

OPTIMIZE WORKFORCE SCHEDULING

INCREASE PRODUCTIVITY AND REDUCE COSTS

After-sales service is a primary profit source and growth engine for many companies. The SAP® Workforce Scheduling and Optimization application by ClickSoftware helps you improve field service forecasting, planning, rostering, scheduling, and communications to increase efficiency and boost profitability.



Workforce scheduling can be one of the toughest challenges. How can you be sure that the right people – as well as parts, equipment, and vehicles – are available for the right job, at the right time, and at the right cost? The SAP® Workforce Scheduling and Optimization application by ClickSoftware addresses this challenge. As a comprehensive optimization solution, the software supports key facets of your field service operation – including forecasting, planning, scheduling, mobility, and analysis.

Companies that fail to provide high-quality after-sales service do so at their own peril. Efficient field service operation is not only a primary driver of customer satisfaction and loyalty, but it can also generate highly attractive profit margins. Yet despite the potential benefits, many companies struggle to master the diverse activities and processes that support an outstanding service operation.

Supporting End-to-End Field Service Processes

SAP Workforce Scheduling and Optimization provides all the decision support, visibility, and control your service organization needs to optimize its field service operation. Powerful yet flexible forecasting tools help you create customer-demand forecasts for yearly, monthly, weekly, and even daily intervals. These forecasts serve as input into long-term and short-term resource capacity planning – which includes management of vacation requests, training, and contractors. The mobile application enables members of your field force to have the critical information they need at their

fingertips, increasing their efficiency and productivity. Utilizing data from the mobile solution, the optimized scheduling solution or dispatchers can make better scheduling decisions based on the most current and real-time information. The application also provides analytical and reporting tools so you can measure a wide range of key performance indicators covering service quality, resource utilization, and overall productivity.

Your field service team can use the application to manage jobs of any duration – from unplanned work, such as emergencies and “break-fix” calls, to routine operations such as preventive maintenance, meter reading, periodic inspection, and infrastructure maintenance. As your service operation becomes more productive, your team can complete more jobs per day. Increased efficiency also helps you reduce costs associated with labor, travel, overtime, and administrative support.

Better Decisions Across Your Service Organization

With support for intelligent decision making across all levels of your service organization, SAP Workforce Scheduling and Optimization helps eliminate guesswork and inefficiency by providing answers to fundamental questions like these:

- **Demand forecasting** – How much work is likely to arrive? When? Where? Which type? Forecasting tools help you create a demand forecast for the next year, month, and week.
- **Capacity planning** – What is the ideal size and skill mix for service teams in each location and time frame? Planning

functionality allows you to balance the demand forecast with the available workforce – as well as the parts, equipment, and vehicles needed for the job. You can make workforce-related decisions about recruiting, training, relocation, overtime, and use of subcontractors.

- **Tactical resource planning** – When work arrives, who will be available to do it? How much of the workforce will be on vacation, in training, or assigned elsewhere? Planning tools help you take an abstract service plan and turn it into an actionable blueprint.
- **Rostering** – What is the ideal allocation of resources to best meet the anticipated workload? Plan shifts to meet demand-forecast needs while factoring in engineer preferences, skills, and costs. Rostering functionality helps your planners decide who should work on what days and how vacations and days off can be accommodated without impacting service quality.
- **Scheduling** – How do we optimally allocate resources, factoring in the characteristics of each resource, current commitments, travel constraints, and each customer's individual needs? How should we adjust the schedule when circumstances change? Scheduling functionality helps you decide who does what job, where, and for whom.
- **Execution** – During service delivery, how should we respond, in real time, to dynamic events such as travel delays, job cancellations, and emergency calls? Optimization functionality helps you manage work orders, update your

service plan in response to feedback from the field, monitor on-the-job progress, and track the actual location of field engineers.

- **Analysis** – How well is our service operation performing? Where are the bottlenecks? What can we do to improve? Monitoring, reporting, and evaluation tools provide both in-depth and executive-level assessments, helping you identify problems while also suggesting ways to resolve them.

Real-Time Workforce Scheduling

The combination of the scheduling application with the mobile application provides a set of real-time monitoring tools, which increases your organization's ability to make informed decisions in real time. With tools for proactively managing forecasting, planning, and day-of-service execution, you can respond to the inevitable travel delays, emergency calls, and missed supplier deliveries with minimal disruption. On a macro level, the software helps you manage events with long-term impact, such as escalating energy costs, new technology, changes in business goals, and shifts in customer demand. On a more granular level, the application helps you manage immediate operation concerns such as promising a customer a specific delivery date or appointment time.

As a flexible, adaptive application, SAP Workforce Scheduling and Optimization allows your service team to make informed decisions based on all current customer orders, the availability of special parts and tools, and workforce

Powerful yet flexible forecasting tools help you create customer-demand forecasts for yearly, monthly, weekly, and even daily intervals.

capacity. Because the scheduled time of a service call is based on the actual availability of resources and real-world travel constraints, you enjoy a greater degree of confidence about meeting customer expectations. If service jobs run longer or shorter than anticipated, the software automatically considers real-time impacts and optimizes the current work plan based on service-level agreements, job priority, costs, and level of urgency. Updated at predefined intervals – or in response to new information and events – the software helps you maximize throughput while controlling costs.

