SIMPLIFY THE MANAGEMENT OF YOUR FIELD OPERATIONS

THE CONNECTED ENTREPRISE - CONNECTING THE FIELD AND THE OFFICE

COMMON PAIN POINTS

ADVANTAGES OF MOBILE FIELD SERVICE SOFTWARE

PROJECT CONSIDERATIONS

DOES THIS PROCESS SOUND FAMILIAR?

95%

ExpandIT has found **95%** of businesses who perform service and installation work have similar processes. This doesn't mean your business isn't unique. It does mean that there are some standardized best practices for handling aspects of your service business.

Typical service flow:

- Customer requests service
- Work order is created
- Work order is assigned to a resource
- Resource performs work consuming time and materials
- Work order is either completed or resource must return at later date
- Information, such as time, is communicated to accounting for invoicing
- Customer requires a report
- Resource is assigned to next work order

COMMON PAIN POINTS

For organizations using **disconnected processes** to run their business there are a number of pain points. These include:
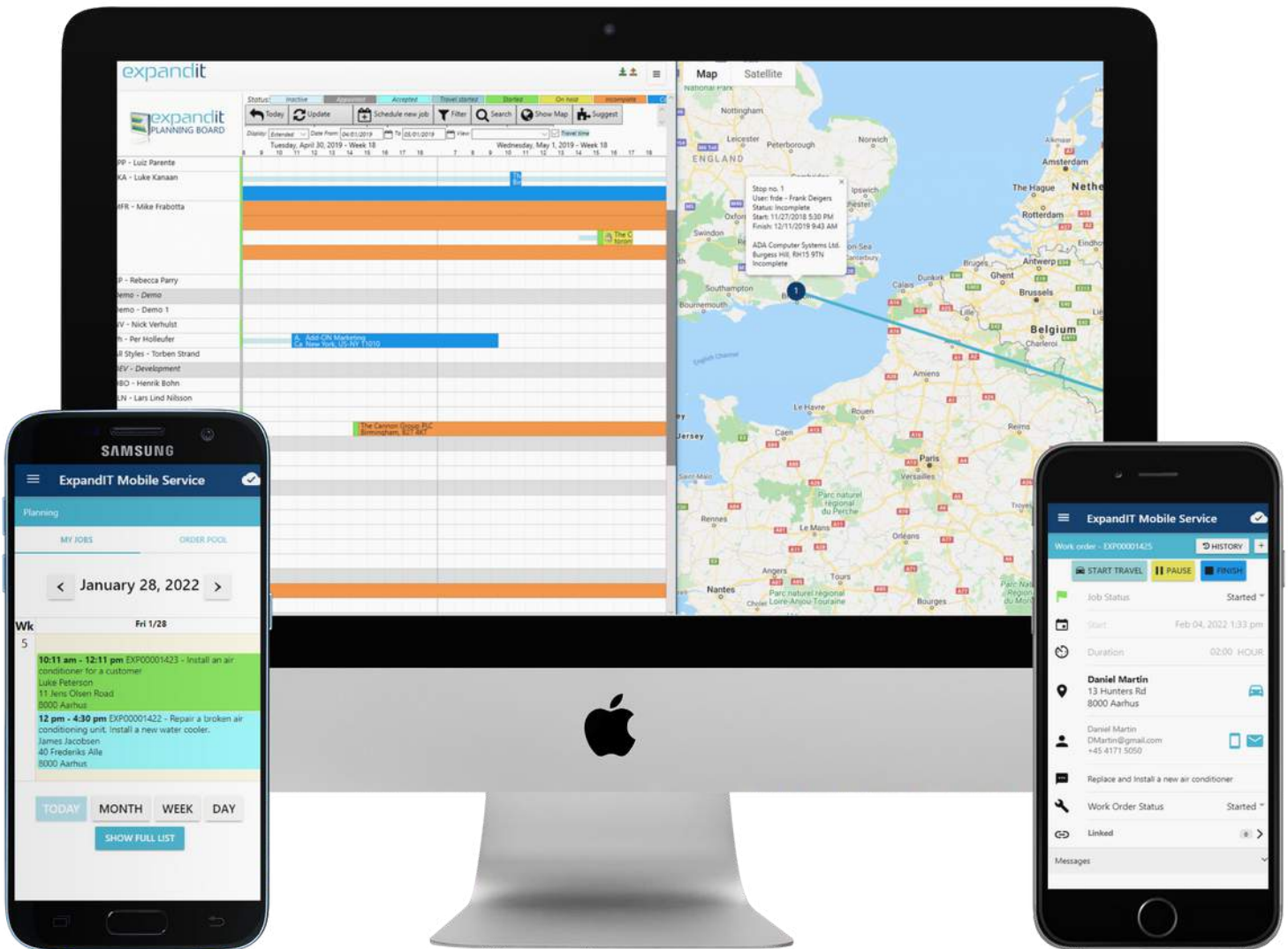
❌ Errors and lost paperwork

