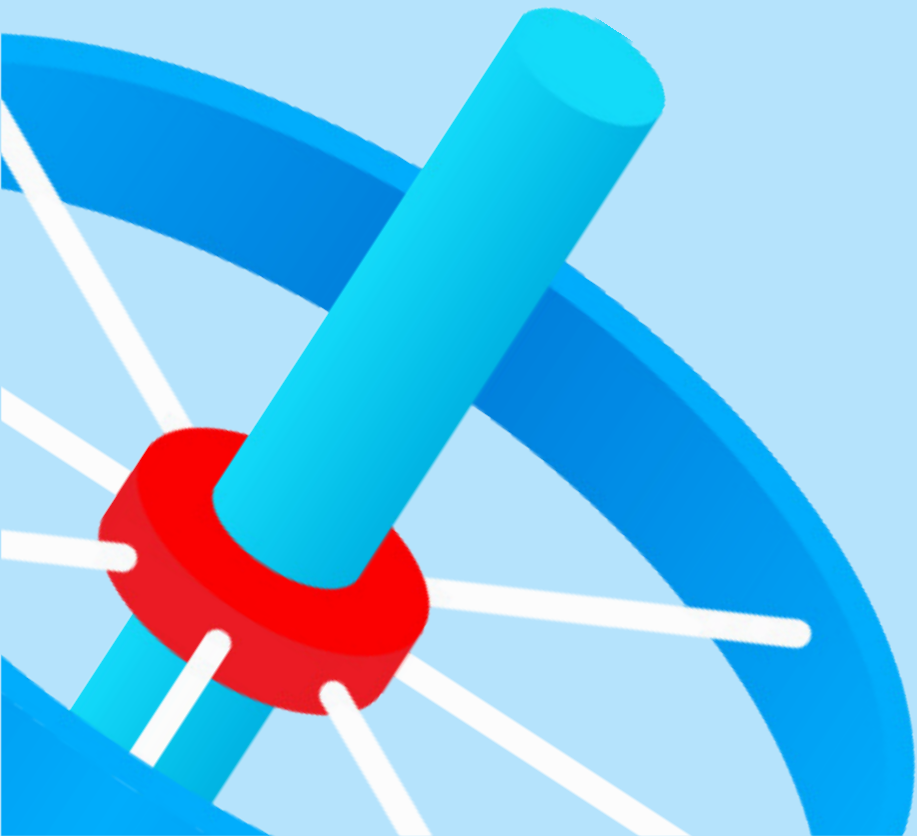




# **Modernizing Your Mobile Field Organization**



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# Modernizing Your Mobile Field Organization

HOW TO IMPROVE THE SPEED, ACCURACY,  
AND VALUE OF FIELD OPERATIONS AND  
ACHIEVE BUY-IN FROM YOUR TEAM.

Modern technology is, in many ways, a double-edged sword. Take email, for instance. It has made communication easier than ever — at work and at home — but with 24/7 access, it's harder to “clock out” at the end of the day.

So it's understandable that the word “modernize” can elicit strong reactions, both positive and negative, when talking about your workforce.

For most companies, the ideas of going paperless, leaving spreadsheets and outdated legacy systems behind, automating processes, and leveraging more accurate (and rich) data and improved analytics are all good things.

On the flip side, “modernizing” can also mean enduring a mildly painful transition that includes the frustration of engaging with IT, the cost of hiring programmers, and the uncertainty of dealing with network issues and questions about reliability.

If you’re concerned about some of those things, be assured that you’re not alone. Your field team probably includes some folks who have a hard time adopting new technology, and who are afraid of what could go wrong. They’ve been relying on their existing processes for years; yes, they may be clunky, but at least they work.

And the more advanced technology you consider, the bigger those worries. You hear about things like IoT, SaaS, and the cloud, but how do you know if your team is ready for them? Will they pay off or backfire?

**This guide was designed to help you begin the process of modernizing your field workflows with confidence, adopting technology at a pace that won’t overwhelm your team — or your IT department.**

01

# **Unique Challenges for Mobile Field Organizations**



You face a different set of challenges from other companies because of the geographic distribution of your teams.

In an office environment, managers can easily stop by their employees' desks to comment on their work, or call everyone into a quick meeting to share important information.

With a mobile workforce — especially if geographically dispersed — it's more complicated to clearly and regularly communicate with your people, which makes it harder to manage them and get consistent results. And the more often you bring them together physically, the less time they spend doing their jobs in the field.

Monitoring where your field staff is at any given moment is nearly impossible, so it's difficult to verify that your workers are where they say they are, what work is being done, how long it takes them to get from one site to another, or —thought we don't like to think about it— that they're not engaged in fraudulent activities.

They say you get what you measure, and when it's hard to monitor your team's performance it can be difficult to increase their efficiency or drive significant process improvements.

