What to Do When Everyone (or No One) Is Right for the Job
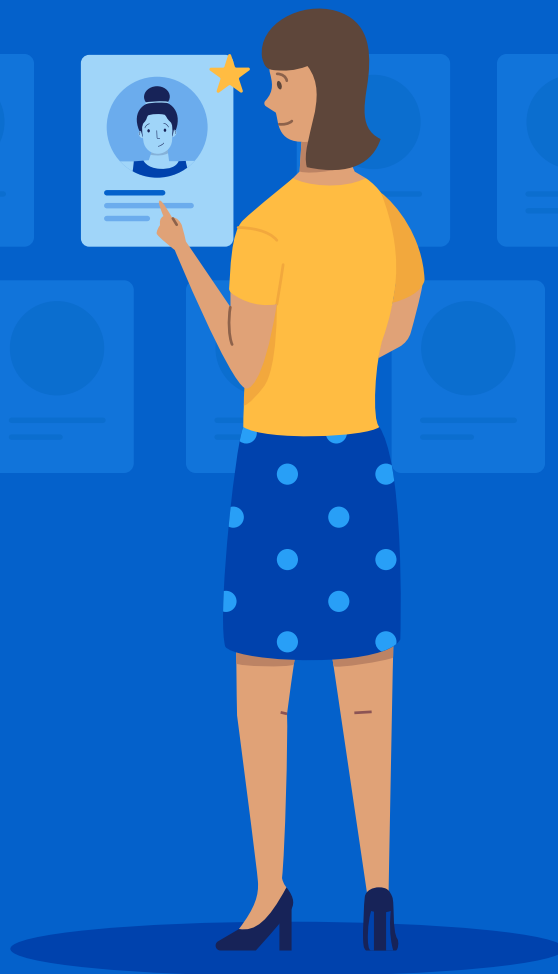
Contents

Introduction

Managers of mobile teams are constantly juggling multiple priorities, customer demands, and employee needs. Being successful requires knowing who is available at any given time, what type of work they're qualified to do, where they are, and how that matches up with customer requests—which keep coming in at a mile a minute.

So here's the big question: Who is right for the job?

At a base level, "right for the job" means having the requisite skill, equipment, experience, and proximity to the job. But with advanced scheduling tools, "right for the job" can mean so much more: the "right" person can deliver the needed service and help you reach strategic business goals, whether it's cost reduction, customer retention, employee development, employee retention, or something else entirely.

This type of "right" for the job varies not only from business to business, but it can also change over time within a single company. Your priorities can even shift from job to job, depending on the nature of the work.

In this ebook, we'll discuss three common challenges that schedulers run into, and we'll discuss how you can turn these seemingly problematic scenarios into true business opportunities:

- **Everyone is capable of completing the job.** When everyone can do the job, you can make strategic scheduling decisions that serve larger business goals. Think about what you're trying to optimize for (customer retention, employee development, cost reduction, etc.) and implement a scheduling system that helps you prioritize these things, not just find open time slots.

- **Only a few employees are right for the job.** In this situation, there are short-term and long-term needs. In the short-term, schedulers need to identify what skills are needed, who has them, and how to get them to the right job location—all as quickly as possible. In the long-term, think about ways to develop your current employees so more of them can do this type of job in the future.

- **There is no obvious "right" person for the job.** If you don't have the right people in-house for a certain job, start gathering data to see how this staffing gap impacts your business. You might need to engage 1099 contractors, temporary workers, or other groups that have the skills you need, and if that's not an option, schedulers need to be proactive with customers and their managers to close the gap.

Read on to learn more about what to do in each situation and how a mobile workforce management solution can help you make sense of it all.

What to do when everyone is right for the job

It's every manager's dream scenario: A new request comes in, and you have total confidence that every one of your employees could do the job. You send someone to visit the customer and rest easy knowing they will provide great service.

As a manager in this situation, it's tempting to stick with the status quo and let the process continue to work. But in fact, this is when you can accelerate your growth by focusing on larger business goals.

