WHITE PAPER

The Oneserve guide to efficiency in field service management

How to utilise technology to drive growth
Introduction: Why is efficiency important?

Efficiency hunting in field service management

Highly efficient field operations are the bedrock of competitive advantage and revenue growth. Any gap in efficiencies will hamper service delivery and damage the customer experience, often leading to detrimental financial and reputational costs.

However, achieving efficiency in a mobile workforce environment is a constant challenge. The nature of field operations means efficiency improvements can be sought via many different routes, from cutting costs to optimising processes. This complexity escalates when you add fluctuating customer demands to the mix and the ongoing challenge of responding quickly to changing requirements.

The drive to achieve efficiency has prompted many organisations to introduce mobile workforce management software. Such technology brings significant benefits and is a vital part of field efficiency, but despite the advantages, too often the technology has not been fully exploited.

This white paper explores the four essential components which must work harmoniously if you are to achieve optimal mobile workforce efficiency. It also details the role mobile workforce management software can play in coordinating these components, together with useful tips to avoid under-utilising the software.
The four essential components of mobile workforce management

The optimum goal of any field operation is to deliver high levels of service, whilst also managing costs, introducing innovative solutions and sustaining an existing portfolio of clients. Inefficiencies in any of these goals lead to underutilised teams, convoluted processes, increased overheads and a mediocre service - none of which are conducive to growing revenue and market share.

At the root of service excellence is operational effectiveness but getting an engineer with the right skills in the right place at the right time and with the right parts is no mean feat. Systems, resources and processes all need to be combined seamlessly whilst still having the flexibility to adapt to changing needs at the drop of a hat. This intricacy makes it extremely difficult to pinpoint where individual efficiencies lie and if they are not identified they can quickly disrupt service delivery. The key to fully maximising the potential of your field operation is to break down the individual elements involved. There are four components to mobile workforce operations, each equally as important as the next and all reliant on one another. Monitoring and developing each component closely will ensure fluidity and quickly reveal any inefficiency that needs to be revisited. The eradication of such inefficiencies is made far easier through the use of mobile workforce management software and the analytical capabilities it delivers.

Diagram 1: The mobile workforce management model »
Cost Optimisation

Upon first thought cost optimisation seems like the simplest of the four mobile workforce management components. In reality it is highly complex, requiring analysis of many different routes. It is a finely tuned balance of ensuring the right resources and strategies are in place but with minimal wastage or overspend. To obtain a cost efficient mobile workforce operation you need to ensure the following three interlinking strategies are fulfilled.

Three cost optimisation strategies

1. **Stock control and procurement**
   
   While unavailable stock can severely impede productivity, overordering can critically impact cashflow and subsequently damage efficiency. The key to managing stock is visibility. Through the collation of real-time information an organisation can automatically maintain an exact stock inventory, giving the time needed to reorder before stock levels have depleted. Equally, analysis of previous patterns and demands gives you the information needed to forecast future requirements. This evidence-based data can be very beneficial when negotiating with suppliers as it can be used to arrange volume discounts and base level agreements.

2. **First-time fix**
   
   First-time fix rate is a very influential metric. It holds a lot of clout in both customer satisfaction rates and efficiency levels. Achieving first-time fix is reliant on the accuracy of the original diagnosis. When initial contact is made your team need to gather a detailed understanding of the issue. That way vans can be stocked with the relevant parts and the technician with the best suited skills, location and availability can be assigned to the job.

3. **Remote resolution and preventative initiatives**
   
   The traditional mobile workforce management strategy is to either respond to a failed asset or to carry out annual services to maintain the life of an asset. Although each of these solves the problem, they are costly: for example, emergency

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*The average first-time fix rate is 80%, while top performing companies achieve 90%*

Source: Aberdeen Group
Callouts demand overtime wages, available parts cannot be guaranteed and routine service visits may not actually unearth any issues. By putting preventative initiatives in place you can minimise the number of call-outs and subsequently alleviate the pressure on your mobile workforce. Such preventative measures can come in various forms. It could be better training and information for call centre staff so they can resolve issues over the phone. Or it could involve the use of technology such as machine-to-machine (M2M) remote connectivity which will routinely monitor the performance of the asset and alert you when a potential problem occurs.

