MAKING THE CASE FOR DIGITISING JOB MANAGEMENT

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Making the case for digitising job management when you're not a tech powerhouse

Digital transformation and disruption is all around us.

We live in a time where the world's largest taxi company owns no taxis (Uber), the world's largest movie house owns no cinemas (Netflix), and the largest software vendors don't write most of the apps they sell (Apple and Google).

Organisations of all sizes are transforming their processes and for many the journey is just beginning. Recent world events mean many are starting their journey more quickly than they originally planned.

The question is, how do you start when you're not Google? And more specifically, what are the benefits of digital transformation when your employees complete jobs away from the office, workshop or yard?

Jobs that take your employees on site with customers at warehouses, ports, homes and building sites each day, are still a part of the digital transformation journey, you just focus on transforming different things.

Regardless of the industry you're in, there's a lot that needs to get done over the course of any given day. Part of what makes this particularly time-consuming is that often there are a lot of manual tasks, and the problem with those tasks is that not only do they eat up a lot of time that could be spent doing more high-value tasks that help your business grow, but they also introduce room for human error.

It's these tasks that businesses focus on when introducing digital solutions to increase productivity by removing low-value tasks like attaching PDFs to emails to send invoices.

It's tempting to start small and introduce automations that remove one or two tasks from your plate. The problem though is that if you use a piecemeal approach with a solution that does job scheduling and another that does time tracking, and yet another that handles health and safety, you're not really streamlining anything. You still have to log into each platform separately to do the tasks, or figure out a way to get them to communicate with each other.

The best approach you can take is to find a single system that truly streamlines your job management processes to make your job easier.

1 What you need to consider when streamlining your processes

The longer you're in business, the more obvious it becomes that processes make your life easier. Once you figure out which processes work best for your business, the next step is to streamline the processes themselves, making them even more efficient. Even a few minor tweaks to how you work can lead to huge improvements in productivity.

Automate what you can

Automation is often seen as the thing that's coming for all our jobs, but the reality is that it's great for removing a lot of the repetitive tasks that make up our day. McKinsey reports that for about 60% of jobs out there, as much as 30% of the tasks can be automated. This doesn't mean that 30% isn't important, but rather that these tasks don't need a human to take care of them. This is where automated workflows come into the picture. Pre-set automated workflows make it possible to automatically move through a series of tasks related to a job.

In practice, a customer can contact you to schedule a job, and you then enter it into the system and assign someone to take care of the job. The system then alerts the employee of the job, lets them know when it's scheduled, and can provide them with a list of the equipment and parts they will need to complete the job. When a job is marked as complete in the system, an invoice is sent off to the customer.

Outside of entering some specifics around the job - like how long it took and what materials or resources you used - everything happens with just a few clicks. You remove the need for employees to sit down and fill out paperwork, and you remove the delay in sending off an invoice by not having to return to the business to pass the details off to someone else. You can even make it easy for the customer to pay on the spot. Best of all, you remove a lot of potential for human error from the process by removing the need to manually enter information like payment details.

Even scenarios that might not come up very often, like demurrage, can be managed this way. Not only can missed delivery slots be noted by the customer, but if a driver arrives on site and the site isn't ready, that can also be captured. Taking this one step further, if a job is time stamped (like arrived on site and unloaded on site), and there is a long delay between timestamps, then that should flag a revenue opportunity (contract dependent).

With the right setup, these workflows can be pre-set for every job type, meaning you have automated processes in place for every facet of your business.

It's possible to reduce seemingly simple tasks, like dispatching, by up to 60% using job scheduling and dispatch software, freeing up your staff to spend more time connecting with customers, or helping grow your business.

Remove double entry

Double entry can be a point where human error rears its ugly head, largely because the more times you need to enter a piece of information, the higher the risk of it being done incorrectly.

Invoicing can be a good example of where this happens. Say you've got a system that helps with invoicing, but not that captures job details. If employees are manually filling out forms with all the relevant information related to the job, and then handing that off to someone in the office, that handoff is a source of potential error. That's because not only do they have to be able to make sense of what's been written down, but the person in the office wasn't the person in the field and therefore has no first-hand knowledge of what took place.

