Going Paperless!

The Bottom Line Benefits of Field Service Automation

Operational efficiency is vital to the health of any field service organization.

Shortening the time between the initial call and solving the customer's problem means higher customer satisfaction and more repeat business. When technicians are in the field and working with customers, revenues climb. When less time is spent deciphering a technician's handwriting and transferring information from one form to another, fewer mistakes are made and administrative expenses plummet. Running an efficient operation also means competitors have less of an opportunity to get a foothold in your customer accounts.

Unfortunately, too many field service organizations are still trying to do business the old-fashioned way. They get buried under mountains of paperwork and error-prone manual processes. Technicians sit idle as they wait for their next job to be assigned. The sales team always seems to be the last to know about new opportunities. Meanwhile, the organization's bottom line suffers as the competition **"eats their lunch."**

Going paperless isn't so much about eliminating paper – *although that's certainly a benefit* - as it is about streamlining operations by eliminating repetitive, time-consuming and manual tasks. In this ebook, we'll take you through six of the most time-consuming, error-prone processes in any field service organization and illustrate the tangible, bottom line benefits that automation can bring.

The call comes in...

It's Monday morning, and the phones are ringing off the hook. Since things always seem to break over the weekend when no one is around to fix them, Monday is the busiest day of the week. The more of these calls you answer, the more revenues you'll bring in. Of course, you also know that these potential customers won't wait. If they can't get through to you, most of them will hang up and call your competitor.

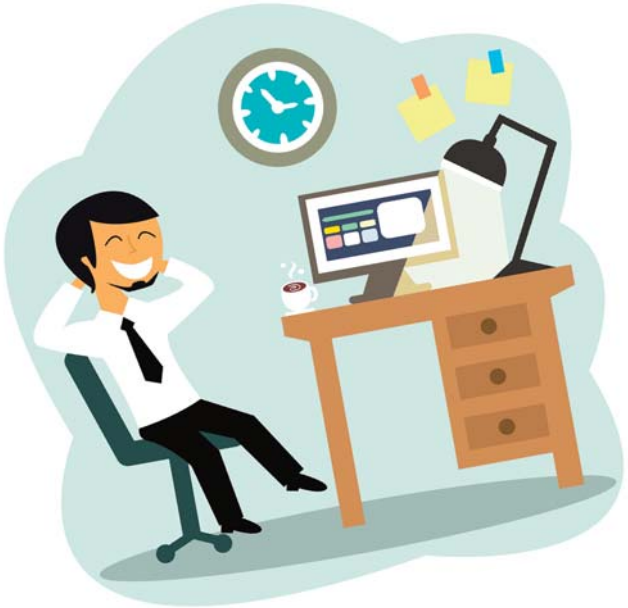
Joe, one of your best call-takers, is on the job. Let's take a look at what his day looks like before and after automation.

BEFORE

Logging calls is largely a manual process for Joe. Sure, the company has a computer system, but most of the data is entered by a handful of trained data entry specialists from the forms Joe and his teammates fill out.

As his phone rings, Joe grabs a new form. While the customer provides basic information, he jots down as much as he can. It's ok if his handwriting is barely legible. He'll clean it up and add the details later – *if he remembers them.*

With a promise to call back once he gets an appointment time from dispatch, he slaps the completed form on a pile, reaches for a fresh one, and grabs the next call. Meanwhile, the customer decides it wouldn't hurt to call around to some different companies while she's waiting for a call back.



AFTER

Joe's company has installed a field service application. Now, he can enter the information directly into the dispatch system while he's talking to the customer. Pre-configured tools help Joe capture all of the information the technician might need.

Instead of telling the customer she'll have to wait to find out when a technician might be available, Joe brings up a dispatch screen that shows the availability of technicians qualified to do the work. With the customer on the line, he schedules an appointment for that afternoon, and assigns it to a technician.

Efficiencies gained

Let's take a look at the benefits gained from fully automating just this one process.

Time saved. Eliminating the need to transfer information from one manual form to another dramatically cuts the time Joe and his colleagues spend doing paperwork. With the time saved, the organization can either take more calls or cut back on administrative expenses.

Fewer errors. By plugging the customer call information immediately into the system, there is no need for Joe to try to remember the details or for anyone to decipher Joe's handwriting. System prompts also ensure the call takers capture the required level of detail so nothing vital is missed.

