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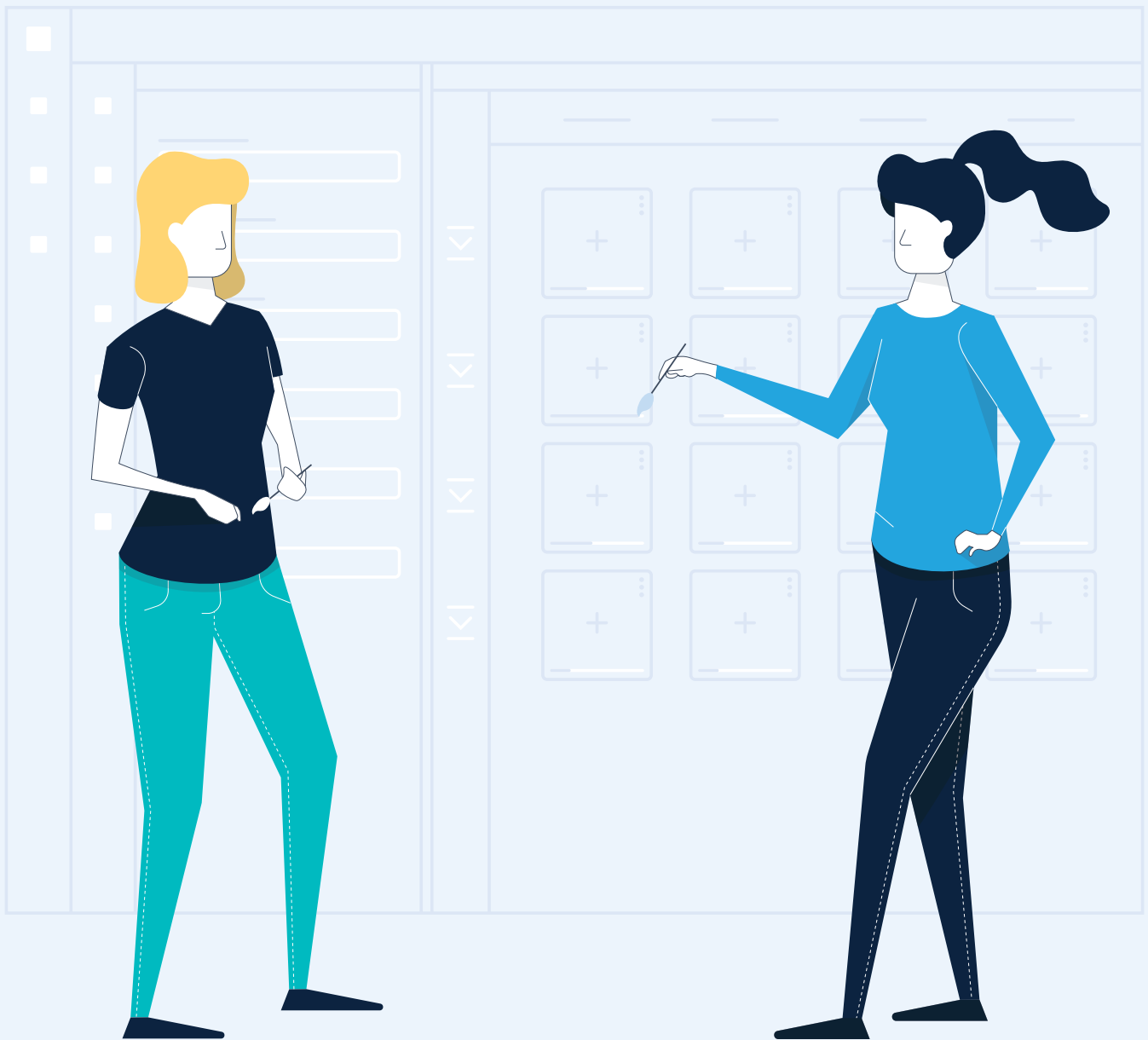# 5 Secrets to Evaluating the Best Mobile Workforce Management Solution

Mobile Workforce Solutions Should Be: Mobile First, Flexible, and Easy to Use!

The year 2020 used to sound like a futuristic date, but now it's right around the corner. **By 2020 nearly three out of four workers will be mobile-ready.** That's what IDC concluded in their study of how the American workforce is reinventing itself. **There will be 105.4 million US workers, 72.3% of the workforce,** who are mobile-enabled in the very near future.

It's clear why companies have a preference for mobile-enabled workers. That same report found that 69.1% of companies saw a huge reduction of CapEx or OpEx from their mobile operations. To capture those savings, however, companies deployed a mobile workforce management solution that minimized their scheduling and administrative costs.

There are many mobile workforce management tools on the market, but relatively few that can match your current needs and your growth plans. Take advantage of where you are in the buying process, and learn from the mistakes by early adopters of mobile workforce management solutions.

The question you should be asking is: What kind of mobile workforce management solution do you need for your company?

Fortunately, first movers have already gone down this road. They have created a series of best practices and questions to ask in evaluating the smartest investments in mobile workforce management. Typically, companies that put in the hard work to find the answers jealously guard their secrets, but now at last those secrets can be revealed.

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To evaluate mobile workforce management solutions for your organization and choose the best, consider the following:
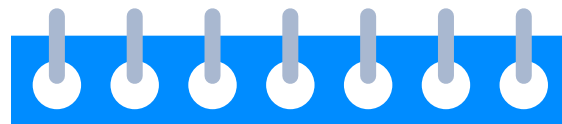
Secret 1

The Answer Lies Within

Assemble a taskforce of key stakeholders to document the biggest bottlenecks with your current system. Make sure you get candid assessments of current processes in terms of likes and dislikes. Be prepared for some resistance to change. Some of your stakeholders will have a strong emotional attachment to what is working, even if it falls short of the ideal. Don't forget to use data and growth goals to critique existing systems.

