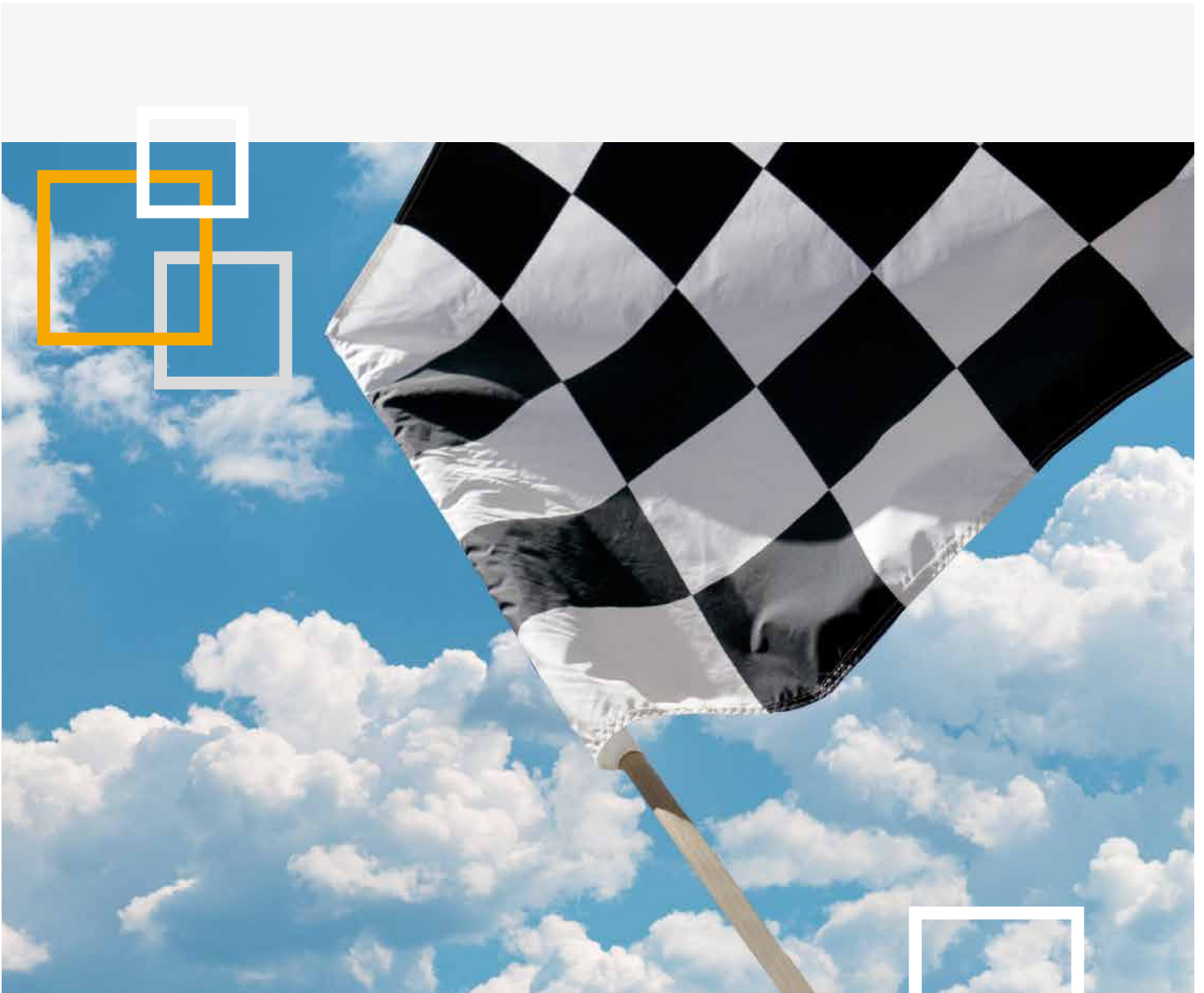**ClickSoftware**

Making Service Click

8 Key Benefits of Cloud-based Mobile Workforce Management

A brief look at current trends and the real business benefits behind adopting a SaaS solution for the automation and management of a mobile workforce.

