

WHITE PAPER

# Avoiding the common workflow pitfalls in field service

It is very easy to say that field service operations should run more smoothly, it's far harder to say how - and even harder to make it happen. This whitepaper identifies the most common pitfalls and highlights strategies to both identify weaknesses and make improvements.



## Introduction

We all understand the need to work as cost effectively and productively as possible and operational workflows are an essential element in this mission. In fact, they should be seen as the core element of a service organisation - without streamlined workflows an organisation cannot achieve service excellence and without delivering an outstanding customer experience the growth and success of that organisation will be restricted.

Understanding the need to rationalise workflows is the starting point. It is very easy to say that field service operations should run more smoothly, it's far harder to say how - and even harder to make it happen.

This whitepaper identifies the most common pitfalls found in field service workflows and highlights strategies to both identify weaknesses and make improvements.

## Situation overview

Historically, field service units have been decentralised. Often run as mini or district geographic businesses with little oversight for head office.

service needs! This makes it extremely difficult for these organisations to fully assess the effectiveness of their field service due to inconsistent, and often poor data quality.

Meanwhile, the organisations who have centralised their processes and introduced technology to their field service management are faced with problems of their own.

Despite having greater visibility of their operations, many are still failing to fully understand how efficient their field service is. Research found that 35% of organisations have not conducted a field service process review in the previous 12 months<sup>2</sup>. This may in part be due to a lack of skills and confidence - a McKinsey study found that only 18% of companies believe they have the skills necessary to gather and use insights effectively.

*"35% of organisations have not conducted a field service process review in the previous 12 months."*

Technological developments have meant that organisations could break this siloed way of working and once again bring everyone together to work towards a single goal. But such a transition has an impact on many aspects of a business and has therefore held some organisations back. In fact, 54% of those exploring technology-driven field management are still reliant on paper, whiteboards or other manual methods such as Excel and Quickbooks to handle all of their field



Aside from this, the research went on to find that of the 65% of organisations which have conducted a field service process review in the previous 12 months, only 27% indicated that they did so while keeping an eye on revenue objectives<sup>3</sup>. This disconnect between organisational goals and operational objectives makes it very difficult to conclude what actionable steps need to be taken to improve business performance.

No matter how workflows operate - whether paper based, using a spreadsheet, or driven by technology - they are the catalyst of every organisation. A lack of regular reviews, or overall inability to evaluate the workflows is likely to compromise efficiency, customer experience and profitability.

**Ineffective workflows are costly**

38% of organisations indicate that they can save 30 or more minutes per day per technician with a basic change in process. Perhaps more importantly, taking an average service organisation, this could lead to an average **annual saving of £525,000**.

Source: The Service Council

## The 10 most common workflow pitfalls

The average service organisation has multiple workflows coordinating numerous stakeholders, with the single goal of delivering the best service possible. Take figure 1 as an example: this is a single, relatively straight-forward process for handling a reactive call and yet multiple issues could occur at every point.

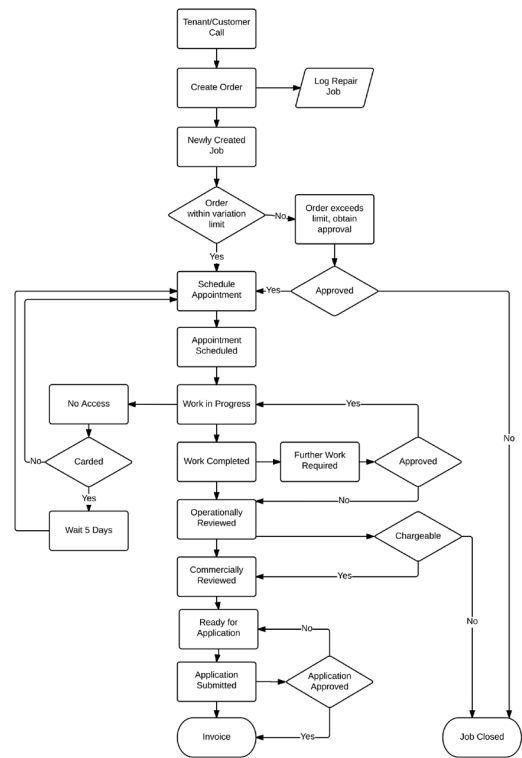


Figure 1: A standard field service workflow

This diagram exposes the complexity field service organisations are faced with and demonstrates the multitude of scenarios which must be considered before workflow rationalisation can begin.



Below are the 10 most common workflow pitfalls for which every service organisation should have a solution.

**1 Ineffective job diagnosis**

Inaccurate or incomplete diagnosis at the point of the initial call has ongoing implications. It can restrict an engineer's ability to complete a job and damage the customer experience, the costs of which quickly accumulate.

**2 Inaccurate/incomplete job data**

Closely linked to the first point, data is everything. If an engineer arrives at a job but cannot access the job history, their task of resolving the issue is made that much more difficult.

**3 Misaligned schedules**

Inefficient field service scheduling is not only the cause of the greatest frustration within a service team, it can also be very costly. The most common issue is allocating an engineer who doesn't have the skillset or parts necessary to complete the job.

