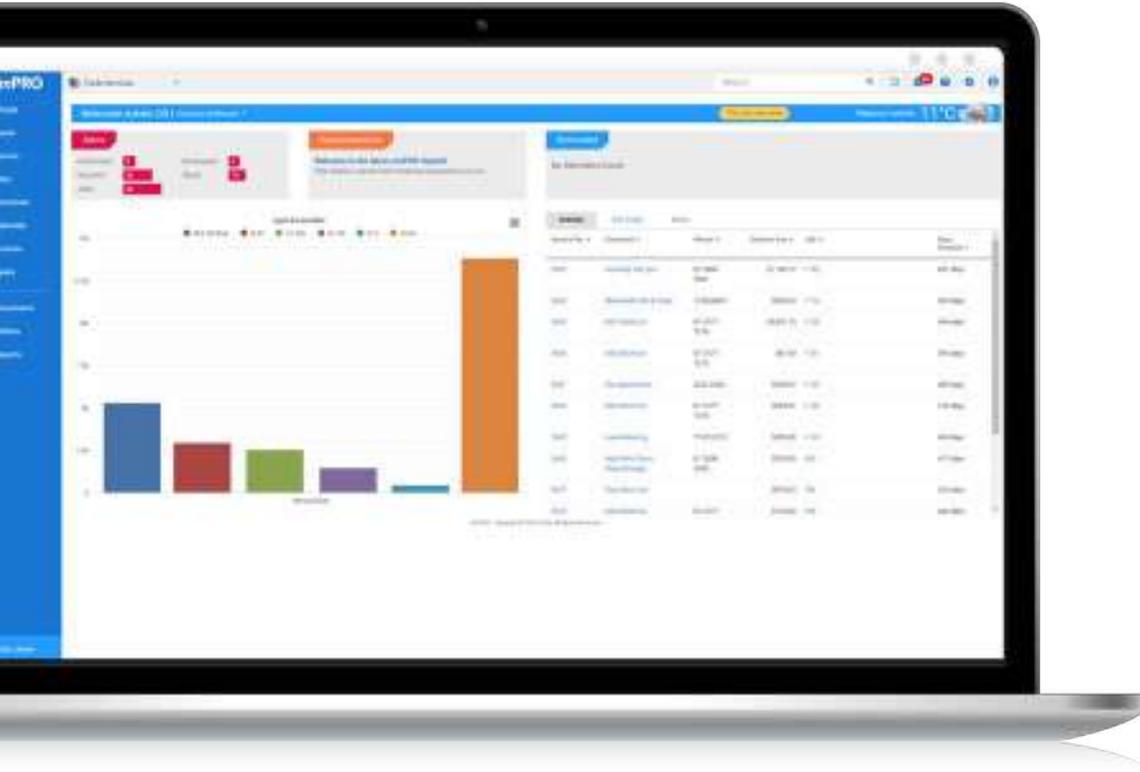# UNLOCKING THE
SECRETS
OF EFFICIENT JOB MANAGEMENT

Streamlining workflows with job management software | **simPRO**

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What is job management software?

Achieving success with streamlined processes

Job management software simplifies and streamlines the processes involved in service, maintenance and project workflows. For businesses in the field service industry, an efficient job management process is the foundation that leads to ongoing success and growth potential.

At its core, good job management is about the processes and workflows that your business undergoes to provide exceptional service to your customers. From the initial request for work, to sending your team out on the job and finally to invoicing and payment, a job management software can act as a single source of truth for your business, helping you improve efficiency and by extension, profitability in all areas.

Many business owners know that once processes are in place it is easy for the optimising of job management to fall by the wayside. Prioritising updating these processes can minimise risk to your business and potential frustration felt by staff. From

initial customer contact to final invoicing and payment, a streamlined job management process could help you increase billable hours, minimise double data handling and ensure your staff are as efficient as they can be.

No matter if your business is transitioning from paper-based systems or other software solutions, implementing the right job management software for your business will have a variety of benefits.

Cloud-based job management software in particular, provides a centralised hub for all your business data. This in turn, can improve visibility, increase profitability and enhance performance by creating a streamlined system to help you efficiently complete day-to-day workflows.

