Eliminate inefficient scheduling

Inefficient Scheduling

Efficiently scheduling your workers' jobs is a critical element of running an efficient service business. Many small/medium businesses still rely on whiteboards to manage their work schedule. I recall walking into a company that literally had their walls lined with whiteboards. They were everywhere, including along the corridor. The entire maintenance schedule was on those whiteboards. When I asked the business owner what his most pressing business problem was, it was that people who walked along the corridor would rub their shoulder along the whiteboard and rub it out. This caused them significant operational angst, since they had no simple method of recovering that lost information. Needless to say this was just the tip of the iceberg when it came to changes this business needed to make.

As a business grows, the complexity of efficiently managing the workload increases dramatically, especially if you have scheduled maintenance contract agreements. Add cancellations and emergency callouts into the mix, and you can see that it is easy to lose a significant portion of your billable work with inefficient scheduling practices.

There are many variables involved in efficient maintenance scheduling that make it seem more of an art than a science to get right. The stakes are high too. If you are heavily booked, any changes

to your schedules that result from customer requests or scheduling mistakes can prove costly, leading to delays and negative effects on many other jobs.

There are many different factors that contribute to inefficient scheduling. Some of these include:

- Inefficient use of whiteboards and logbooks – they do not dynamically update, are easily be out-of-date, and can be prone to errors.
- Duplicated data because of different recording processes.

Your customer might have changed their equipment or dates of service, but your job dispatch system has not been updated. You really need a single source of information for all aspects of your business.

- No clear recording system in place. Whose responsibility is it to update your scheduling system? Who is notified of the changes and does this occur in a timely manner?
- Do field workers get called directly by customers or do the calls go via the office? If they are called directly, how is the office informed so that they can update any impact on existing scheduled work?
- No checks and balances, and no clear means of audit and review.
- Problems in deciphering handwriting.
- Insufficient confirmation of job arrival times with the customer can lead to callouts where the customer is not there.

- No clear process of allocating jobs, tracking jobs and scheduling jobs to the field workers.
- Manual scheduling causes stress, frustration and confusion to field workers, staff and even customers.

Richard's story – using a simple system to tackle those frustrating inefficiencies

No More Leaks Plumbing has been operating for just over two years and is struggling to keep afloat. Richard is the business owner and service manager with ten personnel – five field workers and five admin people.

He spends far too much time in the office finding ways to make his business run more efficiently. Each morning, field workers arrive at the office, deposit their paperwork for the previous day and get the job allocations for that day. It's a bit chaotic and often leads to stressful clashes with admin staff over the day's scheduling, insufficient jobs, customer information, etc.

They use a different system for booking in-service jobs from the system used to manage periodic scheduled maintenance. The service manager generally manages the schedules, writing them up on whiteboards. Beth the administrator handles the day-to-day job allocations.

When a customer called in with an urgent job for the next day, Beth checked the next day's job pile and saw that Fred was

available. So she created a new job and put it on the pile ready for him to pick up when he came in the following morning. But next day, Fred did not make an appearance. Wondering why, Beth called Fred, who told her that he was out all day on scheduled maintenance work. "Look on the whiteboard," he told her and, lo and behold, there he was.

This problem occurred simply because they did not have a single point of access to all customer, job and scheduling information. This is not the first time that it has happened, and the current system leaves far too much up to the operators, who have to remember to check in multiple places.

Richard realised that he could not afford these ongoing inefficiencies in his company. To survive in business, he needed a simple but complete system that put everything in one place, removing duplication and proving accessible to all staff, in and out of the office. He knew that the inefficient use of whiteboards and other manual scheduling tools leads to increased error and reduced productivity, so he needed to make changes and make them fast.

On the recommendation of his colleagues in the industry, Richard has found a system that is best suited for his needs. ***His business is small, yet dynamic, so he needs a system that is simple to understand yet complete.*** With the new system, Richard is assured that every job is efficiently allocated and tracked. He now has a visual calendar to see where everyone is scheduled. Each

entry is linked back to the relevant job, and jobs that overlap and double bookings are easily spotted. The system provides a simple drag-and-drop approach to moving jobs around when changes are needed and recurring jobs can be easily entered. No more missed jobs! No more double bookings! And on top of all of that, the field workers no longer need to come in to the office in the morning, since they can see all their jobs on a tablet they carry with them. This has allowed them to book an extra hour of work each day, increasing their productivity and the company's profitability.

Assuming you miss out on two jobs a month, due to double-ups, no-shows, etc, you will, on a typical $500 job, face these losses:

Missed job opportunity: Job Rate **x** 2x per month **x** 12 = $12,000

So anything you can do to reduce this is money in your pocket. Aside from the loss of opportunity because of double/overbooking and non-booking, it also frustrates and disappoints your customers.

Customers expect excellence from the services they receive. Confidence is quickly eroded when you fail to deliver the services promised and you lose out on current and potential future revenue.

So what's stopping you making that change?

"My business is in the red and I don't have the big budget and effort to make that change. Plus I don't think the business is big

enough to take that leap. I can't afford to automate. The manual process still sort of works anyway."

"Changing the system that we've grown accustomed to is difficult. I don't know how my staff can adapt to it."

Similar to the story above, you need to rethink your business process and find the appropriate system that can address your service operation requirements. I know that change can be difficult and stressful. Any new system takes time to get up and running smoothly. It's not just the software, but all of the associated procedures that need revisiting. You might experience resistance from your staff as well, but let me reassure you that it's all worth it for your business. You just need to find a system that works for you.

It's pretty simple: you need to implement a scheduling system that's easy to understand. You need to make information accessible to everyone, including your customer, your field workers and your staff.

Imagine having this in your system:

Easy-to-understand calendars – a Visual Assignment Calendar provides a powerful drag-and-drop scheduling tool for graphically assigning employees to job, in a convenient, daily, weekly or employee calendar view.

An automated Visual Assignment Calendar with real-time shared information that is accessible to all gives you much better

control of your business. Scheduling is now easier to manage and you can easily monitor your field workers.

> "Since implementing the system, we are able to manage field workers' time and jobs more effectively. Not only that, we are able to save several hours a day in admin time. I don't need to write it down over and over again, and I don't have difficulty in trying to decipher the notes and handwriting of the staff! We have a large monitor on the wall where everyone can see what's scheduled for today, and that really helps."

"Prior to putting up a system, we were only processing fifteen to twenty jobs a day. Now with the new system, we were able to add additional field workers and efficiently manage forty to fifty jobs per day. Imagine doing that with a whiteboard."

Be in charge of your business now. Focus on taking your business to the next level of productivity and profitability. Watch your profits soar, and spend less time at the office and more time where it counts!

THE SERVICE MANAGER

Organise Business

- Get information when it's needed
- Never miss invoicing jobs again
- Manage service and monitor contract renewals

Improve Productivity

- Customised to work the way you do
- Better management of multi-staged Jobs
- Web-enabled customer self-service
- Web-enabled technician access

Better Time Management

- Free up your time to maximise billable work
- Manage response times (SLA)
- Easily schedule technician's time

SCHEDULE YOUR JOBS, PRODUCE AWESOME REPORTS, EFFICIENTLY MANAGE YOUR BUSINESS ACTIVITIES!

That's what The Service Manager (TSM) software solution is all about!

With over 25 years of experience, TSM is an industry leader and pioneer in the field service management industry.

TSM is more than just a service management software company, it is committed to helping service companies solve their business problems and find hidden profits they don't even know they have.

Contact us

www.theservicemanager.com

Phone: +61 (0)2 9690 3888 | Email: sales@theservicemanager.com