And even if you have a system that captures invoicing information, if it doesn't talk with the system you use (like when information gets sent back the office via email) you still have to input everything in.

Regardless of the exact process, there are multiple steps involved in getting an invoice out the door, which cuts into time that could be better spent doing other tasks or getting to another job.

The ideal system is one where job details are entered into the system from the field, the invoice is generated automatically based on the information provided and then sent off. The task is done only once, saving time and removing the possibility of error from the process.

Build a complete picture

The beautiful thing about digital transformation efforts is that it gives you access to a ton of data. This data provides a lot of insight into your operation and helps you make highly informed decisions based on what's actually going on in your business. And thanks to the tools that are available on the market, you can gain access to this data in real-time.

This works best when your employees have access to the job management tool on their phone or a tablet that they use on the job, as it helps you to not only communicate more effectively with them, but it also means you're collecting data from the field.
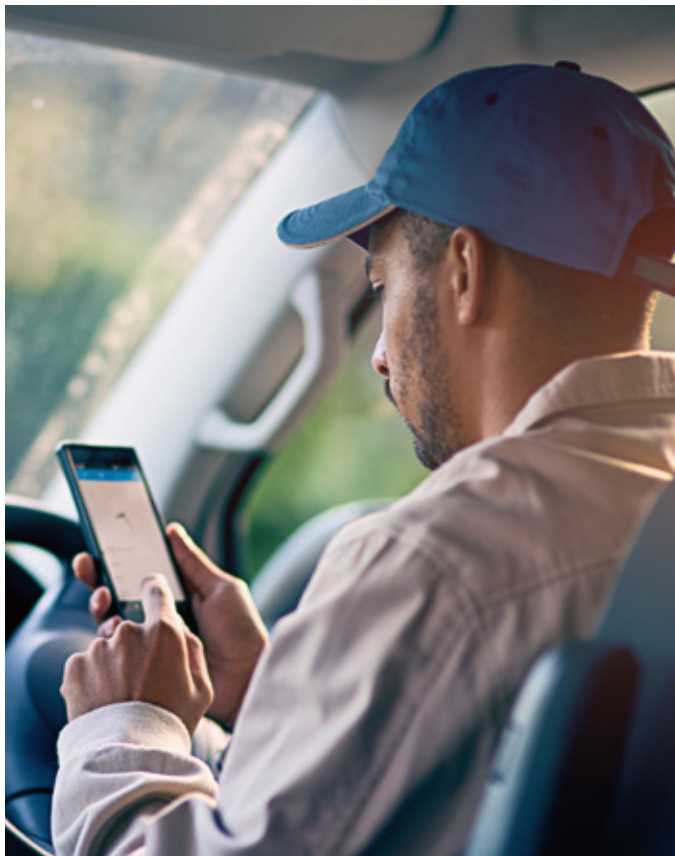
What this means is that you have an up-to-the-minute view of your business, and the more data you acquire, the better that picture is. It's details like:

- **Which types of jobs are the most and least profitable for your company.** This tells what kind of work you should be focusing on and what types of jobs are probably best to pass on in the future.

- **Which employees are best suited for which jobs.** Everybody has their strengths, and with the right data, you can figure out what this is for each of your employees. That means that they can focus on the work they do best and not on the tasks they don't excel at (making customers happy as well).

- **Exactly what is needed for each job.** When you produce detailed invoices that get logged into your system, you start to notice patterns of what technicians are using for each job. This lets you send out employees with everything they need for specific jobs and lets you track the special requirements or requests that some customers have.

- **What inventory you need.** Along with knowing what inventory is needed for each job, you also know what you use the most and least of. This gives you the ability to stock more of items you use a lot of, and less of the things you don't. You'll also know when it's time to bring in seasonal inventory that only moves at certain times of the year.

All of this data lets you streamline your business and make better decisions that ultimately make your customers happier.