What is machine-to-machine (M2M)? M2M is the use of technology to exchange information and perform actions without the manual assistance of humans. It is often used for remote monitoring.

**Workforce Performance**

Your people are the key asset of your organisation. An engaged and motivated workforce will be capable of achievements well beyond simply boosting productivity. They will be a rich source of recommendations for improvements to current, inefficient working practices and could provide innovative new business ideas. They may also win over new customers and help to retain existing customers.

Successfully engaging and motivating your workforce is therefore vital. But improving employee engagement requires a finely tuned understanding of their actions, behaviours, attitudes and values, as well as an awareness of what they need in order to reach their full potential. By combining five factors of employee engagement your team should remain happy and feel inspired.
5 factors of employee engagement

1. **Team leadership**
   One of the greatest influences on any employee is their immediate manager. Trust and belief is essential and the best people managers give employees autonomy, empowering them through the provision of necessary information, responsibility and control. They understand their key role is one of an enabler, removing any barriers which prevent employees from doing their job.

2. **Team collaboration**
   Individuals and their levels of engagement and morale are strongly influenced by other relationships, whether that is interacting with a customer or liaising with colleagues or peers. A great deal of job satisfaction and morale can be gained from helping a customer and the informal network of support from colleagues can be a fluid and direct source of advice and local knowledge. Both of which create a sense of belonging, a very important aspect to have within your workforce.

3. **KPIs/targets**
   Good measures provide a framework within which to operate so that everyone is clear on the part they need to play. Measures are also important for understanding business performance.

Goals positively affect performance because they direct attention and efforts, have an energising function and encourage persistence! But remember to provide feedback on progress so your team know what still needs to be achieved.

4. **Continuous improvement**
   One way to engage your workforce is to give them a significant investment in improvement programmes. By inviting suggestions from the people that have an in-depth knowledge of the system and processes it will help to gain buy-in to the new solution as well as unearthing informative solutions. But it is essential that there are no limits to the ideas put forward because restrictions will dampen enthusiasm.

5. **Training and support**
   The nature of their jobs means field staff often feel as though they are out on a limb but the aspiration to be part of a bigger picture is a key driver behind motivation. Therefore support from managers and other colleagues and departments is vital. Likewise, regular training will give field staff confidence in the work they carry out, boosting both productivity and customer satisfaction.
Customer Satisfaction

Customers are without question expecting more from their service providers. Gone are the days when they were happy to sit in and wait for a visit at some point during the day. Choice is greater and information is a click away. This immediacy engenders impatience and as such, meeting customer expectations is becoming more and more of a challenge.

Customers want a slick operation and expect a technician to arrive on time and to work productively. You must build and maintain precise daily work schedules, provide engineers with all the information they need and work to achieve a high first-time fix rate.

Don’t forget existing customers

It can be easy to focus on wooing new customers but statistics show that it is 6-7 times more costly to attract a new customer than it is to retain an existing customer (Source: Bain & Company). Therefore, the goal of any customer interaction should always be to generate loyalty. What makes your customers loyal and how can you continually meet their expectations? One way could be to look at the data you have within your CRM system to analyse the different touch points employees have with your customers. You can use this information to consider how the customer experience can be improved at each of these touch points.

A 10% increase in customer retention levels result in a 30% increase in the value of the company.

Source: Bain and Company
Workflow Rationalisation

Workflows are what keep a mobile workforce organisation ticking over. They enable field staff to carry out their daily routine and meet the expectations of customers. But they are also notoriously difficult to perfect. Every process in the mobile workforce lifecycle must be streamlined. Without a joined up approach silos can form, swiftly leading to disruptions that can eat into profit margins. What’s more, disconnected processes will severely hamper organisational growth.