A ClickSoftware Business Paper

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Peeling Back the Layers

For businesses within the field service industry, the core business is centred around mobile workers, their connection to operations and, at the end of the day, customer service levels that guarantee repeat business, on-time payments or that much needed referral. Businesses in this sector are constantly striving for increased workforce productivity, higher first time fix rates with lower fuel and parts costs.

Understanding and realising a need to change isn't always apparent, but benchmarking against other businesses in the sector is increasingly popular and can prevent an organisation from missing out on critical opportunities that can mean the difference between growth or stagnation.

Once you start to look at your current methods for managing, scheduling and communicating with your field workforce, the opportunity for adopting a technological solution will become rapidly apparent. Start to peel back the layers and you may discover institutionalised inefficiencies that can provide opportunities for improvement that you didn't even realise existed.

Streamlining these processes and having constant and instant contact with your workforce will differentiate your company from the competition and set you firmly on the road to continuous success and growth.

Current Trends in Scheduling

In a recent survey, IDG found that 41% of companies rated their mobile service force as being "extremely important", with a further 33% saying "important"[i]. Combined that's a rating of 74%.

So with such an astounding importance rating—nearly 75%—how are companies ensuring that they are getting the most from their mobile workforce? How are they currently handling the day-to-day scheduling, management and communications?

The answer isn't all that astounding. A vast majority are maintaining a schedule manually, using a spreadsheet, whiteboard, or traditional/basic software-based calendar. The methods in place today are most likely the methods that got the company off the ground to start with. However, an increasing number of mobile employees and jobs per day means an increasing complexity in the scheduling possibilities.

Here is a basic example that looks at the possible permutations when it comes to scheduling. If an organization has five mobile resources, each completing five jobs a day, then there would be 3,125 permutations of the schedule. Even at this basic level the inherent complexity of scheduling is apparent. That said, manual methods for scheduling, even though tedious and time-consuming, can still be used with success.

If we expand the growth of our example company from five mobile resources, to one hundred, each completing five jobs a day, then you are faced with ten billion different permutations of the schedule.

Again, this scenario is basic and based solely on one resource completing one job at a time. It fails to take into account any real world complexities—key factors such as job duration, location, materials or skills required. Once these factors are added to the mix, the current trend of scheduling by manual methods quickly becomes an unrealistic task to complete, in a timely and efficient manner.

Even if a schedule could be created, placing your mobile resources at the required jobs at the required time, what would happen to that static schedule once unforeseen complications arose? How quickly and accurately could it be adjusted?

All the effort of creating a daily schedule would be lost if just one resource were to call in sick. How much time would need to be spent to re-create the schedule mid-day, when an appointment is canceled, doesn't show or over runs? You'll have office-based team members scrambling to match up appointments, a frustrated field team, and upset and unsatisfied customers buried under a mountain of inefficiency.

Current Trends in Mobility

Mobility

Scheduling sets the stage for the mobile workforce. It is the backbone on which to build a strong mobile strategy. And because field service organizations run on mobility, the two are largely inseparable.

But how is mobility handled today, and how many organizations have a clear strategy? For many organizations a gap has developed between technology and how effectively it is used. Over the past five years, companies have replaced mobile phones with smart phones, making a significant hardware investment. Smart phones allow for instant access to a wide range of information by simply opening a browser and doing a simple search. If 'knowledge is power' are employees making the most of this? Is open access really providing them with the right information they need to complete the task
at hand?

"Last year, Forrester's Forrsights Workforce Employee Survey asked nearly 10,000 information workers in 17 countries how many devices they were using for work purposes, including personally-owned devices. About 74 per cent used two or more devices, and 52 per cent used three or more."[ii]

For the vast majority, mobile devices are being used for several key functions:

• Accessibility and communications between the mobile worker, the back office and the customer via voice, text and email

• Easy access to the internet for information

• Ability to utilize maps and navigation

The main issue with these functions is that they are not integrated. Opening and closing applications, cutting and pasting, as well as the manual entering of data is often required, which takes time and increases the chance of errors.