Leverage real-time data to manage exceptions

This real-time information your business produces can also be extremely useful when trying to navigate situations where things don't quite go as planned.

When everyone is operating inside a job management tool, you can quickly identify exceptions as they arise and work to proactively manage the situation when data becomes available. It helps you stay informed and allows you to create systems for dealing with these situations should they arise again.

In the real world, say you have an agreement to finish a job by the end of the day. The job takes, on average, two hours. If something happens at a job earlier in the day that sets employees back, you get the alert and make a decision about whether the technician finishes the earlier job, or moves onto the next one. Since the data is real-time, you also know if there is anyone who is done early who could help the technicians who are running behind.

This can also be useful in situations where you need to be able to make it from point A to point B in a certain amount of time. Traffic can get in the way of being able to move efficiently through a city, which can impact your ability to complete the job. Rather than dedicating time to planning out delivery routes each day, you have a system that allows you to optimize delivery routes based on details, distance and vehicle clearance. It saves you time (our customers have reported saving up to two hours a day per driver) by not having to sit around and figure out the best route on your own.

And, it's possible for your customers to know when they can expect delivery. Customers can get updates either via text or email that tells them they have an expected delivery coming up the day before. And then, on the day of delivery, they can get follow up alerts based on their location (when your delivery is 30 minutes away) or when the driver has completed the delivery prior to yours.

Being able to proactively manage the situation before it becomes a problem helps you keep customers happy by providing solutions when things don't go as planned, rather than apologies.

2 Improve visibility

As mentioned, when you have a system that allows you to see all the data that's being generated by your company, you have a better understanding of everything that's happening. Not only does this give you the ability to make better decisions, but it also helps you create more efficient workflows to help you manage situations as they arise, even ones that don't come up very often.

This visibility helps you stay on top of tasks that you may only deal with once or twice a year. And, they make it easy to keep your customers happy and meet any compliance requirements.

Easily report on exceptions as they happen

We talked a little bit about keeping customers informed about delays in the previous section, but you can actually take this a few steps further to help you manage any and all kinds of exceptions or incidents that might happen on the job. You can even go as far as to create automated workflows that help ensure nothing gets missed as part of the process.

For example, you've got an employee who gets injured on the job. When the incident occurs, you log an alert into your job management system so that everyone knows what's going on.

Once the incident is logged, an alert is sent to all relevant parties (i.e., health and safety manager, director, and/or CEO), and the system can then send out all the forms that need to be filled out for the incident, plus notify the customer (if necessary).

This isn't just limited to injuries either. If there are other health and safety violations, like unsafe worksites, those can be handled too. The same goes for jobs where the scope on-site is different from the work order, or if something happens on-site that impacts the ability to complete a job, like a pipe bursts or a piece of equipment malfunctions.

Each type of scenario can be planned for in advance and automations can be set up to help notify everyone, and help ensure that proper protocol for dealing with the situations has been followed. There will still be incidents that arise that aren't in the system, but with the right planning, they will be few and far between.

Pre-empt SLA failures

Similar to getting ahead of exceptions is the potential to manage when things go sideways on a job.

Unfortunately, service level agreement disputes are a part of doing business. A good digital job management tool can help you prevent disputes before they become problematic.

One way to pre-empt these failures is to have employees take photos of jobs once they have been completed and attach these to either the invoice or the completed work order. If a customer comes back and says that Task X wasn't completed, you have photographic evidence on file that it was or an ePOD (signatures recorded via sign-on-glass and time-stamped) on hand.

It doesn't prevent customers from complaining, but it gives you a way to show that the task was completed. It might be that it wasn't done to the standards the customer expected – but in those situations, you would of course be happy to send someone out to touch it up, all of which would be logged and tracked for later reporting.

You end up doing a bit more work, but you're able to provide a solution that helps your customers feel heard, while proving that you did do the job as requested.

Discover bottlenecks in your processes

This is where things get really exciting! When you have access to all the data that your business produces in one place, you know exactly what's going on at any given moment.

You'll know details like how long a job takes on average and what materials you'll need. Most importantly though, you'll know exactly where the bottlenecks in your processes are.