"I can pull up a job in simPRO, see all of the purchase orders open for that job, see the status of those orders, and see where the costs might be varying. We can identify issues that might be coming up, and we can address them earlier on before they become bigger problems."

–Tim Orr, Blue Wave Communications

How to know if job management software is something you need

As the backbone to any field service business, outdated or clunky systems can hinder your ability to take the next steps in growing your business. Efficient job management will provide opportunities for growth and allow you to take your company to the next level. But how do you know if it's time to make the transition from either paper-based workflows or another software solution?

One simple way is by identifying the current pain points in your business.

It's difficult to know when it is the right time to implement a new system in your business. However, in general, if you are looking for growth opportunities, seeking timely and accurate information or simply want to streamline processes, it may be time to consider your options.

A single cloud-based software system stores all the information you need in one place, reducing the risk of double handling, minimising lost job cards and helping your team become proactive instead of reactive

TAKE OUR 60 SECOND SURVEY BELOW

If you answer 'yes' to two or more questions, it is time to make the leap to a more efficient job management solution.

BUSINESSES USING PAPER-BASED WORKFLOWS

YES | NO   Does it take more than 24 hours for job cards to be received by the office?

YES | NO   Is there ongoing miscommunication between staff leading to loss of sales?

YES | NO   Is manual data entry taking up a large amount of your time?

YES | NO   Are there frequent errors in your data entry or results?

YES | NO   Is it difficult to reschedule a job or field staff member?

YES | NO   Does it take more than 30 days for customers to pay their invoices?

YES | NO   Are you struggling to keep track of your inventory?

BUSINESSES USING SOFTWARE SOLUTIONS

YES | NO   Are different teams within your business working with different software solutions?

YES | NO   Are you running with multiple systems which don't integrate seamlessly?

YES | NO   Are you spending too much time trying to make your current system fit your workflows?

YES | NO   Are you missing your profitability or growth targets?

YES | NO   Does it take more than 30 days for customers to pay their invoices?

YES | NO   Are you struggling to keep track of your inventory?

Key job management software features

In the field service industry, every business has its own unique workflows and processes. That's why it's important to do your research when choosing job management software *- it isn't one-size-fits-all.*

Three tips for researching the software that will fit your business

1. **Look for software which will complement your workflows.** Keep in mind that not all software will offer every feature you need. To determine if software will complement your workflows, identify key processes in your business and find software which offers features to streamline these processes.

2. **Identify if the software provides an end-to-end solution that can help you manage everything from customer data, to quoting and scheduling to invoicing and reporting.** This will ensure that as your business grows, you won't have to change your processes or software on an ongoing basis. It will also help streamline individual job workflows and provide visibility to manage multiple jobs at once.

3. **Talk to other businesses like yours that are using job management software.** This will give you a unique perspective on the real-world capabilities on how the software can work for your business.

Remember: The right job management solution for you will enhance, not hinder, your processes.

Features you may need in a software solution

In-office features and capabilities:

- Stores customer information in a central hub accessible from anywhere at any time

- Automates data entry

- Enhances the visibility of staff in the field for streamlined scheduling and dispatching

- Tools to quote, invoice and receive payments

- Connects the office to the field with two-way sync

- Reporting functionality

In-field features and capabilities:

- Update job details, site history and customer details on the go with two-way sync between office and field

- Functionality to capture customer or project manager sign-off on jobs while in the field