Mobile Analyst Kevin Benedict in his 2012 Mid-Year Enterprise Mobility Survey[iii] discovered that only 8% of companies said that developing an enterprise-wide mobility strategy was "not challenging", leaving the other 92% finding it challenging at various degrees.

Challenges, however, lead to opportunities; once a clear strategy is in place; mobile users are able to harness the true potential that technology allows.

The 8 Key Benefits of a Cloud-based Mobile Workforce Management Solution

Taking advantage of a mobile workforce management solution will place your company firmly on the road to continuous success. Below are eight key benefits to moving to a mobile workforce management solution:

1. Automation

Scheduling tasks manually requires a lot of time, effort and information. By moving to an automated solution, you not only cut down on manual processes, but you also free up employees for greater tasks.

Schedule optimization technology simultaneously considers numerous strategic and operational constraints when scheduling a resource. As such, it can consistently ensure that the best resource with the right skills and the right tools gets to the customer at the right time to achieve your goals. Through 'drag and drop' functionality, auto-scheduling can be based on availability, location, skills set and more. Some solutions even offer the ability to have the schedule automatically affected by a defined service policy.

Automation is handled by background processes that work against a rule set unique to an organization's needs and goals and can, for example, be conducted overnight. This way the schedule is optimized after business hours and is ready for the next working day. The dispatcher then only needs to address exceptions during the working day.

2. Visibility

In a 2012 survey, IDG discovered that 63% of companies say that communication and visibility of issues on remote sites is 'extremely important' or 'important'. Mobile Workforce Management solutions can provide an unparalleled layer of visibility into the day-to-day operations of the field.

It's important not to look at this as a 'Big Brother' movement but rather the integration of field resources back into the greater company. The added visibility of using a solution ensures that the experiences and intelligence from the field is communicated back to the office in a timely manner, without being perceived as 'red tape' or 'paperwork'.

With a Mobile Workforce Management solution, field technicians can:

- Report their working hours
- View service history
- Accept or reject job dispatches
- Record work performed
- Capture equipment or customer information
- Manage spare parts

This not only benefits the back office with clear information and timely reporting, but also grants the field technician with the visibility and insight into the customer that he or she is visiting. This added level of visibility allows the technician that is onsite to provide a more personalized service, by using data to:

- Communicate effectively with the customer
- Understand the details of the job
- Suggest upsell opportunities and offers unique to each customer engagement

3. Productivity & Efficiency

So with this new found ability to automate and have visibility across the field and back office comes the added benefit of productivity and efficiency. However, simply implementing an automated scheduling and mobility solution is not enough. The real benefit comes from having one complete and integrated solution for dispatchers, mobile workforce, supervisors and managers.

The 8 Key Benefits of a Cloud-based Mobile Workforce Management Solution

Having one solution to manage the lifecycle of a service call—from initial customer contact, through work order creation, resource scheduling, dispatch, to real-time updates from the field and managerial reports—ensures that everyone has access to the information they need to make correct and timely decisions. This also means the seamless passing of data between departments and across different devices, including: desktops, laptops, smart phones and tablets.

Additional efficiency can be gained through the optimal use of resources; again through an end-to-end solution, with advanced scheduling and decision-support capabilities. Advanced scheduling can also provide the right balance needed to execute the high priority jobs with routine maintenance jobs—making certain that the low priority work still gets done while maintaining operational efficiency.

Again this new found efficiency and increased productivity has a knock-on effect, which ultimately results in an overall improvement in the customer experience.

4. Improved Customer Service Levels

Customer service is the heart of any field service organization, and the benefit of using a solution to manage the mobile workforce can have a huge impact. Customers benefit from the company's ability to offer and deliver higher service levels through:

- Immediate appointment booking, with firm commitments based on reality

- Increased flexibility and options available at the point of booking and rescheduling appointments

- System ensures the field technician scheduled has the correct resources and skills required—directly increasing first-time-fix rate

- Providing customers with upsell and unique offers or incentives that are based on their existing service

These improvements in service lead to increased customer satisfaction and loyalty.