Customer satisfaction. The customer is happier knowing when she can expect a technician, and she can arrange to be available when the technician arrives.

Competitive advantage. The customer isn't compelled to call around for a competitive bid because she's already committed by agreeing to an appointment time.

Dispatch and scheduling

We touched on dispatch and scheduling in the first process because these two activities can be covered in the initial call if the field service organization has the right tools. But, let's take a closer look at what happens during dispatch and scheduling before and after automation.

BEFORE

Dispatch picks up the stack of forms from the call center and takes them to the dispatch room. Here, a number of dispatchers sit in front of a large white board showing which technicians they have available and where they are in the field – at least as of the last time they reported in.

Greta, one of the dispatchers, reviews the call details on a form and decides she needs to talk to Joe because she can't quite make out the model number of the piece of equipment that needs service. Is it an A-1101 or an A-1107? She walks down the hall, and then waits for ten minutes for Joe to finish up with a customer. After squinting at his own handwriting, he assures her that it is an A-1107, the newer model on which several technicians have just been certified.

Greta walks back to the dispatch room where she pulls out a binder of technician certifications and makes a quick list of the technicians that are qualified to service the A-1107. She looks up at the board to check their availability just as Nick, one of the guys from sales, walks by with a cup of coffee in hand and a purple smudge on the sleeve of his jacket. Sure enough, Nick leaned up against the board again while drinking coffee and chatting with his buddies in dispatch. The entire afternoon has been wiped out for at least three technicians.

AFTER

Since Joe entered the information into the system while talking with the customer, the equipment was recorded accurately as the A-1101, a temperamental, older model with which only a couple of technicians have any experience.

Since the certification records and scheduling boards are maintained in the new system, Nick can lean up against the whiteboard all he wants. On his screen, Joe can easily see who is qualified and available to perform the service. He even has integrated maps so he can choose the closest qualified technician, reducing the customer's wait time even further.

Efficiencies gained

Automating dispatch provides a number of substantial benefits.

Administrative time. Because Joe has access to the system, the need for a separate dispatch team is eliminated. But even for organizations that choose to maintain a dispatch department, they no longer need to waste time clarifying information with the call takers since it is entered directly into the system.

Customer satisfaction. Entering call information into the system helps ensure that a technician who is qualified to work on the equipment is sent to the job site.

Billable time. Choosing a technician who is nearby and qualified maximizes billable time.

Reporting in

In all field service organizations, technicians check in after they finish a job so they know where to go next. However, there's a big difference on how this is done before and after automation.

BEFORE

Stanley, a technician, calls in and has to wait on hold for the next available dispatcher. No worries. He pours himself a cup of coffee from his thermos, tunes the radio to his favorite station and puts his feet up on the dashboard of his truck.

After a fifteen-minute wait, the dispatcher picks up Stanley's call. She looks up at the whiteboard. Stanley's finished up his last job ahead of schedule, and his next call isn't supposed to start for another hour. Furthermore, the notes on that call say that the customer won't be available until 3 PM so she can't just send Stanley to the call ahead of schedule.

Oh wait! Here's a job that's pretty close to the location of Stanley's last job. It says they need a technician certified for the A-1107, and Stanley is one of the three certified technicians. She puts Stanley on hold again while she calls the owner of the A-1107 to make sure she will be available if she sends someone over right away. The customer is delighted!

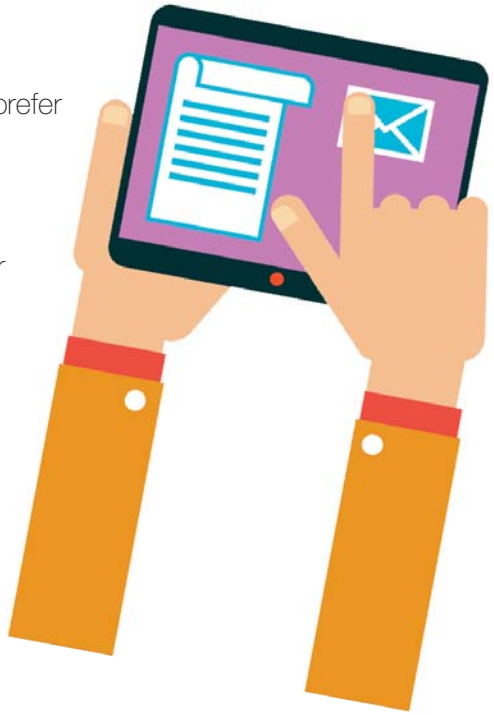
The dispatcher brings Stanley back on the line and relays all of the information he needs for the job over the phone. The dispatcher talks quickly because she already has another technician on hold on the other line, and she still needs to reschedule Stanley's afternoon call.