- Tools to quote, invoice and receive payment on site

- Access job notes, site history, photos, maps and other documents in the field

- Track time spent on-site and travelling to jobs
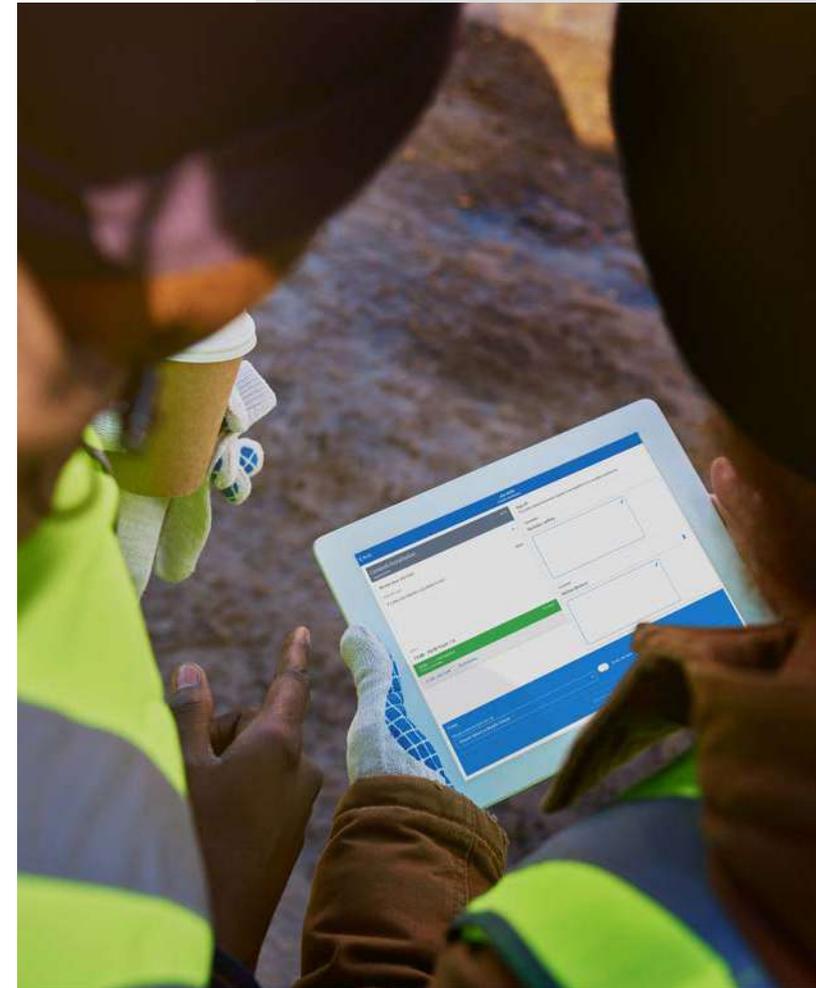
"We tried two or three different platforms, and these other platforms were not cloud-based which caused a big headache. We really needed to concentrate on growing the business rather than worrying about IT issues. So, finding a cloud-based solution like simPRO worked really well for us and still does."

–Ben Edwards, BGE Digital Security

Matching your processes with the right software

Mapping your workflows

Once you have a general idea of features you want in your software, break your list down further and be more specific. You can do this by mapping your service job workflow. Using post-it notes, map your workflow out step-by-step. This will help highlight the key processes which may be unique to your business and others that can be streamlined.

We have mapped out an example of an optimised job workflow using cloud-based job management software.

Workflow	How the workflow is optimised
Initial customer contact Job is raised Job is scheduled and field staff dispatched	Once the customer has called in a job, and the job has been raised, the scheduler uses fleet tracking to find the nearest field staff member and dispatches them to the job. The field staff member receives an alert on their phone, and the customer's details and job information are made available in the field through an app. The free flowing communication ensures field staff do not have to return to the office before dispatch.
Field staff member arrives at job Field staff member asses job, provides an estimate and quote	Through the two-way sync between office and the field app, the scheduler is alerted when the field staff member arrives on-site and clocks on. The estimate and quote are available in real-time to staff in the office.
The work is completed Field staff member provides an invoice on-site Field staff member collects payment on-site	Using the field app and payment integrations, staff can invoice in the field and receive payment before leaving the site.
All financials are tracked and flow through to the chosen accounting software	The customer invoice is sent directly from job management software to accounting software.

Key considerations when choosing job management software

Now that you have a clear understanding about the key function of job management software, as well as the workflows and processes you would like to streamline, you can start comparing software solutions. By using a process of elimination, you can now find the right fit for your business.

1. **Does the software you are looking into provide a solution to previously identified pain points?**
   Identify if the software helps you streamline processes in your workflow map. If the software doesn't fit your processes, can it, or your processes be adapted to support each other?

2. **Are you able to get a demo of the software?**
   You can't know for certain if a software will support your business until you see it in action. Different software companies will have different demos available. At this stage, it's important you gain as much information about the software from the demo as possible.