It's also harder to praise and reward them for a job well done, or to help those people who are having a hard time for one reason or another. Better data about their activities in the field would make it possible for you to properly manage them, but that data can be hard to come by.

## **EASY SOLUTIONS**

Mobile technology can help you make your field organization more data-driven, as well as incorporate the valuable data they collect into larger corporate workstreams, analytics, and performance assessments.

Getting the information you need in a timely manner is a challenge, too, because your people have to stop what they're doing to send you the data they've collected (via email, phone call, or text, for example) — and to do that, they need to be connected to a network. In the meantime, you're stuck in limbo.

Mobile technology that is available today can help you address all of these problems. It can help you make your field organization more data-driven, as well as incorporate the valuable data they collect into larger corporate workstreams, analytics, and performance assessments. Even better: It's easier than you might think.





02

# How to Get Started

Once you've made the decision to modernize, you want things to move quickly, but you also need to minimize risk. Diving in head-first, especially with a workforce that has been following the same procedure for years, can result in frustration and costly mistakes, causing implementation to drag out — or worse, fail altogether.

A good place to start is by identifying tasks that could clearly be done better using technology that is demonstrably reliable and easy to use.

Pick something that will have a fallback method people can use if they're having trouble. Then, as your team buys into the new process, you can gradually incorporate it into other parts of your business.

To begin, think about all the things you and your teams need to accomplish and list them as separate tasks.

These might include:

- ▶ Communicate jobs to your field staff (where they need to go, what to do when they get there, how long it should take them, and what standards they should follow)
- ▶ Deploy your teams — they need to go where the job is
- ▶ Do the work

- ▶ Document the work (for example, fill out an inspection form, verify a delivery, or complete a work order)
- ▶ Report on the work (so it can be analyzed for managing workloads, cutting costs, supplying information to auditors, ensuring compliance, etc.)

**Once you have broken your team's workflow into smaller tasks, choose modernization projects that can affect the most tasks the most easily.**

03

# **Digital Data Collection**

One of the first technological improvements you can make—one that will have an immense and immediate impact—is moving to digital data collection. Transitioning from pen-and-paper to digital comes with a long list of benefits. For example, it:

**Gives you real-time insights into what your teams are doing.** They collect a record, and can access it instantly (or, if they're offline, as soon as they reach connectivity), without them having to perform outreach to you via phone, text, or email.

## KEEP THE MOMENTUM

A mobile app with a checklist helps your workers follow the correct, step-by-step process you need them to do, even if you haven't had a chance to go over it with them recently.

**Improves reliability.** A mobile app with a checklist helps your workers follow the correct, step-by-step process you need them to do, even if you haven't had a chance to go over it with them recently.

## WORK SMARTER

With data that is formatted consistently, it's easy to create templates that immediately crank out reports as soon as the data is synced.

### **Improves documentation and evidence.**

Pictures, video, and audio of their work gives you better, more reliable evidence of what was done and how thoroughly — you don't have to physically be there to supervise. Records that are time-stamped and geotagged verify when and where the work was completed.

### **Improves both data quality and speed.**

Instead of entering information twice — once on paper, then again when transcribing it into your database — data is taken directly as it is entered. No more transcription errors or wondering what the team member might have meant by that illegible scribble.

**Seamlessly ties in multimedia.** Because digital collection brings the data fields and the multimedia fields together in a single app, you don't have to do things like match up inspection records with the corresponding photo or videos.

**Streamlines job reports.** Instead of waiting for people to get back to the office to get the data, information can be synced from anywhere there's cellular or WiFi connectivity. And because the data is formatted consistently, it's easy to create templates that immediately crank out reports as soon as the data is synced.

**Prevents lost data.** Once the data is synced, it's there. No worrying about spilled coffee obscuring a signature, or paper getting lost in the shuffle. Auditable signatures are captured and stored permanently.

**Makes analytics a faster and easier process.** By capturing data quickly and making it available for analysis in real-time or near-real-time, you can make faster decisions. (For instance: Where should you deploy people tomorrow, or even later today?

Who is the best person to handle a particular kind of job? What items are failing the most inspections, and how quickly can those things be fixed?) And by making that data available to more people within your organization, you'll be contributing to a more complete picture, too.

Will there be someone on your team who struggles with the transition to digital data collection? It's possible, especially if you have employees who aren't digital natives. Could that person continue to follow the old paper-based process? Sure. Just keep in mind that means that someone else still has to transcribe that data.

Once your new system is up and running and that tedious task has been removed from the equation, no one's going to want to!

## WHAT IS A DIGITAL NATIVE?

A digital native is someone who was brought up using digital technology and has been familiar with computers and the internet since an early age. (Generation Z are digital natives. So are most Millennials.)