"Customers will pay top price for top service; deliver anything less than top service and you end up in a price war." Director of Sales, Small IT Services Company

5. Alignment with the Business Objectives

As touched on in the benefit of 'automation', configuring and enabling the schedule to be affected by the business objectives can have significant value to the business. As inevitable changes occur to the schedule though the availability of resources and the ever changing number of jobs, the solution can automatically adjust the schedule to best reflect the business goals.

This feature not only vastly reduces the effort needed to adjust and produce an accurate schedule, but at the same time ensures adherence to the defined schedule policies and optimizes v the allocation of field resources based on the business' desires.

It is recommended to select a workforce management solution provider that has experience and an understanding of the service market to ensure that business rules, goals and values are integrated into the service policy and are used to guide scheduling processes.

The 8 Key Benefits of a Cloud-based Mobile Workforce Management Solution

The quality of the schedule can be defined based on several key criteria:

- **Scheduling Value** – Measure of work revenue

- **Travel Time Cost** – Costs for resource travel

- **Delivery Cost** – Use of regular/overtime/idle time in the schedule

- **Time Utilization** – Comparison of total available time to total work time

- **Service Quality** – Compliance with service date/time commitments

Additional policies can affect resource availability and should also be evaluated and taken into account; they include:

- **Definition of Lunch Breaks** - Allows global or individual definition of lunch breaks (assigning a lunch period and duration for each resource so that the solution can allocate time within the schedule for the appropriate break)

- **Allow use of Optional Time** - Provides a means for allowing use of potential overtime hours when offering schedule options and optimizing the schedule

- **Coverage Area Definition** - Defining the field coverage per individual resource

- **Soften Territory Boundaries** - Permits field resources to cross over typical territory boundaries to complete work, in order to make better use of field resource availability

- **Contracted Resources Policy** - Define how contracted resources are considered when producing the schedule

6. Business Intelligence

Providing up-to-date information to decision makers is key in achieving an organization's business goals. Perhaps this is stating the obvious, but implementing the analytical tools necessary to provide this level of information within a service operation can be very challenging. And having the right tools is more than half the battle.

Even in the best service organizations, problems and/or problematic trends spring up. The sooner these problems are detected; the better off the organization will be in correcting and subsequently preventing them. To do this, companies need to be monitoring key performance indicators (KPIs) on an ongoing basis and keeping track of historical performance information for future use.

A Workforce Management solution with ready-to-use reports can provide a detailed insight into service operations and support for a streamlined decision-making process. Monitoring KPIs can catch potential gaps in the organization before they have become too costly or have too heavily impacted customer service levels.

7. Competitive Edge

To remain competitive in the marketplace, service organizations need to constantly strive to cut costs and grow revenues while increasing customer satisfaction. Each of the six benefits can positively affect the competitive edge for a growing company of any size. By providing a complete and positive customer experience, your customer will remain loyal, provide repeat business and hopefully recommend your services to others.

The 8 Key Benefits of a Cloud-based Mobile Workforce Management Solution

Technicians and dispatchers will operate with greater efficiency and will feel more satisfied in their roles, taking more pride in their work and the greater organization they are a part of.

The business will have increased visibility and access to the data required to make impactful decisions that are based on fact and not gut. With all of these combined the competition won't know what hit them; the edge will be yours.

8. The Cloud Advantage

IT projects of this nature are well known for being time and energy vacuums, which can often amount to nothing. An extensive selection process then leads into a drawn-out implementation process; before you know it, you are 12 months away from using a new solution and further 18 months away from seeing the benefits and return on investment.

Software as a Service providers and other cloud-based solutions have opened the doors for companies of all sizes, which allows for the quick, flexible adoption of new technology and software that would have normally been too expensive, risky or time-consuming.

Taking your field service to the cloud has plenty of benefits, the most important being:

- **Zero Overhead** – With no up-front investment in licenses or hardware; cloud-based solutions can offer clear and predictable pay-as-you-go pricing.

- **Rapid Deployment** – Most SaaS offerings are already up and running in the Cloud, which means your organization can complete the implementation process in weeks and not months.

- **Flexibility** – Your organization is growing—living thing, so the technology you use should be too. The cloud offers the flexibility to effortlessly react to changing technological and business needs.