3. **Will you be supported with a thorough implementation and training process? And is ongoing support available if you need it?**

   Implementing new processes and software into any business is a delicate situation. Be sure to investigate the implementation processes of your chosen software. Make sure the software company is committed to ensuring your business has a successful change management process. This will include open communication, a choice of on-site or online training and ongoing consultation.

   And, lastly, are there a range of resources and support available to your team to ensure the ongoing success of the software in your business? Software develops quickly and making sure there is support available to update your team on the changes is essential to its success in your business.

Common forms of software demos:

- **Video demo:** A video demo is a great place to start your search. While videos won't show exactly how the software will fit in your business, it can give you a quick overview of key features.

- **Free trial:** Many software companies offer free trials. This 'try before you buy' sales process means you will have to commit time to implementing the software into your business, only to have to remove it after a period of time. While this is a great option for some, there is a possibility that you may miss key information about how the software can help your business.

- **Customised demo:** The best of both worlds. This type of demo is run by an expert that can show you exactly how the solution could work in your business and address your key pain points. During this process you will have an expert on hand who can answer your questions and concerns as well as clarify ideas. This is extremely important if the software is complex and can be adapted to suit unique business workflows. A customised demo provides the most clarity and certainty.

How to unlock efficiencies in your business with job management software

Choosing and implementing the right job management software for your business will have positive results for every moving part of your business. Let's take a look at how job management can help you optimise everything from team management to customer service and business operations.

1. Streamlined team management

Visibility of your workflows in both the field and office is essential to a streamlined job management process. With centralised data in a cloud-based software, there is no need to constantly interrupt your field staff on the job for updates, or wait for them to return to the office to send invoices. Cloud-based job management software enables real-time awareness of job progress and location of field staff, in turn, enhancing job scheduling capabilities. You can make scheduling changes as they happen, closing any gaps and keeping your team productive during the day.

2. Improved productivity

While improved productivity in the office is a natural benefit to streamlined processes, for field service businesses, access to job management resources in the field takes that productivity to the next level. Cloud-based job management software with a mobile app enables field staff to access job information, site history and even request inventory all without returning to the office. Furthermore, field staff can quickly access all asset test history to gain vital background information about what could be causing equipment faults.

By giving your team the information they need, when they need it, you will reduce travel time, increase productivity and expand capacity to look into new revenue streams or take on new jobs.