The biggest cause of inefficient workflows is the improper flow of information. Information feeds everything, from stock availability, to navigating the best route to each job, to the right time to invoice a customer. But so often data is not fully exploited, resulting in ambiguity and frustration which subsequently leads to falling service levels.

38% of organisations indicate that they can save 30 or more minutes per day per technician with a basic change in process. For these organisations, this can lead to average annual cost savings of £525,000.
The first step to rationalising your workflows is to ensure all relevant data is collected. This includes everything from the time it took to complete a job to customer feedback. Every piece of information holds value; it’s just your job to protract that value!

Every mobile workforce organisation has processes in place to record data, whether that is a CRM system or a spreadsheet. But these forms of data extraction often only touch the surface, with large quantities of data lying dormant due to insufficient time or resource to fully analyse the information. This lack of analysis means decision-making and forecasting must involve a quantity of gut instinct, which is a somewhat risky strategy to take in a competitive marketplace.

The answer is automation. With automated reports and dashboards you will be able to monitor performance and identify trends. The automation should deliver this information in real-time enabling you to react quickly to any changing demands.

The next step is to ensure there are workflows in place which eliminate any duplication or disjointed communication. Once information is gathered, all relevant parties need to have access to it. For example, the full job history of a customer may be filed at head office but unless the engineer has access to this they may be forced to duplicate data previously collected and are likely to take longer to complete the work. In a similar vein, analysed data must be shared with all relevant decision makers.

The automated analysis of data will present key findings in an easily digestible format. It is now down to you to use this information to make smarter decisions based on concrete evidence. This information should also provide inspiration for innovative ideas and continual improvement.
The role technology plays in mobile workforce management

Understanding and honing each component of mobile workforce management is an excellent start but the amount of information you need to process, and the speed in which you need to respond to changing demands, makes it extremely difficult to manage without the use of technology.

Mobile workforce management software provides the automation we discussed in the previous section but also provides transparency and adaptability. The software processes large amounts of information and variables to optimise resource deployment, forecast demand, schedule resources and monitor performance.

Because it naturally integrates with each component it delivers real-time analytics of the entire mobile operation. This overarching visibility bestows a highly responsive operation with all the data needed to make informative decisions and drive efficiency, service excellence and revenue growth.

If you assign the software adoption lifecycle (shown in diagram 3) against mobile workforce management software it further highlights the need for organisations to exploit such technology. Mobile workforce management software has been readily available for a number of years and is now used by a large proportion of mobile workforce organisations. When software is adopted by a majority it quickly becomes the new normal. Customers may not know the software is in place but they expect the service the software is able to deliver. Likewise, with such widespread adoption, employees make assumptions that they will have access to mobile workforce management software to help them complete their work.

Fully utilising mobile workforce management software

It is evident that mobile workforce management software brings benefits which simply cannot be matched with manual processes. And yet, sometime down the line, the underutilisation of the software is a common realisation for many. The expectation put on the technology is rightly high but a lack of forethought makes it very difficult for the software to live up to expectations. There appear to be three common errors which hinder performance and these occur throughout the lifecycle of the software.

1. Purchasing software: the bigger picture

As technology has become ever more accessible and affordable, organisations perceive it to be a commoditised utility that can be readily bought off the shelf. Although this can be an effective approach for systems which need to perform a standard function such as accounting, it can be a dangerous approach for software which needs to perform a more complex role. Commoditisation brings the expectation that the software will deliver similar returns irrespective of the influential factors specific to an organisation. This blinkered approach of waiting for the software to perform provides limited results and often leads to the loss of time, money, effort and opportunities.

To avoid this, instead of thinking of the software as a commodity, view it as a core structure which is carefully woven into the working practices of your organisation. This mind-set will help deliver a distinctive competitive service whilst also ensuring all the human and organisational influential factors specific to your company are effectively managed during the implementation.