Stanley scribbles the details down on a blank work order. He's not familiar with that part of town, but he's pretty sure he can find the job site. After driving around for an hour, he finally calls dispatch again and asks for directions.

AFTER

Now, when Stanley finishes a job, he marks it complete on his tablet. (Some of his fellow technicians prefer to use their smartphone, but he likes his tablet.) Then he checks his schedule for his next job. He's not due there for another hour, but there are a couple of other small ones nearby.

One is for an A-1101 that needs service. Unfortunately, he knows nothing about that model. The other is for a piece of equipment that he's serviced many times. He accepts the second job on his tablet, downloads the work order information - including driving instructions. Then he makes a quick call to the customer to let him know he's on his way.



Efficiencies gained

For many field service organizations, optimizing technician time is crucial to improving business performance. *Automating this process provides some dramatic benefits.*

Downtime. In an automated organization, the technician doesn't need to call in to get the details for his next job. Eliminating hold time alone can put an extra hour or more of billable time back into a technician's day.

Customer satisfaction. Delighted customers turn unhappy quickly when a call has to be rescheduled because the technician isn't qualified to do the work.

Fewer errors. The work order information for Stanley's next job is automatically downloaded to his tablet, so Stanley doesn't need to try to read his own handwriting.

Streamlined dispatch. Since Stanley's tablet is connected to the main office, Joe's department can see that he's finished early and has accepted another job before his 3p.m. appointment.

Collecting the data

Friday has finally arrived. It's been a busy week. Somehow, all of the details of work performed need to get to billing so they can invoice the customers.

BEFORE

Stanley has kept track of all his jobs and the parts used on his work orders. Well, most of the information anyway. There are some details he didn't jot down because he was in a hurry, but he's pretty sure he remembers what they were.

He pours himself a big mug of coffee, grabs a couple of doughnuts and joins his fellow technicians in a conference room for their weekly work session. In addition to comparing "horror stories from the road," this is their time to complete their paperwork. Stanley pulls out his metal case and digs in.

Oops! He forgot to mark down when he left that customer. Was he there for an hour, or was it more than that?

He used some parts at a few jobs, but didn't write them down. What were they again?

Darn! He forgot to get a signature on that work order. Hopefully, the boss won't notice.

After two and a half hours of completing paperwork, Stanley hands the stack to Betty, the data entry clerk. She gives it a quick glance then glares at Stanley. Betty is always complaining about his handwriting. He knows it's not perfect, but it's not that bad, is it? Besides, it's her job to figure it out.

AFTER

Stanley carries his tablet with him everywhere. When a work order is assigned to him, a task list tells him exactly what he needs to do and the parts he needs to get the job done. When he finishes a task, he marks it complete on his tablet. Since it prompts him to put in his end time, he can't forget it. If he uses an extra part or two, he adds it to the work order. The system also prompts him to get the customer's signature. Once the job is complete, his system automatically sends the information to the computer system at the office, updating time spent and order status as well as relieving inventory.

Sometimes, Stanley's work takes him to remote sites and big, metal warehouses where the Internet reception isn't so good. That's OK. He can still enter the information offline, and the system will automatically upload it once the connection is restored.

Stanley misses his Friday morning gab sessions with his cohorts, but at least he doesn't need to try to remember everything. He thinks he even saw Betty smile the other day. She must like her new job in purchasing.

Efficiencies gained

Collecting the data from the work orders and transferring it into the system is one of the most error-prone and time-consuming processes in any field service organization. Let's take a closer look at the efficiencies gained by the highly evolved organization:

- **Data accuracy.** The technicians no longer have to try to decipher their scribbles on the work order or remember what they did days later.
- **Increased billing.** Parts sales can actually go up after automation. Not because more parts are being sold, but because the parts that are actually used are being billed for accurately.
- **Inventory accuracy.** When the system accurately records what is used on the job, inventory accuracy goes up. No more wondering where all those spare parts went.
- **Downtime reduced.** In some organizations, technicians can spend as much as five to six hours a week filling out paperwork. Automation can increase utilization rates by 10 percent or more.
- **Administrative time.** In an automated organization, there is no need for a staff of data entry clerks to reenter data from work orders into the system. That gets done automatically and in real-time.