**4 Wasted or prolonged visits**

Aberdeen research shows that the number one reason why customers were unhappy with service was that the technician did not resolve the issue. First time, or worse yet, second and third time fix continue to be major challenges for field service organisations.

**5 Inaccurate demand forecasts**

In order to retain valuable customers, service organisations must ensure their customers receive the service they desire, but delivered in the most cost effective way. Navigating this complex equation by maintaining the right balance of available service resources to meet fluctuating customer demand is extremely difficult.

**6 Inability to reschedule**

Traffic jams, sickness and customer cancellations are all inevitable glitches, but if your scheduling team learn of these issues secondhand, rescheduling delays are inevitable and in some case, it may not be possible to reschedule. Valuable time will subsequently be lost and profit margins diminished.

**7 Communication failures**

The entire nature of a mobile workforce presents a communication obstacle. From job scheduling to communicating with other departments and partners, there is a long chain of events that require fluidity if you are to achieve the most efficient operation possible.

**8 Fluctuating stock levels**

To maintain a healthy cashflow it is important not to tie up cash unnecessarily in stock, but not enough stock will inhibit the workforce from completing jobs quickly. This balancing act proves extremely difficult for many service organisations.

**9 Lost work orders and invoices**

A concerning issue but one that is surprisingly common. An engineer completes a job but there is a delay in informing head office of the details. As a result, they are unable to invoice for the job.

**10 No audit trail**

Whether meeting compliance regulations or reviewing performance, a lack of historical data can severely hamper the success of a service organisation.



## Guide to identifying workflow pitfalls

Visibility is the underlying theme when identifying workflow improvements. It's the golden ticket that will allow organisations to gather information, identify issues, pinpoint opportunities, instigate change and monitor ongoing performance. To achieve complete visibility, service organisations need to carry out the following actions:

### Action #1 - Identify the first time fix rate

Worryingly, 17% of organisations are unaware of their first time fix rate<sup>4</sup>. The first time fix rate tells a detailed story. Once an organisation knows how many jobs have required repeat visits, it can start to explore the reasons for those visits, whether the part was unavailable, the technician didn't have the necessary skills, there was insufficient time to complete the job or another reason. Once these are understood the workflows can be corrected accordingly.

### Action #2 - Establish the utilisation rate

Engineers are the greatest asset of every service organisation. But an overworked engineer will result in a poor customer service, while an underworked engineer will become very costly. To put this into context, for a service organisation with an average hourly rate of £25, the financial cost of 30 minutes of wasted time a day is £2,900 per engineer, per annum.

To counteract this issue, service organisations must monitor and record details of all jobs to analyse trends and establish the optimal scheduling amount. By continually analysing these key metrics organisation will minimise downtime and maximise utilisation.

### Action #3 - Speak to the customer

Good old fashioned customer research should not be forgotten in our world of data analysis and equations. That said, technology can help to gather feedback. For example, organisations which use service management software benefit from survey functionality - once a job is completed the customer can fill in a satisfaction survey on the technician's mobile device. This feedback is displayed in real-time giving immediate insight into company performance.

### Action #4 - Talk to your front-line team

Your workforce sees the greatest impact of ineffective workflows and yet so many organisations forget to talk to them during a workflow review. They will quickly air frustrations and point out any clunky processes. They are also likely to have customer feedback which they may not previously have mentioned.

Whilst speaking to the workforce it is also a perfect opportunity for organisations to explain the purpose of the workflow review and to prepare them for possible changes. Resistance to change is a natural reaction so the earlier a workforce knows and understands the purpose, the more likely they are to adopt the new processes.



## The importance of continual review

To remain competitive, service organisations need to ensure their workflows are permanently streamlined. As we've already highlighted, the cost of a delay or gap in productivity can quickly accumulate. When this cost can be avoided, it seems foolish not to continually monitor workflows.

## How to prevent workflow pitfalls

There are a number of best practices that have helped top performing organisation maintain optimum workflows.

- 1 Best practice #1 - Better triage
- 2 Best practice #2 - Better equip technicians
- 3 Best practice #3 - Communicate with customers
- 4 Best practice #4 - Carry out detailed analysis

### Best practice #1 - Better triage

One of the most common mistakes organisations make is to schedule the closest technician to a job. Although this may ensure a speedy response, it often results in return visits as the assigned technician doesn't have the skillset required

to resolve the issue. By better diagnosing when the job is first raised, organisations get a detailed understanding of what is required and can subsequently assign the nearest engineer with the right skills.

With the help of field service management technology, this process can be made even easier through intelligent scheduling. The software will take skill level into account and schedule the job accordingly, saving admin staff significant time.

### Best practice #2 - Better equip technicians

The most common reason a job cannot be completed first time is because the engineer does not have the right part, and yet only 36% of organisations have access to part information<sup>5</sup>. Technicians and office staff alike must have visibility of a parts inventory in real-time, to enable engineers to stock their vans and admin staff to replenish stock levels in the most efficient manner possible.