That's those moments when everything has to slow down because you have to switch between programmes to complete a related task or something completely unrelated like contacting employees on one job to let them know another job has been delayed or cancelled. Or, when tasks like invoicing build up because you don't have time to deal with them.

Ultimately, they're tasks that take you out of the flow and slow business down. Being able to identify these situations can help you create processes that let you work more efficiently and increase your productivity.

3 Automate routine tasks

More often than not, when you identify bottlenecks in your system, you see that they're tasks that have to be taken care of manually. With a solid job management system, these bottlenecks and other routine tasks become a thing of the past, leaving you to focus on tasks that help to grow your business, like finding new customers and expanding operations.

Automate your entire process, from data capture to close-out packages

Being able to create a fully automated process removes a lot of unnecessary work from your day-to-day operations.

To make this as seamless as possible, you need to have a complete system that handles all the various touchpoints of your process. The specifics of the automated workflow are going to be different depending on your industry, but the general idea is going to look something like the following:

When a customer reaches out about a job, one of two things can happen: you either take the information they provide and enter it into the system or, if you have a customer portal, they can enter the information themselves.

Once the information about the job is captured, a ticket is created in the system and an employee is assigned to take care of the job. The customer is then notified with all relevant and scheduling information about the job. And when the job is completed, more relevant information is entered and an invoice is automatically generated and sent off to the customer.

All this automation - such as sending invoices, and scheduling an employee to do the job and any follow-up work - reduces the amount of manual work that needs to be done down to almost nothing.

But the real magic happens when the increased accuracy of the data capture leads to a boost in revenue.

Our customers have reported a 10% increase in revenue thanks to a more accurate data capture, which has occurred because the potential of human error has been removed from the process.

Best of all, if you're doing work with recurring customers and they need your services every two weeks for example, you can automatically book this into the system in advance with all the specifics of the job, right down to the customer's preferred employee.

4 Increase operational agility

One of the bigger advantages to digital transformation and job management tools is that you end up with a higher level of operational agility. Having that greater level of visibility and capturing data puts you in a position to reduce the number of repetitive tasks that you have to take care of and it puts you in a position to better serve your customers.

As much as it would be great to have everything happen within a single system, sometimes that's just not possible. When you're picking out a job management system to help with your business, you should also be looking for something that integrates seamlessly with the software that you're already using (like your CRM, accounting package, or email marketing tools) because the more everything can communicate with each other, the more seamless it will be.

If you're using a tool that doesn't integrate, you end up with a couple of possible scenarios - you're either manually inputting everything from one place to another, or you're creating workarounds that aren't as efficient as they could be. Regardless of how, you'll be creating more unnecessary work for yourself, as well as introducing areas where human error can affect your business.

Beyond just allowing you to work smarter, it helps you see new opportunities for your company to thrive.

As you collect data, these opportunities become more obvious, especially if you have customers who are repeatedly asking for certain services or products. Of course, you might eventually identify these requests without a system in place that collects data, but it happens faster with one, which puts you in a position to outpace your competition.

It also makes it possible to adapt on the fly as things change like, for example, you suddenly need to adjust aspects of your business model due to a global pandemic.

Ready to embrace digital transformation of mobile jobs?

The good news is that getting started with digital transformation and implementing a mobile job management solution isn't as hard as you'd think.

With a single platform like vWork, you can bring all your processes together in one tool that helps you automate, streamline, and digitise your business processes based on real-time data collected from the field.

Plus, it will fit in exactly with how you run your business – no need to pay for expensive developers or change your processes to fit in with the solution.

It puts you in a position to save money by removing repetitive tasks, serve your customers better by keeping them more informed and providing a higher level of service, and ultimately putting your business in a place to make better decisions about growth and profitability.

What's next

If you want to find out how you can help your business, then let's talk. We help customers in 10 countries dispatch and manage over 350,000 jobs a month. So, book in your demo today and let's start talking about how we can help you increase productivity and grow revenue in your business.

vWork