With a capable team and a strong scheduling system, you can schedule employees based on your business priorities:

If your primary goal is cost reduction, try to find the most cost-effective employee for the job, and make sure your tools are designed to help you do it on an ongoing basis. Gather and analyze metrics like travel time between jobs, down time between appointments, average employee distance from the job site, and average time spent on the job to understand the true cost of scheduling decisions. The right mobile workforce management tool can take all of this data into account and assign the most cost-effective employee to the job.

If your primary goal is customer retention, think about how you can delight your customers with the right scheduling decisions. One way to optimize for customer retention is to match up customers with employees who have had positive interactions with them in the past, even if they are not the cheapest or closest option. Reference customer satisfaction scores and positive customer feedback to uncover these patterns, then match it up with a scheduling system that can store or access this data, and assign employees to jobs based on high-quality past interactions. With this information, you can make quick decisions about which employees are best for customer retention and make the customer experience a true competitive advantage.

Case study

ROCKET FIBER ℠

See how mobile workforce management helped Rocket Fiber improve customer satisfaction by 68% with fewer missed appointments, more precise scheduling, and better service delivery.

If your primary goal is employee development or retention, think about how your scheduling decisions impact your workforce and how you can make yourself a more attractive employer. To improve new employee retention, think about ways to give newer employees more experience. To develop your employee base, consider pairing newer employees with seasoned colleagues to learn on the job and improve their skills.

A mobile workforce management system should have the tools to create a better work experience for your field teams by making it simple to accommodate special scheduling requests, assign work that capitalizes on someone's best skills, or help them develop new ones—without disrupting customer service. These type of actions can have enormous impact in keeping employees happy and encouraging retention.

What to do: If everyone is equally qualified to do the job, you have an opportunity to optimize higher-level business goals. Reduced travel time, increased utilization, and efficient routes are just the beginning.

Make a concrete plan to address certain business goals with your employee scheduling processes. This plan should include:

- **The business goal you want to optimize for (and why)**

- **The metrics you will track to measure your progress**

- **Any dependencies or obstacles facing the scheduling system**

- **How your team and your scheduling system will work together to implement the plan**

When everyone is qualified for the job, a mobile workforce management system can help you make complex decisions and meet business goals. By finding the right tool that complements your employees' customer service, you can build on this momentum and improve customer satisfaction, employee engagement, and administrative efficiency.
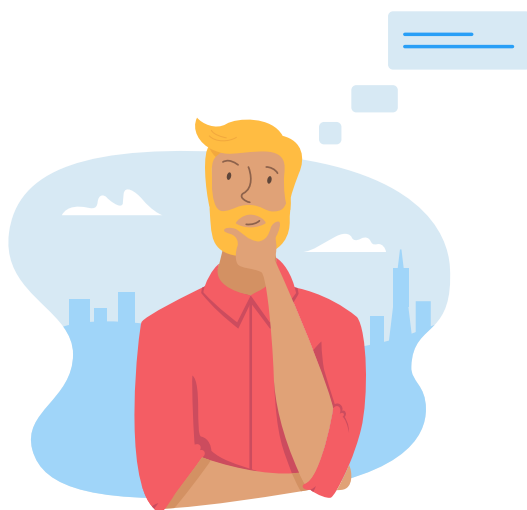
What to do when only a few employees are right for the job

Every workforce has a unique combination of skills, talent, and experience. But unfortunately, many employers do not have the tools to see and analyze the unique skills of their workforce—at least not fast enough to keep up with the daily needs of customers.

For example, consider the scheduling needs of an in-home healthcare provider. On a given day, a manager might receive new appointment requests for:

- A female nurse with experience in neonatal care

- A nurse specializing in geriatric medicine who can perform respiratory therapy

- A female nurse who can speak Korean

- A Certified Pediatric Nurse (CPN) who can speak Spanish

Without [visibility into their workforce](#) and a centralized place to organize all these details, it takes too long to assign work to the right people and it is far too easy to make consequential errors. Take a look at how the scheduling process differs between a manual process and one that leverages mobile workforce management:

Manual scheduling:

1. Ask around (by phone, by email, or in person) to see how many CPNs are on staff.

2. Find out which CPNs speak Spanish.

3. Shift around appointments to fit the new patient into the Spanish-speaking CPN's schedule.

4. Call the patient whose appointment was moved and call the CPN who needs to take the new appointment.

5. Send an updated schedule to everyone whose workday is affected.

Mobile workforce management:

1. Use the workforce management system to filter by "CPN" and "Spanish-speaking."

2. Choose a nurse from the list who has a schedule opening at the appropriate time.

3. Automatically send an appointment confirmation to the customer and an updated schedule to all impacted employees.

What to do: Managers and administrators with a mobile workforce must do two things: understand their workforce, then use tools that build on this understanding. First of all, take inventory of how your customers' needs are represented in your workforce. Make sure you understand whether or not you have coverage for:

- Required skills and qualifications
- Language preferences
- Gender preferences (especially for [healthcare)](#)
- Necessary certifications, licenses, and experience

This kind of analysis—which sets the stage for [demand modeling](#)—will help you understand if these staffing gaps are a short-term issue or a fundamental challenge to your business. Depending on the results of this analysis, you may have a few different options:

- **Engage 1099 contractors or temporary workers:** For occasional staffing needs, it is often more cost-effective to engage temporary workers or contract workers than it is to hire a new group of employees. If you engage temporary workers, make sure you implement a mobile workforce management system that can handle both employees and contractors, while restricting sensitive customer data to employees.

- **Develop your existing staff:** If you need more employees on staff with a particular skill, consider ways to develop your existing teams. Try to pair new workers with longer-tenured employees or employees with a unique skill so they can learn on the job and build their expertise in new areas.

- **Recruit new employees with specific skills:** If you can clearly see you don't have the staffing to cover a certain type of customer request—and that type of request is crucial to your business—it is likely worth the time and money required to recruit new employees.

No matter which path you take, make sure you have a mobile workforce management system that is flexible enough to manage temporary workers, account for employee development needs, and enable you to meet higher-level business needs.

" **I would recommend Skedulo to anybody seeking seamless, easy to use, affordable scheduling, dispatch, and field service solution. We resolved so many problems in our call center ranging from filtering out resources to scheduling appointments based on their skill set, availability and daily, weekly limits."**

– Vokhid A., Salesforce Admin at Solar4America
(See Review on G2 Crowd)

What to do when no one is right for the job

For most managers, this is the nightmare scenario: jobs keep coming in, but no one on staff is the right fit. Whether it's a unique skill set, a special certification, or a rare piece of equipment, no one has it.

For some businesses, this is a long-term issue: the business has grown beyond its initial scope or offers new services that employees aren't prepared to fulfill—and it can make employees feel like the company has outgrown them. But for many businesses, it's a short-term issue that simply highlights a unique need.

Take our home healthcare example again. A request comes in for a Spanish-speaking Certified Pediatric Nurse (CPN), but this time, the manager knows that no one on staff is qualified for this appointment. There are a few ways to handle this staffing issue:

- **Make plans to hire more staff that fits this need.** The manager lays out a plan to hire CPNs and Spanish-speaking nurses. By the time they get approval on the hiring plan, post the jobs, conduct interviews, extend offers, perform background checks, and train the new employees, several weeks, at best, have passed since the initial request.

- **Contract with other agencies and services.** The manager reaches out to a healthcare agency that contracts out CPNs to other home health organizations. They work out a staffing support agreement so the manager can offer Spanish-speaking CPN services certain days every week.

In the long-term, it's best to optimize the workforce to cover all high-volume customer needs. But in reality, not every organization has the budget—or the time to wait—to make this happen. With that in mind, it makes fiscal sense for many companies to engage with contractors that provide unique skills and experience.

In the midst of this difficult situation, an intelligent scheduling system gives you the data you need to quantify the impact of the problem. For example, take an administrator at the healthcare company discussed above. With the right data, she can demonstrate:

- How many patients requested Spanish-speaking CPNs in the last month, quarter, etc.

- How many appointments were canceled or unfulfilled because of our lack of Spanish-speaking CPNs

- The financial impact of those missed appointments

- The potential value of being able to meet this need in the future (i.e. how many more patients could we serve by having Spanish-speaking CPNs on staff)

With the addition of the right data, a complex scheduling problem turns into a compelling business opportunity. Schedulers, administrators, and managers can arm themselves with the data to become problem-solvers and uncover hidden opportunities to grow the business.