Organisations must also remember the human aspect of field service. Although technology can be highly effective in optimising workflows, some frontline staff can find it suffocating. Employees can witness rigidity making them feel robotic and subsequently disengaged. For example, an organisation may dynamically schedule an engineer's day but the inflexibility of this form of scheduling means it is unable to take individual circumstances into account. As a result, engineers are restricted to completing the task in the specific time slot assigned to



them. Instead, organisations need to select software which offers flexibility - a system that offers the best of both worlds - in which scheduling is automated but can be overridden in certain circumstances. This allows field service personnel to make critical decisions themselves in order to move on to the next task expeditiously.

### Best practice #3 - Communicate with customers

Improving customer communication will always be an essential element to any service delivery. Today, customers expect choice - whether that is the form in which they communicate (i.e. emails, SMS, the internet), or the appointment time. The more flexible an organisation can be to meet the individual needs of their customers, the better.

The basics must also be maintained, for example, a technician arriving when they say they will. These are basic requirements, but can be very difficult to maintain. A simple traffic delay will have an impact on an entire day's schedule for example. Technology such as intelligent scheduling and automated communications can help to ease this requirement.

### Best practice #4 - Carry out detailed analysis

The amount of data an organisation has available is quickly growing. But it is often fragmented and organisations can lack the necessary skills to effectively collate, manipulate and analyse the data, inhibiting the ability to improve. The extent to which

an organisation analyses its workflow data needs to extend from identifying the cost and profitability of each job, to identify patterns in service demand in order to preempt future requirements.

### Best practice #5 - Take advantage of technology

Humans are good, but in many instances technology is better. Combine the two and you have a powerful service delivery force. Technology such as field service management software will automate procedures, provide access to real-time information and deliver detailed reports on performance in a far more efficient manner than humans can achieve alone. In a competitive world, the use of technology to deliver a service can be the difference between success and failure. But as we've already highlighted, organisations must carefully consider the software they choose to ensure it closely meets their needs and does not have a negative impact on any aspect of their service delivery.



## Conclusion

The field service industry is complex. No other industry sees such a direct link between the level of service delivered and customer retention. Once this concept is put in financial terms it quickly becomes evident how critical customer service is to business growth - a 10% increase in customer retention levels result in a 30% increase in the value of the company<sup>6</sup>.

Without streamlined and structured workflows organisations cannot achieve an optimal service experience. Getting to full potential involves a detailed breakdown of the various components of field service operations to see how efficient they really are. Through greater visibility organisations can then make adjustments and hone their workflows to create a joined up and highly efficient service operation.

If this service delivery is to exceed that of others in the same industry it must incorporate technology. Technology is now central to transforming the way a company delivers, satisfies and hopefully exceeds customer expectations and it's capabilities must not be overlooked.

### Sources

<sup>1</sup>Software Advice

<sup>2</sup>Service Council - Field Service Update: Reviewing business priorities

<sup>3</sup>Service Council - Field Service Update: Reviewing business priorities

<sup>4</sup> Aberdeen Group - Workforce Management Guide

<sup>5</sup> Aberdeen Group - Field Service Report

<sup>6</sup> Bain & Company





## BEST PRACTICE CASE STUDY: How Sky Network Services optimised their workflows



Sky Network Services (SNS) are responsible for implementing, maintaining and upgrading the networks that support Sky's vast domestic broadband and talk services. Covering thousands of miles a week, Sky needed to ensure that the right engineer was allocated to the right place at the right time. They wanted a dynamic system which would identify the optimum job schedule based on engineer skill matrix, geographical location, duration of job and priority.

### Working together to achieve a single goal

Oneserve worked with Sky to identify their challenges and develop the best solution for them. We analysed Sky's existing workflows around scheduling their engineers and looked at the functionality they required. After the consultation we ran a pilot to identify areas of improvement, and worked with the team to adapt our software to their requirements. We helped them to implement:



Advanced appointment scheduling to plan and manage their mobile workforce.



A more effective asset management system to manage an extensive list of assets and allow planned and reactive maintenance.



Real-time analytics that enable benchmarking of critical KPIs to track performance and predict future trends.

*'We needed a tool in place that would address scheduling issues and improve efficiencies. Oneserve schedules the right engineer for the job with the necessary materials and skills, allowing the engineer to complete the job first time.'*

*The reports created from the Oneserve analytics tool allow us to manage our resource in a smarter way by improved measurement of planned versus actual times to complete activities. This has enabled us to be much better at planning our engineers' work, increase productivity and produce cost savings.'*

James O'Rourke, Project Manager, Sky Network Services



# About Oneserve

Oneserve offers a market leading, cost effective mobile workforce management solution. The solution is simple to configure, intuitive to use and designed around the customer, helping them to optimise workflows and boost workforce productivity. It enables the user to schedule employees and jobs, manage stock, and fully integrates with financial systems such as Sage.

Oneserve clients operate in a variety of sectors including social housing, facilities & property management and telecommunications.

To find out more, please give us a call on 01392 367 367 or visit our website [www.oneserve.co.uk](http://www.oneserve.co.uk)

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