Billing and Getting Paid

Even when business is good, cash flow can be a problem for many field service organizations. Lag times between work completion and billing can be as much as sixty to ninety days. The longer it takes to bill, the harder it can be to collect.

BEFORE

Betty takes the stack of work orders to her desk. She sits down, pops a couple of pain-relievers, and gets to work plugging all of the barely legible data into the system. By mid-afternoon, she's only halfway through the stack. She calls her family to let them know she'll be coming home late from work – again.

Around 4 p.m., her manager comes into her office with a new stack of work orders that one of the technicians found under the front seat of his truck. They're more than a month old so Betty needs to get them entered as soon as possible. Unfortunately, the ink has faded, and it looks like something got spilled across several of them. She's going to need to call the technician to see what he remembers about these work orders. She takes another pain reliever and picks up the phone. It's after 8 p.m. by the time she finally switches off her PC.

Once she's done entering the information, it's the billing department's turn. Before working up the invoices one-by-one in their word processing software, they'll need to reference each customer's binder to get answers to questions like *Do I need a PO? Which price list are we using for this customer? Do they get any special discounts?* In this organization, it takes a staff of ten full-time billing agents an entire month to complete the process.

AFTER

Each time Stanley and the other technicians mark a job complete on their tablets or smartphones, the information is automatically transferred back to the home office systems. Inventory is relieved. Time spent is updated. Betty has moved to purchasing where she feels she's finally adding more strategic value beyond her ability to decipher the technicians' handwriting. She's also eating dinner with her family again.

Billing is now handled by one individual. Each month, Roberto processes the invoices. The organization has considered billing some customers upon work-complete to speed up cash flow even more, but so far, they are still doing billing at the end of the month.

When Roberto runs through the billing process each month, the system automatically checks the customer master file for critical information such as price lists, discounts, and terms and produces a professional-looking invoice. After briefly checking through them, he mails invoices to those customers who need a paper copy and sends an electronic invoice to the rest. The entire billing process takes Roberto less than a day. The rest of the time, he's helping out in accounts payable and purchasing – and sometimes even takes a turn in the call center as business is really picking up.

Efficiencies gained

Automating the billing process is essential to ensuring a healthy cash flow. Here are just a few of the efficiencies gained:

Increased revenues. In the automated organization, work orders don't get lost in the field and the amount of revenue that gets billed for increases.

Faster cash flow. When the end-to-end process is automated, the lag time between work completion and billing can be cut down to a day or less. In our example, the organization has opted to bill at the end of the month, so at most, the lag time
is thirty days.

Fewer disputes. Almost all field-service experts agree that cutting the time between work completion and invoicing reduces billing disputes and speeds up collections. Customers remember their pain more vividly, and they remember what the technician did to fix it.

Less overtime. No longer do data entry clerks need to stay late or work over the weekend just to get data into the system.

Reduced staffing. Results vary across organizations, but it's not unusual to see the need for a billing department staffed with several people reduced to just one when processes are fully automated.

Opportunity Knocks

Finding new opportunities is essential for any field service organization. The best place to find these opportunities is with existing customers who already know you and appreciate the work you do. Unfortunately, too many field service organizations don't open the door when opportunity knocks.

BEFORE

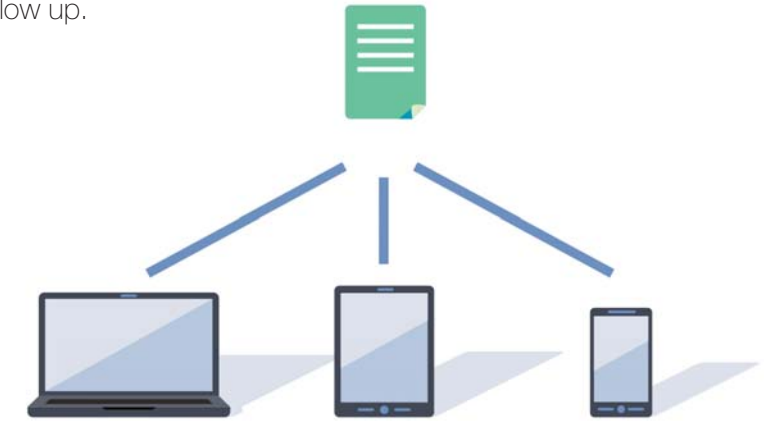
The work orders the technicians carry around with them have a comment box where they are supposed to mark down additional work the customer might need. Stanley runs across these opportunities all the time. If he can do the job right away, he'll give his customer his own "personal estimate" for how much he thinks it's going to cost. Then, he scribbles down what he did on a work order and adds it to his files. When the job is more complex, he'll mark down a few notes in the comment box. All of the technicians assure management they do this on a regular basis.