❌ Difficulty making real-time adjustments

❌ Administration processes are not scalable

❌ Poor communication makes customers feel left in the dark

❌ Incorrect invoicing and delays result in credits and less cash

❌ Inability to track job status

❌ Extra time is spent providing information to stakeholders

END-TO-END SERVICE FLOW

BUSINESS CENTRAL AND EXPANDIT PROVIDE A SEAMLESS CUSTOMER JOURNEY

In less than 6 weeks onboarding you can provide your customers with a seamless journey. Everything from requesting service, allocating resources, work instructions, first-time-fix, compliance, invoicing, payroll input and follow-up can be handled with one comprehensive cloud solution that is always up-to-date.
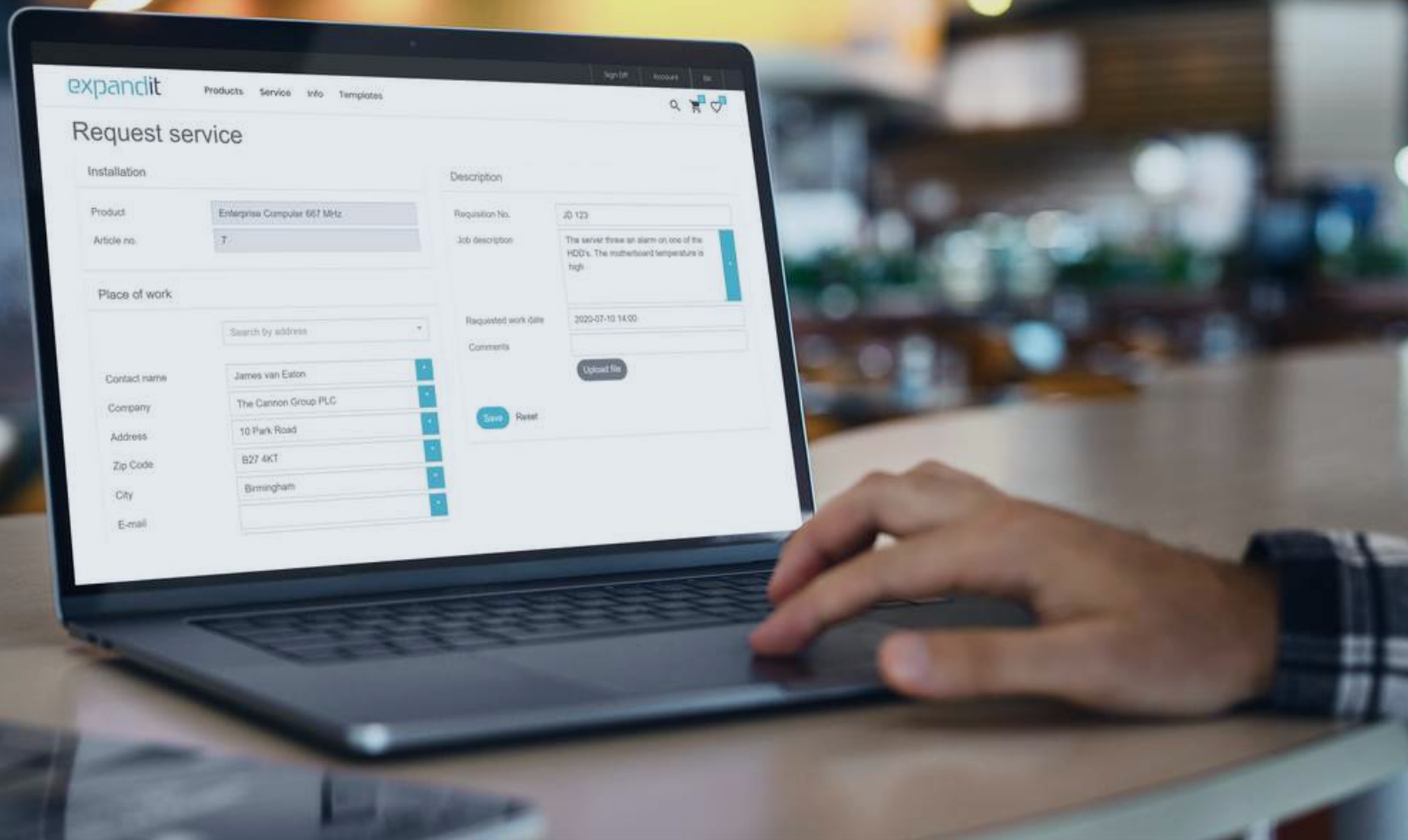
Request service → **Planning & resource allocation** → **Execution** → **Invoicing** → **Service portal**