3. Clear and effective communication

Maintaining effective communication is a key component within any industry, however, for a remote workforce it is crucial to each job. For field service businesses, communication between office and field should not end once a job has been dispatched. Rather, it should be ongoing and instant, enabling efficient processes and a seamless experience for the customer.
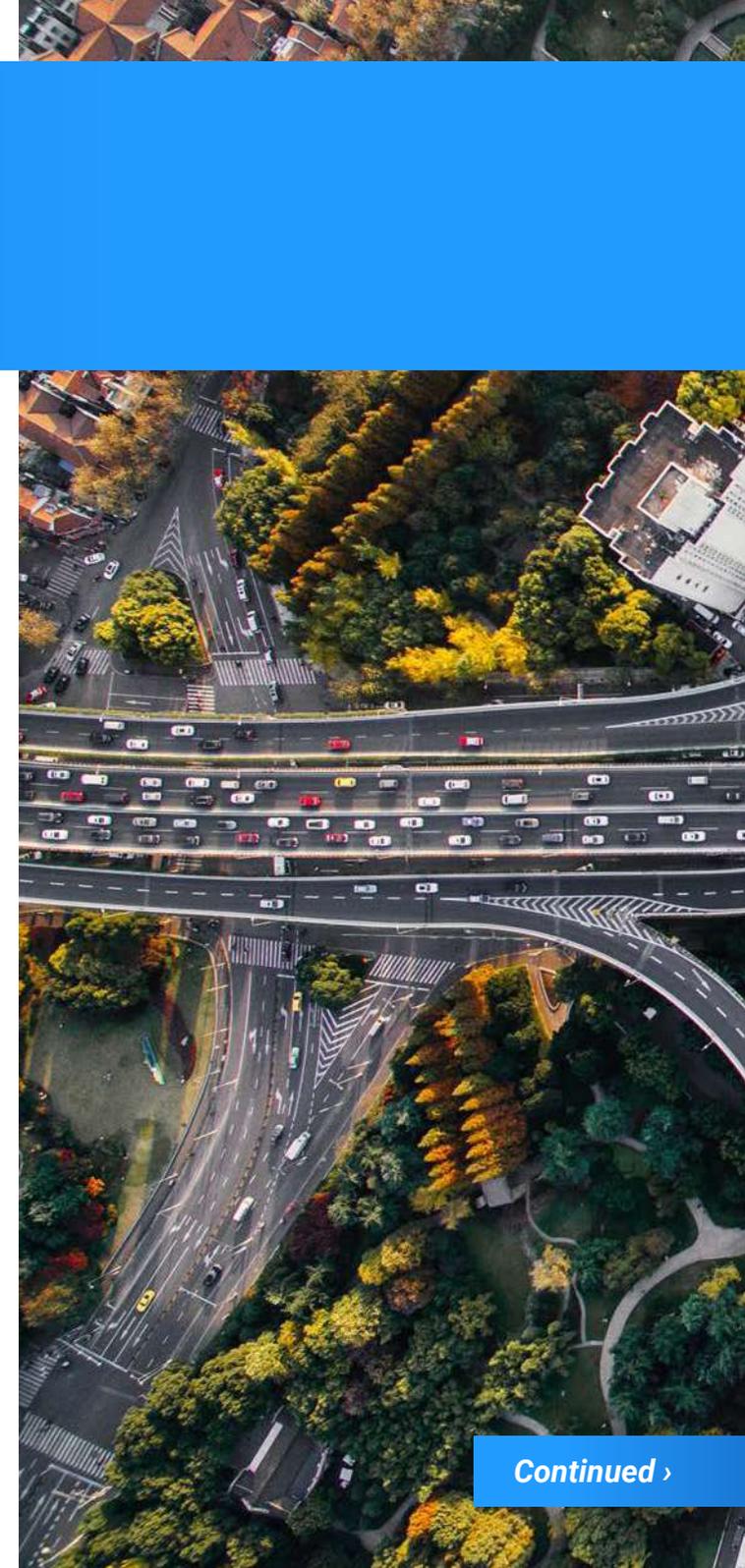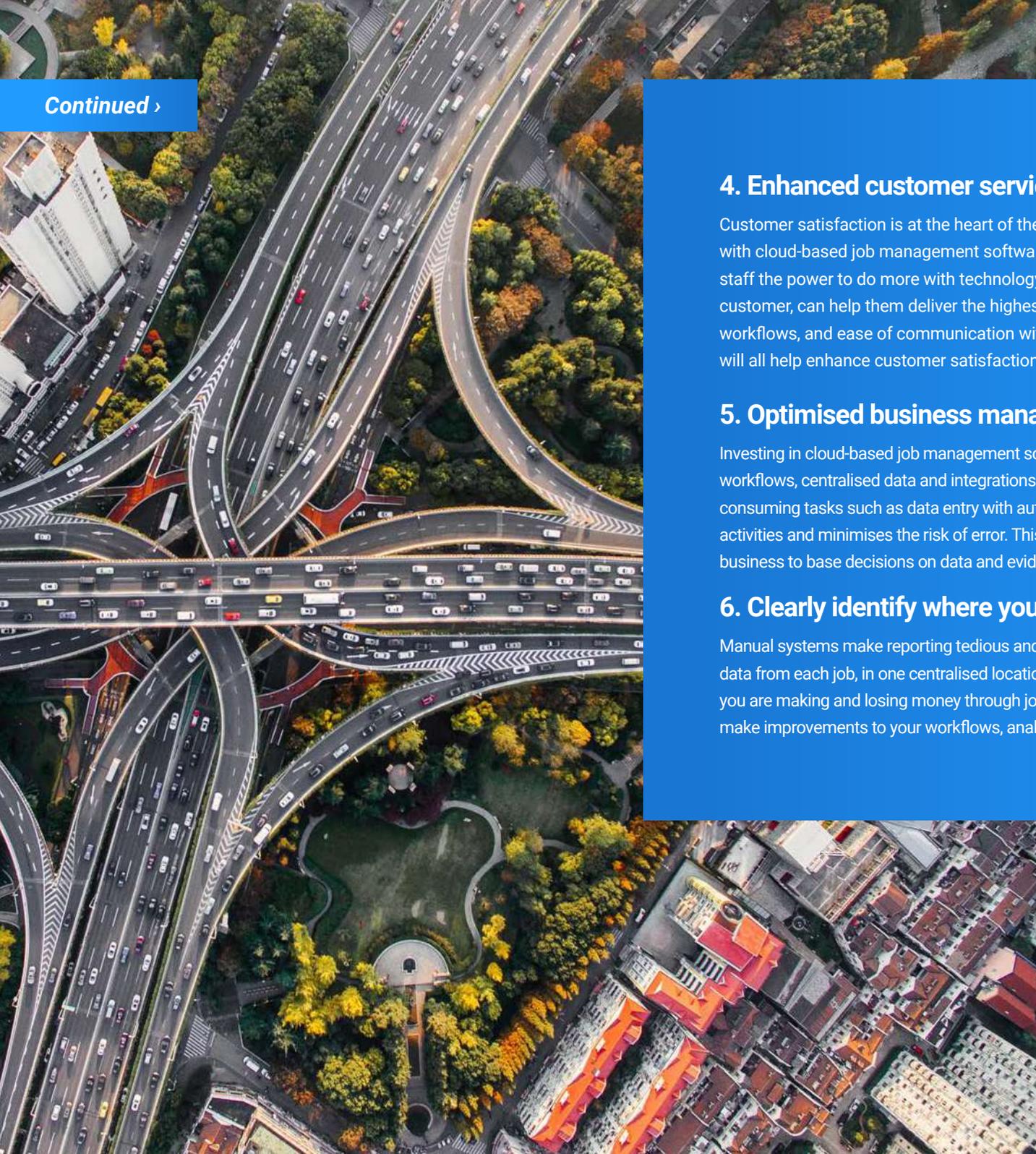
Continued ›