What to do: Take a thorough look at your customer requests and the makeup of your workforce. Ask yourself:

- What requests are we getting that we simply can't fulfill?

- Are these niche needs that other customers do not have? Or are these needs representative of something we're missing in the larger market?

If it is a truly niche need, then it's up to you to determine if the ROI is worth it. But if the need represents a larger opportunity in the marketplace, it may be worth contracting with someone who can perform the service on your behalf. This way, you can work to align your long-term staffing plan with these needs while still serving the customers who came to you in the first place.

" **We use Skedulo to enter work orders, gather all the work orders in one system, create jobs, dispatch those jobs, check statuses off all those jobs throughout the day, in real-time. So at any given point in the day, we know how many jobs we have scheduled, how many employees are working, what their status is, how many are completed, and we have access to all those hours and customer data at our fingertips."**

– **Ashish Patel**, Director of Strategic Initiatives at
Area Wide Protective (AWP)

How to optimize the skills and talents of your workforce

Optimizing your business for multiple projects and priorities requires a deep understanding of your workforce. A base level of knowledge about your workforce can make a huge difference (and eventually, you can dive deep into employees' needs and desires to understand what truly makes them tick).

Here are some examples of information to look for:

- **External skills:** third-party certifications, training programs, and special skills

- **Customer service:** customer feedback, customer satisfaction scores, existing relationships with customers, and average time required to resolve customer issues

- **Internal data:** employee tenure, employee satisfaction, performance relative to peers, internal certifications or training programs, and unique personal situations that affect scheduling

Managing the details your workforce and how everyone fits together—whether they are full-time, part-time, contractors, or a mix of all three—helps you go the extra mile for your employees and for your customers.

Knowing your workforce means you can:

Send a specially trained technician to a particularly challenging installation assignment

Send highly personable employees to customers who have experienced challenges with your company in the past

Reward high-performing employees and contractors for their work

Proactively reach out to long-time customers to acknowledge their loyalty

Address employee performance concerns before they become a significant issue

Honor an employee's request to take off certain days or times for personal obligations

Isolate opportunities for better training, onboarding, or hiring procedures

Gathering, storing, analyzing, and using this data may seem like a daunting task, but the right mobile workforce management system makes it easy. A strong mobile workforce management system integrates with popular CRMs like Salesforce and ServiceNow, giving you a centralized place for all your critical data. The system should also provide robust communication tools, allowing you to communicate quickly and easily with mobile workers, no matter where they are.

" By using Skedulo we now have an idea of what's happening during the day with our fleet. We are able to communicate better with customers and give them a more realistic ETA."

– **Tammy P.**, Social Enterprise Director at Furniture Bank

The Skedulo solution for managing complex jobs

Skedulo's mobile workforce management platform is designed to handle the complexity of any team in any industry.

Skedulo can help you optimize for key business goals like cost reduction, customer retention, employee development, and more. With our intelligent scheduling software, you can analyze job data for a better understanding of your workforce, then use advanced scheduling tools to create recurring appointments, generate custom schedules, or automatically assign jobs to the right person based on your business goals.

Skedulo integrates natively with Salesforce and ServiceNow, and you can build intelligent scheduling into your own custom app with the Lens API. With all of your data in one place, you can make the most of the skills and talents of your workforce and give customers a superior service experience.

Request a free demo to see the Skedulo platform in action!

Skedulo

Skedulo is the platform for intelligent mobile workforce management. Our solution helps enterprises intelligently manage, schedule, dispatch, and track resources in the field, whether they are full-time, part-time, or contract employees. With native solutions that integrate seamlessly to Salesforce and ServiceNow, and our independent platform that connects to any system of record, Skedulo offers enterprises and mid-market companies a mobile workforce management product that complements any tech stack.

Founded in 2013, headquartered in San Francisco and with offices in Australia, Asia, and the United Kingdom, Skedulo has enabled over 100 companies to seamlessly schedule and service more than 5 million appointments all around the globe. The company secured $9.2 million in Series A funding in 2016, led by Costanoa Ventures. For more information, please visit www.skedulo.com.

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