- **Customer Focus** – The cloud frees up your team from having to manage IT worries and places the focus squarely where it can have the greatest impact your business—with your customers.

- **Scalability** – Growth is a key goal for every organization. With a cloud-based mobile workforce solution, you only pay for what you use and moving from 10 users to 1,000 can be managed in the minutes without having to re-enter a lengthy procurement process and tie up IT resources.

- **Security** – Thanks to the cloud, you can leave this to the professionals. Amazon Web Services (AWS) for example, offers a secure, durable technology platform with industry-recognized certifications and audits (PCI DSS Level 1, ISO 27001, FISMA Moderate, HIPAA, and SSAE 16). AWS services and data centers have multiple layers of operational and physical security to ensure the integrity and safety of your data.

The Right Solution is Out There

ClickSoftware has realized the business need to get a solution implemented and configured within a short time frame. This can be for one of many reasons, including:

• A short-term project

• Addressing a urgent business challenge

• Testing the benefits within one team, division or branch

The Starter Kit from ClickSoftware is an out-of-the-box, cloud-based solution that addresses the mobility and scheduling needs for any size organization. Whether you have tens or hundreds of mobile resources, the Starter Kit enables companies to manage the lifecycle of a service call from initial customer contact, through work order creation, resource scheduling, dispatch, real-time updates from the field and managerial reports.

The Starter Kit contains the following components:

• Scheduling

• Mobility

• Work Order Management

• Analytics

The Starter Kit is up and running in the cloud, so the on-boarding process is rapid and streamlined. This means a limited impact on IT and zero risk for adopting. Sign up and start seeing the benefits and return on investment immediately.

For growing businesses there is always the option to move from the packaged Starter Kit solution on to a fuller and more complex solution, while still maintaining a cloud deployment. This allows for your choice in technology and software to grow alongside your business, always opening up the possibilities for continued greatness.

A Modern Solution for Modern Problems

In conclusion, whether looking at the complexities of scheduling or the gaps in mobility it is apparent that the opportunity exists to deploy a software solution to address the growing needs of your company. The costs in time and wages are too great to ignore, not to mention the impact on our customer base as a result of poor service.

No matter how hard you try there will always be that unforeseen event that causes chaos: traffic, lack of current information, a flat tire, a customer no show; the list goes forever on. Current manual methods can't support a growing business based on the level of complexity required to maintain communications and scheduling of field resources.

To avoid the old adage of 'garbage in, garbage out', these modern problems call for a modern solution. And with the mobile service force receiving an importance rating of nearly 75% with companies, you won't be alone in looking to address the gaps and improve on existing processes to ensure that your team is going where it's needed most: growing the business and ensuring success in the future.

Contact our specialists in Cloud-based Mobility and Scheduling solutions today to learn how your organization can benefit.

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Or read more at:
http://www.clicksoftware.com/solutions-saas-field-service-management.htm

i "Strategies for a mobile workforce" © IDG 2012. IDG Communications Ltd, 101 Euston Road, London NW1 2RA

ii "Moving into a consumer IT model" © IDG 2012. IDG Communications Ltd, 101 Euston Road, London NW1 2RA

iii http://mobileenterprisestrategies.blogspot.co.uk/2012/07/biggest-challenges-implementing.html

About us

ClickSoftware (NasdaqGS: CKSW) is the leading provider of automated mobile workforce management and service optimization solutions for the enterprise, both for mobile and in-house resources. As pioneers of the "service chain optimization" concept, our solutions provide organizations with end-to-end visibility and control of the entire service management chain by optimizing forecasting, planning, shift and task scheduling, mobility, and real-time management of resource and customer communication.

Available via the cloud or on-premise, our products incorporate best business practices and advanced decision-making algorithms to manage service operations more efficiently, in a scalable, integrated manner. Our solutions have become the backbone for many leading organizations worldwide by addressing the fundamental question of job fulfillment: Who does What, for Whom, With what, Where and When.

ClickSoftware is the essential choice for delivering superb business performance to service sector organizations of all sizes. The company is headquartered in the United States and Israel, with offices across Europe, and Asia Pacific. For more information, please visit www.clicksoftware.com. Follow us on Twitter.

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