4. Enhanced customer service

Customer satisfaction is at the heart of the field service business model. The productivity and efficiency gained with cloud-based job management software has a direct impact on customer service and retention. Giving field staff the power to do more with technology and know more with up-to-date information about the site, job and customer, can help them deliver the highest quality customer service. Additionally, increased visibility of job workflows, and ease of communication with customers including updates on the arrival time of field staff, will all help enhance customer satisfaction.

5. Optimised business management

Investing in cloud-based job management software can lead to reduced overheads through the use of automated workflows, centralised data and integrations with third party applications. In the office, replacing manual, time-consuming tasks such as data entry with automated workflows frees up resources to focus on more value adding activities and minimises the risk of error. This automation also enhances visibility of data and makes it easier for a business to base decisions on data and evidence.

6. Clearly identify where you are making and losing money

Manual systems make reporting tedious and time consuming. However, cloud-based software captures all of your data from each job, in one centralised location, accessible from anywhere. This enables you to clearly identify where you are making and losing money through job costing and profitability reporting. Data collected can also be used to make improvements to your workflows, analyse the profitability of customers and even inform hiring decisions.

"It [simPRO] allows the guys to be quite autonomous in an ever-changing world. It's an essential element for every part of our job management."

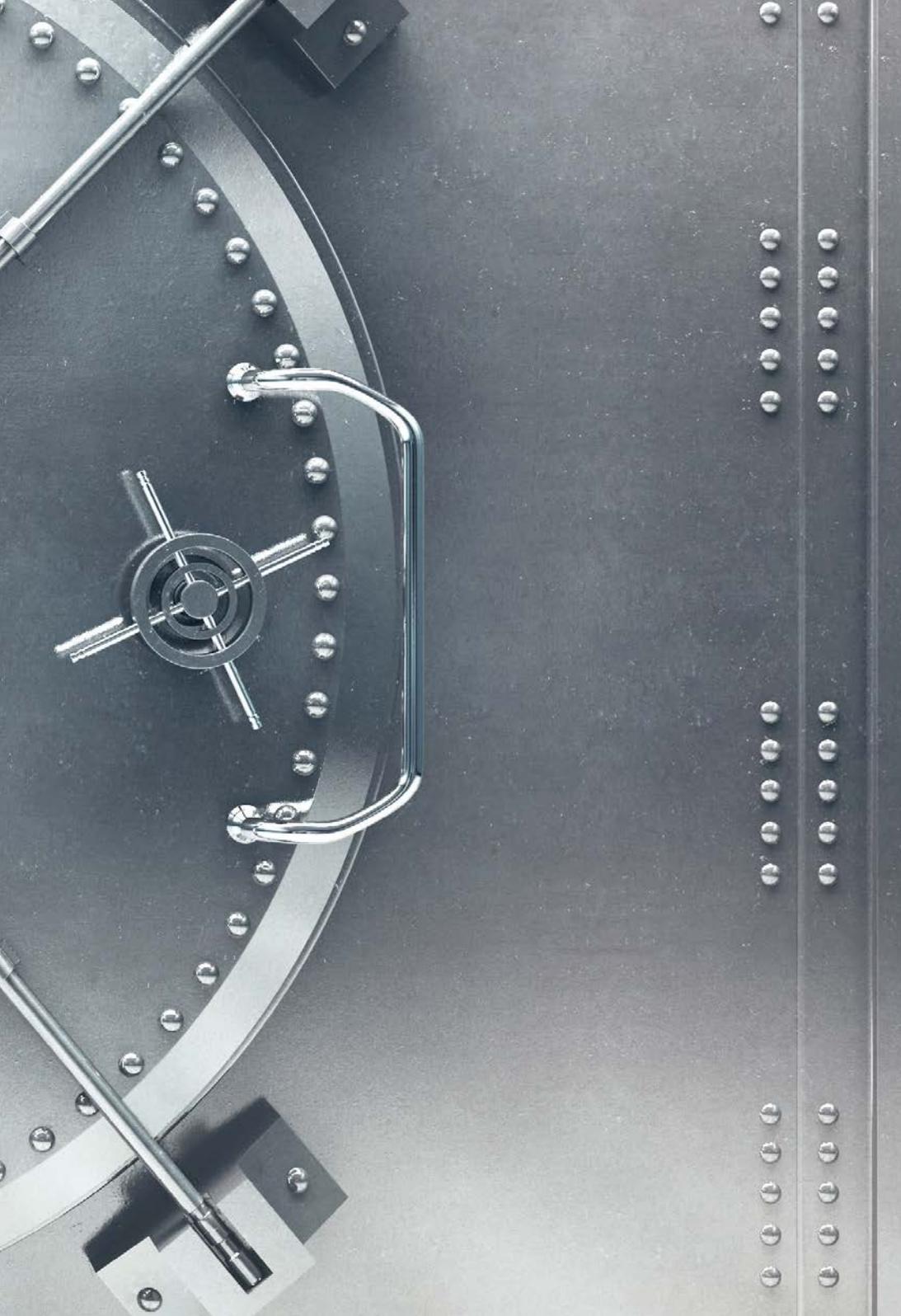**–Zachary Lawrence-Sansbury, Armitage Group Ltd**

BONUS TIPS

Making the change to new job management software

Once you've chosen your new job management software, the change management process will begin. However, implementing new software or processes in a business is no easy feat. Ensuring a successful implementation takes careful planning, ongoing communication and a solid strategy.

You'll also need a change management strategy to ensure the change is a success. Consider the following five steps to help you create a successful change management strategy:

1. Define the upcoming changes

2. Elect a change management team

3. Plan changing processes and associated goals

4. Create a communication plan

5. Map processes for measuring and reporting progress

"It's important to set expectations. If your teams are going to need to input job details in a different manner, make sure they are aware of this upfront so they can be prepared to adapt. For example, maybe your field staff could record their time in any format on paper work orders, but when you switch to a streamlined software platform those time logs will all need to be in the same format. Be flexible. As long as your overall efficiency goals are met, small changes should not throw your teams completely off course."

- Tina Espiritu, simPRO Implementation Manager

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