ADVANTAGES OF A
DIGITAL SOLUTION

ExpandIT translates financial planning in the ERP system into time and resource-based work order planning. This enables organizations to reduce errors, improve customer service, and increase cost and time savings.

The **top five** advantages of digital solutions are:

1 Elimination of manual processes

2 Improved scheduling

3 Resource optimization

4 Increased first time fix rates

5 Faster invoicing and payment

NO MORE PAPER FORMS
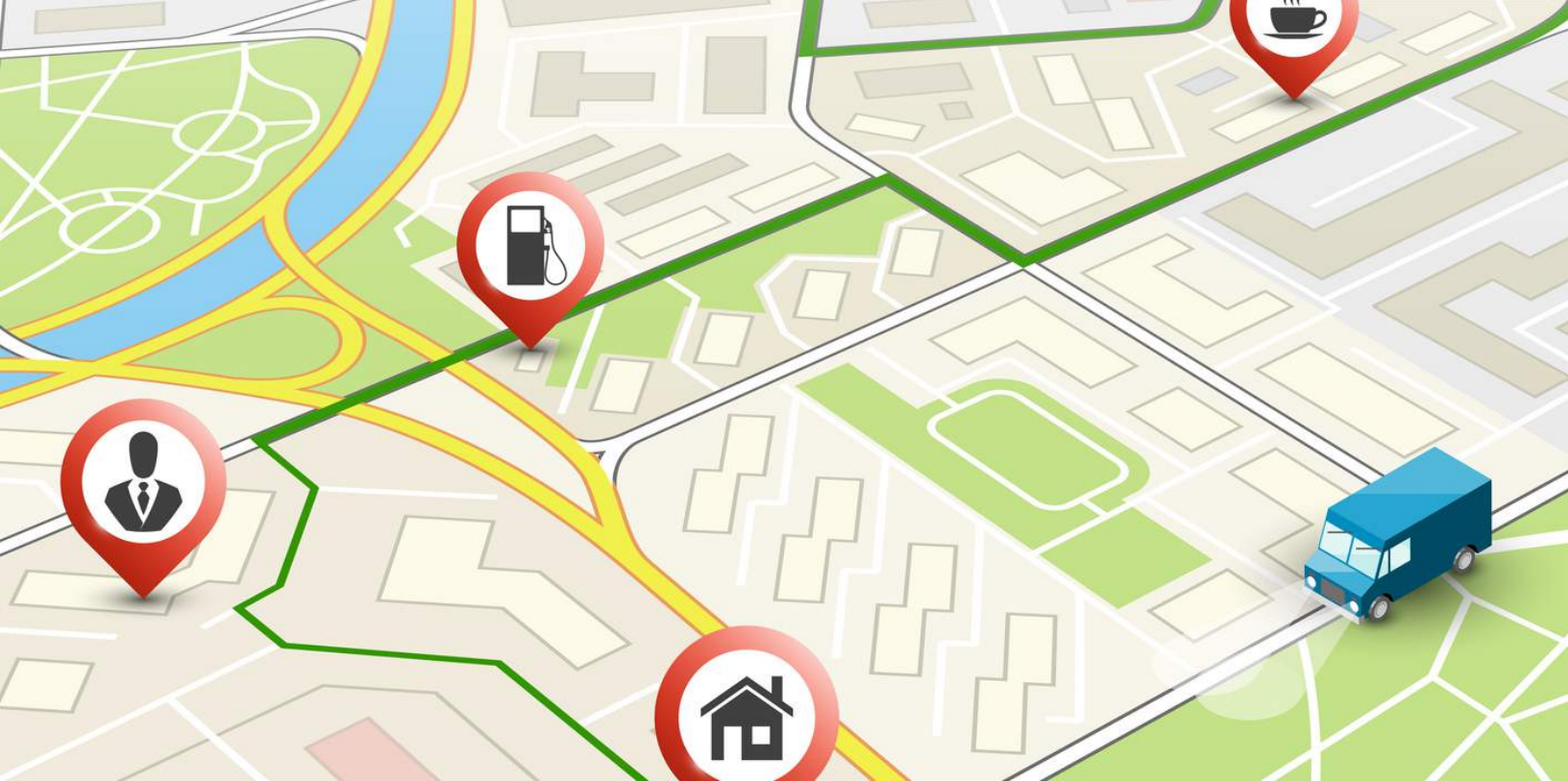
1 **ELIMINATION OF MANUAL PROCESSES**

Manual processes and paper forms are a recipe for inefficiency. They slow down the pace of business and have the potential to negatively impact the bottom line.

