

Report generation



Report Generation

How easy (or hard) is it to get accurate and timely reports about your business?

Is your company as profitable as it could be? Are your employees as productive as expected? Do you know the exact value of your stock and consumables holdings in the warehouse and out in the vans? If you answered YES to any of the above, then I would ask, “How do you know?”. If you answered NO to any of the above, then I would ask, “Why not?”

There is a saying in business: *“If you can't measure it, you can't manage it.”* Now this is not true for all things. We can't measure how good a new hire might be before they come on board. We can't measure staff morale – we can only observe its characteristics. But we can measure some important things in our business. There are some business decisions that you cannot accurately make without empirical information. In order to get that accurate information, you need accurate and timely reports, and to produce reports, there are two factors you need to consider. One – the time it takes to gather the information for the report. Two – the accuracy of the information gathered.

Manually run systems tend to produce fairly accurate reports when they are actually produced. The problem is that, due to the time and effort required to gather all that information, up-to-date

reports tend to be few and far between (depending on the nature of the data being reported).

On the other hand, automated systems provide a wide array of information available at your fingertips. The problem here is that because a computer spat it out, people tend to believe the data presented as being true. How often have you given the go-ahead for a job because the computer said the parts were there and then you find they have been pinched for another job when you go to get them? The old saying “*Garbage in, garbage out*” is very true, so you must also have processes in place to ensure that your data is as accurate as possible.

Being able to produce timely reports is one of the greatest benefits of an integrated computer system. Information can be quickly collated from a variety of sources into a comprehensive management report. Another benefit is the time saving you can get from automating your reporting. Imagine if you could schedule your reports so that, for example, the employee time summary for the previous week could be in your email inbox every Monday morning. Or if your system could spit out a list of all the stock and consumables you need to purchase to bring your stock levels back in line.

The ability to accurately measure business performance in a timely manner can make the difference between a good business and a great one. Manual reporting requires resources, time and effort to produce accurate results. Timely and accurate reporting is an essential management decision tool that you, as a responsible business owner, should not take for granted!

Luke's story – how measuring results can increase your confidence and your profits

Luke has managed his family's air conditioning business for three years since his father retired. His wife runs the admin and he has dedicated admin staff that often work overtime to make sure all the paperwork is done correctly and on time. He also has in his team a very capable service manager who handles the daily scheduling for five field workers.

Prior to Luke taking over, his father ran the business more from gut feel than any systematic approach. The business is doing fine but Luke's training was different from his father's, who relied heavily on the day-to-day operations and the bottom line on his bank account to make financial decisions. His view is, if his field workers are busy, his admin staff are coping, invoices are going out the door and being paid, then he should have enough money to "get by".

Luke's business outlook is more progressive. He sees facts and hard numbers as the way forward. Luke prefers to develop business plans based on sound strategies, and knows he can only do that if he has timely and accurate information. Luke is fed up with the time it takes to get those figures out of his current mix of paper and unlinked computer systems.

Luke knows that this is not the way to run an efficient business. He wants to grow the business and knows that he needs a range

of financial and quantitative reports on a regular basis, without spending hours each week generating them. He researched several systems that had customisable report engines, so that he could tweak the reports to run just the way he wanted them. He also wanted to schedule various reports to be emailed or printed at the same time each week. At first, the staff was reluctant to accept the changes Luke suggested, as it meant them learning new procedures. However, after Luke discussed with them the potential benefits of having the system in the business, they agreed to it.

Luke is now able to produce profitability reports on all aspects of his business. He has identified his good customers and has implemented a special incentive scheme for them. His stock holdings have been streamlined and he can see which of his field workers really are performing. He is able to schedule his field workers more efficiently and plan his business expansion.

The bottom line is that Luke is now more confident in managing his business. He feels in control and has a handle on every facet of his operations. By integrating all aspects of his business and being able to report on it, he has now a concrete baseline to measure results and progress moving forward.

The staff are extremely impressed by the change in their business. Now everything is not only “just fine”, Luke knows the business is really doing well!

There are quite a number of reports that you can utilise as tools in your business for better and informed decision making. Some examples include:

- Quote conversion % and \$.
- Profitability by job type/industry (commercial & residential) / employee / season.
- Employee timesheet reports (to make sure that the \$ values used in the profitability report are accurate). The busiest employee might be recording the least amount of billable time, etc.
- Outstanding orders – items that have been ordered and not received or items which have been received but the supplier hasn't invoiced us yet. This is good to know for cash flow.

Some reports can get quite complicated so you might want to consider utilising a report writer to tailor the report exactly to your needs. As mentioned before, a very handy feature of some higher-end systems is a report scheduler that emails or prints reports out on a regular basis. This can save you much time and is also very impressive to your customers when they receive their monthly job summaries automatically in the mail.

Another handy feature you might want to look for is the ability to email invoices to your customers. I am not talking about sending individual invoices. I would assume most systems can do this. I am talking about the ability to take all your outstanding invoices, bundle them up and then send an individual email to each customer with all

their new invoices attached to the email. This is a real time saver and adds significantly to your business's professionalism.

Now sometimes the information you get back when you produce these reports is not pleasing to the eye, but at least you will see your business performance in black and white and then be able to act on it accordingly. Additionally, being able to report on all aspects of the business promotes accountability and transparency in your operations. Your employees know that they are accountable for all their work and that everything can be viewed at a click of a button (if you choose to do so).

Find the right system for your business and make sure that it includes a report generation facility that suits you. Not all report writers are built alike. With this new ability you will be able to regularly and accurately measure your business performance, and you will have improved control of your business future.



THE SERVICE MANAGER



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- Never miss invoicing jobs again
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 - Manage response times (SLA)
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