.

Field service management

Our field service management software solutions help our customers streamline their service to increase job capacity, reduce overheads and improve customer satisfaction.

More than 40,000 field workers rely on our software to undertake their work every day, and over £20m has been spent in research and development of our product. Our applications can be fully integrated with their existing infrastructure, or rolled-out as independent solutions, with the option of being hosted in the Cloud.

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