Mobile field operation software offers a number of benefits including digitizing of forms and work orders, tracking time and materials, and streamlined communications.

Digital forms and reports - Save time, reduce errors, increase transparency, and ensure regulatory compliance.

Track time and materials consumed - Ensure field operatives' time and materials are accounted for at all times.

Streamline communications - Ensure relevant information is communicated to individual field operatives or broadcast updates to all field operatives. Share real-time updates of job status with customers.

2 IMPROVED SCHEDULING

Getting the right person to the right place with the right tools is imperative for field operations to be successful. A digital Planning Board, a corresponding map and a project overview provides resource planners with access to all of the information they need in one place.

Digital scheduling - Eliminate paper, whiteboards, and trips to the office by making schedules easily accessible digitally.

Complete overview - Provide resource planners with a complete overview of scheduled jobs and resources to ensure optimization. Allow project managers to drill down into the plan to identify tasks running over budget or deadlines.

Communicate with technicians and customers - Easily communicate and log important information with customers and field operatives through the software.

View status - Resource planners can quickly view job status which reduces double booking and enables them to keep customers up to date.

3 RESOURCE OPTIMIZATION

Time is money! A comprehensive field service solution ensures resource planners receive real-time updates from the field. This allows for real-time visualization of key parameters for resource allocation, such as job completion status, estimated travel time, sickness, holidays, skills, geo-position, and more.

Not only can resource planners easily plan and assign jobs to field operatives, they can track time, materials and other resources. They can communicate with both the customer and service operatives using SMS, email or phone.

Single source of information - Planning board provides access to all of the information a resource planner needs in one place.

Easily message field operatives - Message operatives directly from planning board to share important updates.

Track operatives locations - Built-in mapping capabilities enable resource planners to plan an operatives next job based on proximity.

Manage work orders - Easily create and search work orders directly from planning board.