Rest assured that switching to digital data collection will make life easier for most (if not all) of the people on your team.

There are two things you might want to think about at this point.



**1. Do you want to ask your IT department to help you with the transition?**

IT might be excited about getting you off the ground, but what often happens is that they create something purpose-built for you, and then struggle to maintain it. (Or, more accurately: Your problem is just one of many in their backlog and it will take them time to get to your problems.)

If you decide to bypass IT, flexibility will be one of the most important features of your digital data collection solution. You'll want to prototype, create, and modify your processes without having to call IT.

**2. Should you move to a SaaS (or cloud-based) solution?**

Installing software of your own means you are burdened with managing both the software and the hardware it's installed on, including things like upgrades. An online service — or SaaS model — is more likely to give you what you need without requiring you to manage the technology on top of your teams. Plus, you can access it from any computer at any time — without having to lean on IT.

## WHAT IS SAAS?

It sounds like jargon, but it's something more than 4 billion people around the world use all the time! SaaS stands for Software as a Service, which means the software is cloud-based, so you use it online rather than installing it on your own computer (which means updates occur automatically, and you don't have to buy a new version every year). Facebook, Zoom, and Salesforce are all SaaS products.

## WHAT IS THE CLOUD?

The “cloud” refers to servers that can be accessed via the internet. When you use “cloud storage,” you are letting someone else store your data for you, but you can access it at any time. Though some people struggle with the idea of moving their data to the cloud, it's not unlike storing your money in a bank. Cloud storage enables flexibility that otherwise would be difficult, just as it's easy to take out money at an ATM when we need it. Think of the cloud as a bank for your data.

(By the way, the cloud is very secure. There are probably more people at Amazon, Microsoft, or Google managing security and fending off hackers than at your company.)

04

# **Stepping up to Automation**

Once you take the initial step of digitizing data collection, you'll start to see your data flow more easily. That means you can use it in new and better ways, which is an exciting prospect. The more ways you're able to use your data, the more valuable it—and the work your teams are doing—becomes.

There are seemingly endless ways to streamline your workflows, from simple notifications to more complicated automated processes.

**Start small:** Trigger workflows when specific events occur — for instance, when a piece of equipment fails inspection. Who needs to be notified? Should it be through email, text, or something else? Think about how you might improve field performance by proactively sharing information to the people who need it. (Note: This is often most important for the folks who are actually working in the field, so you might want to consider their needs first.)



**Think bigger:** Consider which portions of your workflow can be automated completely, or occur with minimal human intervention.

At this point, you're going to want to engage with IT, providing them with data feeds they can "pull," or provide standardized ways to "push" data into their systems (e.g., APIs or webhooks).

## **WHAT DOES IT MEAN TO “PULL” AND “PUSH” DATA?**

“Pull coding” is a type of network communication. When you pull data, you retrieve it by requesting it from the server. The server then pushes the data into your system.

## **WHAT ARE APIS AND WEBHOOKS?**

Simply put, APIs and webhooks are methods of connecting different software applications. An API (which stands for Application Programming Interface), is a way to programmatically request data from one system into another. Webhooks are predefined instructions that notify systems to send specific data to another when certain events trigger it.

05

# **Round It Out with Analytics**

# As mentioned earlier, data becomes more valuable as more people use it.

Pushing your data into a format where it can be analyzed to continually optimize your workflows, workforce management, and other business processes, exponentially increases its usefulness.

This is an important point to communicate with other stakeholders when you start talking about modernizing your field operations. Consider, for example, how customer support, sales, marketing, and operations might be able to use the data your field teams collect. Finally, consider how your customers might benefit from whatever pieces of data you can share.





06

# Conclusion



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**By making the data your employees collect in the field more valuable, you also increase your team's value to the organization.**

Modernizing your field operations today will pay dividends well into the future. First, by helping you acquire data with better breadth, accuracy, and quality; second, by providing you insights that can help your team perform better. And by making the data your employees collect in the field more valuable, you also increase your team's value to the organization.

For example, field teams who install, inspect, or manage hardware installations can do less rework and deliver higher customer satisfaction and a better understanding of the conditions that affect their performance. Safety-oriented teams can ensure fewer accidents, identify near-misses more precisely, and correct hazardous conditions more quickly. Quality teams can collect better data about why quality targets get missed and make better recommendations for improvements.

In other words, everything you do, you will do better — verifiably so.

Some of those improvements will be evidenced by hard ROI. Some will be shown in other metrics. But no matter how they manifest, you will see a difference in your teams, the people they support, and the business results you get.

Visit [fulcrumapp.com](https://fulcrumapp.com) for more resources on digitizing data collection and automating workflows for your mobile teams, or to request a demonstration of our no-code solution that was designed specifically for field organizations.



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