When Betty gets the work order, she tries her best to decipher the opportunity. Sometimes, she's successful, but just as often, she can't figure out what it is the customer needed. With her work piling up, she doesn't have time to call the technician for clarification. Besides, even when she sends an email to sales about the potential opportunity, they never respond to say they got it – not even a thank you.

AFTER

With the new system, Stanley can enter the opportunities he uncovers at the customer's site into his tablet. It even allows him to do some estimating for common opportunities with standard prices preprogrammed, so he gets it right. For more complex opportunities, he jots down a few notes on his tablet. He doesn't need to include too much, because the system is set up with "trigger words" that fill in many of the details.

This information is sent immediately from Stanley's tablet to Nick's PC. He is the salesperson responsible for this territory, and the details he needs to follow up with the customer are all included in the opportunity record. Management even has a dashboard set up showing how many opportunities were referred to Nick from technicians and how he's doing on follow up.



Efficiencies gained

In field service organizations, as much as 30 – 50% of the typical sales professional's quota is made through sales to existing customers.

- **Shorter selling cycles.** Existing customer opportunities typically close as much as 50% faster than new customer opportunities.
- **Captured opportunities.** With prompt follow up from sales, customers get their problems resolved faster. There's also less of an opportunity for them to decide to call a competitor.
- **Accurate billing.** Technicians no longer need to guess at how much a job will cost before they do the work.
- **Increased revenues.** More opportunities uncovered, better follow up, higher close rates, shorter selling cycles and more repeat business – it all adds up to higher revenues.

How much can you save?

As you read through these six processes, perhaps you've already pulled out a calculator and started doing your own calculations. Let's walk through some of the most common cost savings and revenue enhancers we discussed and calculate how much a typical company might save per year.

Process 1: The call comes in

_____ Estimated number of hours spent per month entering data from call sheets into other forms or systems.
x _____ Avg. cost per hour
= _____ Average administrative cost savings per month
x 12 *(months in a year)*
= _____ Annual savings in administrative expenses

Process 2: Dispatch and scheduling

_____ Total number of dispatchers on staff
x _____ Average annual salary
= _____ Average annual savings in administrative costs
+_____ Number of times per year the wrong technician is sent to a job site
x _____ Average number of hours wasted per incident

x _____ Average hourly billable rate
= _____ Savings from reduction in dispatch errors

Process 3: Reporting in

_____ Number of hours spent per week per technician reporting in *(including hold time)*
_____ Number of technicians on staff
x _____ Average billable rate
x 50 *(avg. number of work weeks per year)*
= _____ Average annual cost savings

Process 4: Collecting data

_____ Number of hours spent each week per technician finishing paperwork
_____ Number of technicians on staff
x _____ Average billable rate
x 50 *(avg number of work weeks per year)*
= _____ Average annual cost savings

Process 5: Billing and getting paid

_____ Annual write-off due to disputed charges
x _____ Estimated percent of write offs due to billing delays.
(This varies by organization. Those with severe billing delays can be as high as 50%. Average is roughly 10% when billing is delayed by more than 10 days.)
= _____ Annual savings

Process 6: Opportunity knocks

_____ Existing customer revenues
_____ Estimated percent increase from better opportunity tracking.
(Varies by organization, but many field service organizations see anywhere from a 10 – 25% increase when they automate the process of identifying opportunities in the field.)

About WennSoft

Founded in 1995, WennSoft delivers innovative field service solutions that streamline operations from sales to the field to accounting, arming customers with the insight they need to do their work more proactively, productively and profitably. Connections across the organization are key for those who want to better manage installation, maintenance and repair processes and WennSoft solutions help make them happen. Contact us and our team will work with you to explore the options that are right for your business.

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