4 IMPROVING YOUR FIRST TIME FIX RATES

Ensure field operatives are properly prepared for each job and able to work online and offlne. Enable them to view all of the information they need from their mobile device, including:
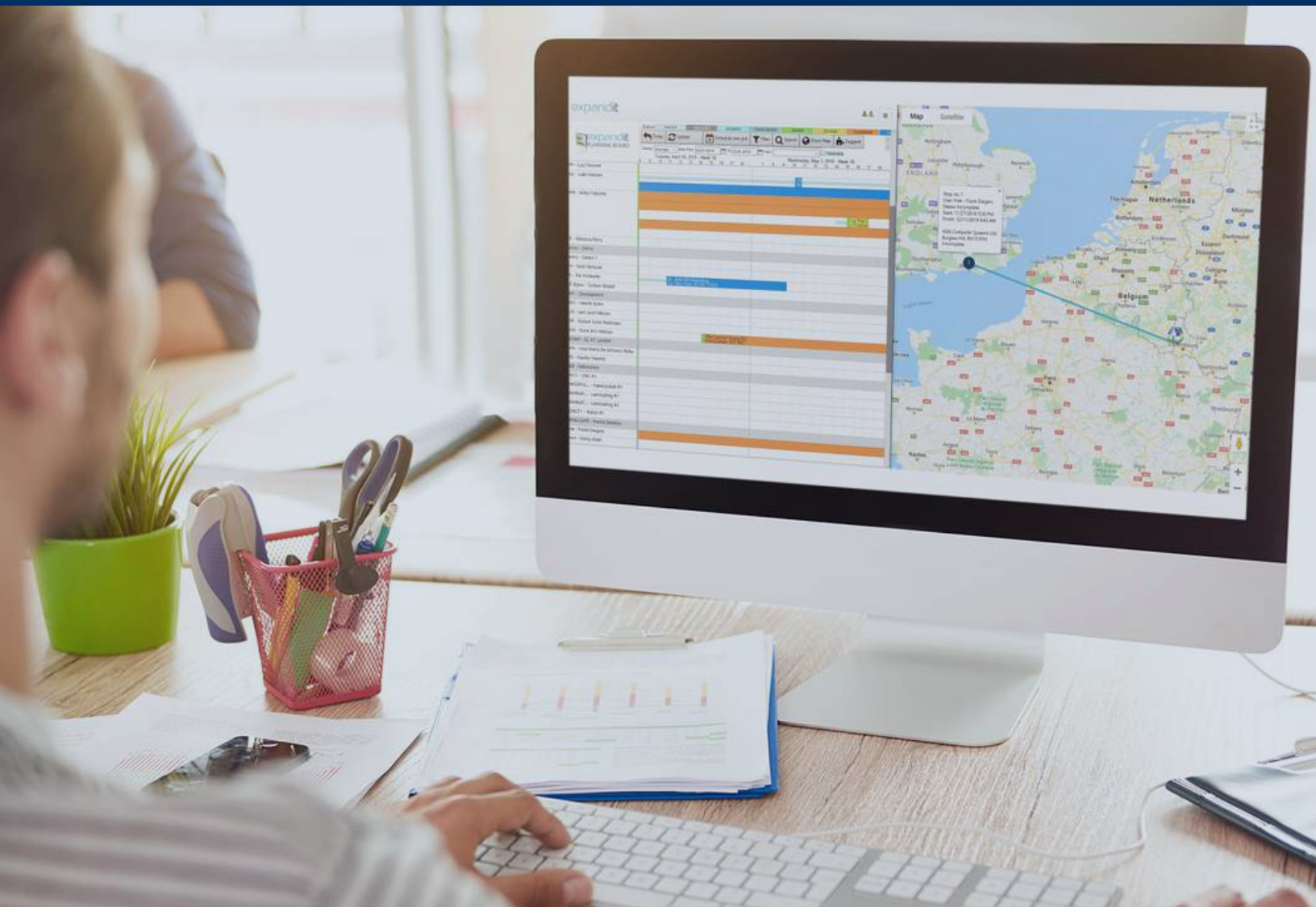
- Time card
- General messages from office
- Any forms
- Schedule
- And much more

Calendar - View all jobs assigned by day, week, and month.

Jobs - View scheduled time, address, messages from resource planner, attachments, accept/decline job, start job, and send messages.

Time and materials - Create timeline, add additional crew members, record information on one or multiple devices, locate and view all inventory.

Forms - Capture compliance information, document job done, upload external forms, and capture operative and customer signatures.

ONLINE PAYMENTS ELIMINATE DELAYS

5 FASTER INVOICING

Manual processes eat up tons of time and have a significant impact on your profit margins. Every day you wait for information to come in from the field about work performed affects cash flow and profits negatively. If sending invoices out takes weeks after a job is completed it is time to find a better way.

Customers expect to use modern, on-demand technology that enables them to self-serve. A service portal provides a solution.

Self service portal - Eliminate the wait for invoices to be mailed with online access.

Pay invoices online - Customers can easily pay invoices online, saving the company time and money.

Ensure accurate invoicing - Manager approvals eliminate errors, leading to prompt payment and improved cash flow

KEY CONSIDERATIONS WHEN LOOKING FOR A SOLUTION

When looking for a solution to help you manage your business there are a number of important considerations. These include:

- **Cloud vs on premise** - A web based solution provides a number of advantages including reduced overhead, security, scalability, and more.

- **Company or personal mobile devices** - Many organizations have a BYOD (Bring Your Own Device) policy. It is important to consider if you want your field operatives using their own mobile device or one that is set up by your IT department. If they are using their own device you need to consider data security.

- **IOS/Android/Windows** - If your field operatives are using their own device it will be impossible standardize on one platform. For corporate devices there could be a learning curve for users unfamiliar with the platform your select.

- **Offline access** - With operatives in the field internet access is not always possible. You need to ensure your field service solution provides both offline and online access. This ensures important information is captured in the field and synced to the system when mobile access is available.

- **Training** - Classroom training for field operatives in the field isn't practical. You need a solution that provides easy access to how-to videos, virtual training and a knowledge base. This enables users to train at their convenience and access help information as needed.

EXPANDIT SOFTWARE
WILL HELP YOUR BUSINESS

✓ **CUSTOMER SERVICE**

✓ **COMPETITIVENESS**

✓ **WORK PROCESSES**

✓ **INNOVATION**

CONTACT US TODAY TO FIND OUT HOW EXPANDIT CAN HELP YOUR BUSINESS!

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