Service Plan Automation

Workforce scheduling is never a static activity. Emergencies arise, routine calls turn into major headaches, and customers ask for last-minute schedule changes. Dealing with contingencies such as these on an ad hoc or manual basis reduces efficiency and increases costs. SAP Workforce Scheduling and Optimization offers advanced scheduling functionality that allows you to insert new

tasks or update your service schedule as issues arise. If a high-priority job needs to be accommodated, it can be inserted into your schedule – automatically bumping out any low-priority jobs without the need for further intervention. The application also updates your schedule automatically when a job is cancelled or is taking longer than expected. Continuously adjusting your service schedule in real time, the application helps reduce administrative activities while increasing the productivity of your service operation.

Putting the Software to Work

In addition to robust functionality, SAP Workforce Scheduling and Optimization offers technology and tools that help your company deploy, use, and expand the solution. You benefit from:

- **Domain expertise** – Built on best-practice expertise and years of experience gained through customer implementations, the application is fine-tuned to meet the needs of organizations in service-intensive industries such as high tech, telecom and cable, utilities, healthcare, automotive, and government.
- **Flexibility** – The application includes menu-driven administration tools that allow you to configure the software to meet your specific requirements with little or no need to write custom code. The software supports multiple configurations within a single installation, which allows your regional divisions or business units to use different settings without implementing multiple instances.

- **Scalability** – Highly scalable technology supports companies with a wide range of field-force sizes. Dynamic load balancing permits the creation of a single virtual server from multiple physical servers.
- **Usability** – Based on development expertise and user feedback over many years, the software features practical and intuitive screens, menus, and tools that help your service personnel stay motivated and productive.
- **Integration** – As a solution extension, SAP Workforce Scheduling and Optimization has been tested and validated by SAP for integration with your existing SAP software.

The Benefits of Optimization

SAP Workforce Scheduling and Optimization helps your company identify and eliminate the inefficiencies that often affect field service forecasting, planning, scheduling, mobility, and analysis. By enabling you to increase customer satisfaction while reducing costs, the application helps your company create a powerful competitive advantage. The application also helps you:

In addition to field service, the software also supports internal plant maintenance teams by optimizing regular and unplanned service activities with available technicians.

- Improve resource utilization by reducing travel, overtime, and downtime
- Increase resource effectiveness with improved first-time fix rates
- Respond more efficiently to disruptions and problems by leveraging automated optimization functionality
- Boost efficiency by balancing – and rebalancing – demand forecasts with the available workforce

Find Out More

To learn more about SAP Workforce Scheduling and Optimization, call your SAP representative. For more information about solution extensions, visit us on the Web at www.sap.com/solutions.

Solution Extensions Complement SAP® Software

The SAP® Workforce Scheduling and Optimization application by ClickSoftware is a solution extension that integrates with SAP software and complements SAP solution functionality. As with all solution extensions,

SAP tests, validates, and supports the application so that you can rely on a high level of quality and commitment. As a leading global provider of mobile workforce management and service optimization solutions, ClickSoftware has been serving customers in a broad cross-section of industries for more than 15 years.

Summary

The SAP® Workforce Scheduling and Optimization application by ClickSoftware helps service operations achieve higher levels of productivity, customer satisfaction, and cost-effectiveness. With functionality that supports proactive demand forecasting and capacity planning, plus real-time scheduling that encompasses field mobility and location-based services, the application enables better decision making across all levels of the organization.

Business Challenges

- Improve field-force assignments so that service teams have the right number of people with the right mix of skills in the right location at the right time
- Lower costs by reducing excessive travel, overtime, and administrative overhead
- Increase customer satisfaction by meeting or exceeding service-level commitments and offering shorter appointment-time windows
- Boost efficiency by reducing the amount of time field technicians spend on clerical duties

Key Features

- **Forecasting** – Determine how much work will arrive, when and where it needs to be done, and which business unit should handle it
- **Planning** – Decide on the right size and skill mix of the workforce for a given location and time frame
- **Execution** – Create an optimized schedule that governs who does what job, with what resources, when, where, and for whom
- **Analysis** – Create actionable business intelligence across all levels of the service organization, with outputs customized for executives, managers, planners, and dispatchers

Business Benefits

- **Increase customer satisfaction** with high first-time fix rates and short response times
- **Lower costs** by reducing travel, overtime, and downtime
- **Boost operational efficiency** by optimizing resource utilization and streamlining end-to-end service processes
- **Create a competitive advantage** by meeting service-level commitments and responding quickly to both routine and unforeseen service requests

For More Information

To learn more about SAP Workforce Scheduling and Optimization, call your SAP representative. For more information about solution extensions, visit us on the Web at www.sap.com/solutions/solutionextensions.

50 092 396 (09/06) Printed in USA.

©2009 by SAP AG.

All rights reserved. SAP, R/3, SAP NetWeaver, Duet, PartnerEdge, ByDesign, SAP Business ByDesign, and other SAP products and services mentioned herein as well as their respective logos are trademarks or registered trademarks of SAP AG in Germany and other countries.

Business Objects and the Business Objects logo, BusinessObjects, Crystal Reports, Crystal Decisions, Web Intelligence, Xcelsius, and other Business Objects products and services mentioned herein as well as their respective logos are trademarks or registered trademarks of Business Objects S.A. in the United States and in other countries. Business Objects is an SAP company.

All other product and service names mentioned are the trademarks of their respective companies. Data contained in this document serves informational purposes only. National product specifications may vary.

These materials are subject to change without notice. These materials are provided by SAP AG and its affiliated companies ("SAP Group") for informational purposes only, without representation or warranty of any kind, and SAP Group shall not be liable for errors or omissions with respect to the materials. The only warranties for SAP Group products and services are those that are set forth in the express warranty statements accompanying such products and services, if any. Nothing herein should be construed as constituting an additional warranty.