The second piece of advice when purchasing mobile workforce
Utilising software: a journey not a destination

There is no doubt that mobile workforce management software has the potential to play a positive role in transforming the performance of business operations and enhancing the delivery of services. But the impact technology can have can be put in jeopardy if focus isn’t maintained.

Following implementation it is commonplace to leave the software to work in the background but significant competitive advantage can be attained after the solution has been embedded in the organisation. If benefits are to be fully realised they need to be actively managed over the system’s entire operational life.

This longer-term exploitation strategy encourages everyone in the organisation to innovate and improvise with their working environments, and to tailor the system and processes to reflect the changing circumstances and requirements of your company. In other words, try to always view the software as a platform for innovation which will continually enrich your organisation, rather than a journey’s end.
Conclusion

Organisations that use analytical insights to change the way they operate, or to improve their products and services, are:

- Twice as likely to be in the top quartile of financial performance within their industries
- Three times more likely to execute decisions as intended
- Five times more likely to make decisions faster

Source: Bain and Company

Service is a key differentiator in a competitive marketplace. It is also central to retaining customers and growing revenue and market share. Inefficiencies severely hamper efforts to achieve this service excellence and few would argue against the positive impact fully utilised service management software has on reducing these inefficiencies.

The analytics mobile workforce technology delivers enables you to analyse the past, monitor the present and predict the future, giving you a complete picture of operational efficiency. It will focus your attentions on the useful data; the data which will enable you to set KPIs, benchmark performance, identify trends and make proactive evidence-based decisions. The insights you gain will be used to take action across your entire field operations; from your people to your processes and systems. It is this all-encompassing ‘we know’ rather than ‘we think’ view which will give you the power to continually improve your service, drive down costs and achieve optimal growth.

But, in the same breath, technology cannot work alone. For your organisation to reach its true potential you must combine the four elements of mobile workforce management and use technology as a catalyst for inciting organisational changes. The single most important takeaway from this white paper is that software is an enabler, not an answer. With this attitude towards mobile workforce improvement you will be fully equipped to achieve the service excellence and market share your organisation craves.
Diagram 4: Example of a mobile workforce analytics dashboard

### Future
- **Resource planning**
  - Predicted workload analysis
  - Workforce capacity and capability
- **Workforce capacity and capability**
  - Employee availability and retention
  - Stock levels and replenishment

### Present
- **Customer service**
  - First time fix rates
  - SLA compliance
  - Customer satisfaction level
- **Workforce productivity**
  - Utilisation rate
  - Jobs completed per day
  - MTTR (Mean Time To Repair)

### Past
- **Cost analysis**
  - Service revenue per engineer
  - Total service cost
  - Total service revenue
  - Operating profit per engineer
- **Top performing engineers**
  - Workforce safety analytics
  - Engineer engagement

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**Proven, real and achievable benefits of field service management software**

Below are some of the improvements Oneserve customers have achieved by using our mobile workforce management software:

- ✔ **Fuel savings of £18k per year**
- ✔ **25% reduction in staff driving times**
- ✔ **25% increase in productivity**
- ✔ **Increased turnover of over £70k in the first year – per engineer**
- ✔ **Increase of jobs per engineer up from 5 per day to 7**
- ✔ **A new level of management information and visibility across the whole business**
- ✔ **Detailed analytics: reporting is quicker, more accurate and more granular**
About Oneserve

At Oneserve we are proud to offer an exciting, cost effective mobile workforce management solution.

With Oneserve you can transform the performance of your organisation. Our technology is simple to configure, intuitive to use and designed around you, helping you to optimise workflows and boost workforce productivity. The solution enables the user to schedule workers and jobs, manage stock and fully integrates with existing financial systems like Sage.

We specialise in the social housing sector and our clients enjoy the following benefits of Oneserve:

- Workforce productivity and utilisation gains
- Increase in bottom line by driving a right first time culture
- New ways to transform the customer experience

For more information or to request a free demo with a member of our team call us on 01392 367367 or visit our website www.oneserve.co.uk

FREE DEMO >>

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