

# Moving Beyond the Basics with Field Service Mobility

A ClickSoftware Business Paper

## Summary

There are many outputs of a mobility solution integrated with a Workforce Management optimization scheduling solution. Most service organizations are focused on visibility, or understanding where their field resources are located at any given point during the day. And with today's mobile devices providing GPS coordinates, it is easy to see where your field workers are on an integrated map, allowing you to give a much needed ETA. But this is only a small portion of the functionality and benefits associated with a mobility solution. This paper will explore the deeper value that can be obtained from a mobile workforce management solution.

## The Real Value of Updates from the Field

When scheduling field technicians, a good workforce management tool will take into consideration the planned duration time of the scheduled task. This will help make the schedule as accurate as possible at the beginning of the day. But as the day progresses, changes occur that make the planned schedule change. This is when mobility makes a difference.

The Planned Duration is the expected time it takes to complete a job. In most cases, the planned duration will differ from the Actual Duration. If a difference occurs, the mobility solution should enable field resources to update the planned duration while on site. This update may occur at the start, middle, or end of the job.

Let's use the example of changing a light bulb and we will set our planned duration for 60 minutes. Here are two scenarios where the planned duration may be updated at different times during the duration of the job.



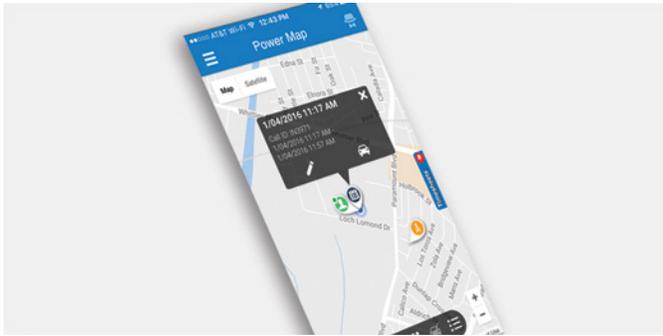
- The technician arrives on site and notices that the lamp is not plugged in, which is a simple fix. At the start of the job, he shortens the planned duration to 5 minutes, plugs in the lamp, and closes out the job. As for the remainder of his day, jobs are pushed forward allowing room at the end of the day. The dispatcher can also check for nearby work in the schedule and fill the idle time using smart scheduling tools that use the defined scheduling logic (service policy) to identify the optimal job.
- The technician arrives on site and checks that the lamp is plugged in, replaces the light bulb, checks the circuit breaker, replaces most of the lamp components and realizes that he is about to exceed the planned duration. On his mobile phone, he extends the job by 15 minutes so that he can clean up and provision a new follow up job to replace the wiring in the wall. This update occurred at the end of the job. Again, the remaining jobs for the day are optimized as in the previous scenario.

The value of the adjustment of planned durations comes from the ability of your workforce management solution to re-optimize work based on the updated durations from the field. In short, the updated durations from the field allow the optimizer to have a true sense of the in-day schedule and make scheduling adjustments based on the defined service policy. The impact is even more powerful with companies that drip feed work to their field resources.

## Ensuring Updates From the Field

One of the biggest challenges within mobility is ensuring the field resources update their status throughout the day. Then we will be able to ensure that the schedule is optimized to its fullest. This can be done with predictive and proactive text messages that drive status updates. These are predefined, time-based, or context aware messages that are delivered to the mobile device, prompting action.

- "May I change your status to en route?"
- "Your status has changed to en route. May I pull up directions to the customer site?"
- "You have arrived on site. May I change your status to on site?"
- "This job is scheduled to end in 5 minutes. Would you like to extend the duration by 15 minutes?"



In all of these circumstances, the field resource simply clicks on “yes or no” and the mobile software does the rest.

The value is delivered at multiple levels.

- The field technicians no longer call in to the dispatch center to update status. This keeps the technicians focused on their job in the field and reduces the burden on the dispatch center.
- And from the first part of this paper, we achieve our result of real-time status changes which yield accurate duration reporting which increases in-day optimization.

All of this drives the schedule to focus on business goals.

## History Shapes the Future

Considering the importance of planned durations, wouldn't it make sense to look at the historical planned duration reporting? If this could be done by field resource, by work type, by customer, by skill type, by geographic region / district as well as many other properties, then these figures could help fine-tune the planned durations.

For example, if our planned duration for lightbulb repair is set to 60 minutes for all field resources and they consistently take 30 minutes to complete the job, we can shorten the planned durations for all technicians to 30 minutes for this work type.

As a result, 30 more minutes of scheduling space is now available within the schedule...for each technician! This extra room permits more work to be scheduled, resulting in higher levels of optimization (more jobs and more resources = improved optimization). On the flip side, if lightbulb repair consistently takes 90 minutes instead of 60 minutes, an adjustment can be made to accommodate the extra time and eliminate the in-day adjustments to the schedule, which translate into late arrivals or even missed appointments.

## Efficiency Ratings Derived From the Field

In addition to planned duration adjustment, the Actual Duration Reporting can be used to designate an efficiency rating to the field resource.

- For a new technician, we assign an efficiency rating of 2. The 60 minute planned duration is doubled and new planned duration is 120 minutes (60 x 2).
- For an experienced technician, we assign an efficiency rating of .5. The 60 minute planned duration is cut in half to 30 minutes (60 x .5).



Efficiency ratings should be derived from accurate actual duration results. The only way to obtain these results is through accurate status updates from the field.

## Right Back at the Customer

Finally, we consider the administrative work associated with the lack of visibility in the field. Often, call centers are burdened with technician status inquiries from the customers. This scenario induces telephony costs, poor customer service, and reduced employee happiness as staff has to deal with unhappy customers. If you could give customers real time technician monitoring on a map, notification of when the technician's truck has arrived, and the ability to reach out to the technician directly when the field resource begins travelling towards the job site, wouldn't that cut down on all those administrative costs? This refers to the person or group directly impacted.

## Gaining True Value

To sum up, a mobility solution solves the visibility problem. But in order to obtain the most value from your workforce optimization software, additional functionality is required. Driving status changes with context-aware notifications, adjusting planned durations based on historical reporting and applying efficiency ratings will improve optimized results, driving down costs while improving revenue generation, customer service, and employee happiness.

# About ClickSoftware

ClickSoftware is a global leader of automated workforce management and optimization solutions for the service enterprise.

Available via the cloud or on-premises, our solutions provide organizations with end-to-end visibility and control over the entire service process, while providing them with tools to drive their business forward by optimizing forecasting, planning, scheduling, mobile workforce management and customer communication.

ClickSoftware solutions boost productivity and increase customer satisfaction, while decreasing overall service costs. ClickSoftware is the number one choice to deliver control over the entire service process, while providing superb business performance to organizations of all sizes, in all service sectors.

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