Here are some common pain points that many organizations are facing:

- Your workforce is changing faster than expected and your software can't keep up.

- Your workforce management software is not optimized for mobile or for offline capabilities.

- It's too difficult for workers in the field to find and update the information they need.

- Time spent planning and updating schedules is spiraling out control because you still rely on manual methods like Google calendar, Excel spreadsheets, or even pen and paper.

- Once mobile workers are dispatched, you have no visibility into what's happening in the field until the end of the day or when they call in to report that things didn't go as planned.

- Too much productivity has been lost due to inefficient routing and travel delays.

- Communicating schedule changes tends to be unreliable – when you call/email/text the new information, the receiver doesn't always see it or acknowledge it.

- Customers often call asking for status updates about an upcoming appointment or wanting to give additional information to the mobile worker before a meeting and you don't have a way for the customer to reach them.

Pro Tip

Schedule a meeting with key stakeholders to identify the bottlenecks at each stage of the scheduling, deploying, and managing of your mobile workers.
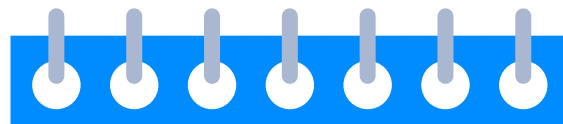
Secret 2

From Start to Finish

Once you define what isn't working, the next step is make a wish list for the perfect solution. With so many moving parts in field organizations, it's critical to ensure that the process is streamlined and efficient.

Here are common best practices of successful mobile workforce organizations that you should leverage:

- Ensure you are sending the right person to the right job at the right time by having visibility into essential data points such as skills, certifications, customer preferences, and availability.

- Automatically notify your mobile workers of new jobs and appointments with push, SMS, or email notifications.

- Automatically communicate appointment logistics and other key information so you team gets the job right on the first trip.

- Track job and appointment progress in real-time as your workers accept, travel to, check-in, start, and complete each job.

- Capture customer data such as signatures, photographs, surveys, etc in the field and send to the office.

- Confidently tell your customers when you'll arrive with precise service appointments based on availability and location rather than estimated service windows.

This is just an example of all the moving parts of a field organization, and how successful organizations are ensuring there is a streamlined process. At this point, you are finally ready to create an outline of the workflow you envision for job creation, scheduling, job execution, and reporting.

Evaluate how the solution will integrate with your current workflows and systems. Make sure it supports your mix of devices (i.e. smartphones, tablets, watches, etc). This helps to establish that the solution is a good investment and can start working with little to no downtime. In addition, the platform should be easy to use with minimal training and should have a short implementation time.

Pro Tip

Compare the features of your mobile workforce management vendor to the bottlenecks you are trying to solve for. The vendor should be able to provide you with capabilities to help you reach your goals.

Secret 3

Workers are Customers, Too

Your efforts to improve the customer experience should extend to your workforce as well. Keep the experience of your mobile workers in mind during your evaluation process.

The best system can't work unless the frontline workers feel confident about the solution and are motivated to change their old habits.

Bring your mobile workers on as stakeholders and find out what their top pain points are. Solving these problems not only delivers a better solution with a smoother transition, it keeps workers engaged and boosts your employer branding. It could even reduce churn and act as a magnet for attracting the best talent on your next hiring cycle.

There's no question that a positive user experience for mobile workers simplifies new tech adoption. Both of these will play a major role in a successful rollout. Members of your organization will be using the applications on a daily basis so it should be engaging and intuitive. Ideally, the solution should encourage users to wake up excited about their day ahead. In paying careful attention to a quality user experience, you will be able to realize further efficiencies as you empower and engage your mobile workforce.

The end-user includes the customer, the mobile worker, and the scheduler in the back office. Everyone involved from job creation to job completion should be on board.

Assign a project champion on your leadership team to take the pulse of the workforce before selecting a solution, and then answer questions throughout implementation.
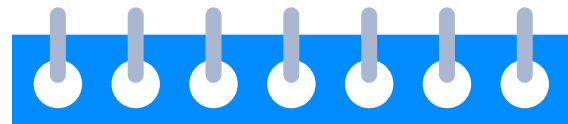
Pro Tip

Ensure key members of the organization are on board with the new technology you are thinking of implementing.

Secret 4

The Data is Out There

There is nothing as frustrating as knowing that the data you need is just out of reach. Unfortunately, that situation is all too common for managers today. Field Service News reported that **four out of five field service managers are frustrated because they cannot access the data they need to do their job effectively.**

Approximately 30% say that their organizations are collecting all the right data, but are very ineffective at analyzing and applying knowledge from the data.

Tell your managers not to give up hope. Both the amount of data and the way it is reported can be vastly improved just by choosing the right mobile workforce management solution.

The vendor you are looking for will be one that has a good track record of dealing with data complexity and delivering spot-on solutions for every one of their clients. Talk to vendor experts and ask for customer testimonials.

Once you know what needs to be fixed, the solution delivers on features you need — plus you have buy in from your admin staff and the mobile workforce — it's time to put together your comprehensive roll out plan.

That includes sections like:

- Detailed Timeline

- Setting Expectations for Stakeholders

- Competitive Vendor Analysis

- Recommendations

- Vendor Reference Checks

- Case Studies (including details on successful delivery and implementation)

Doing research on the vendor before hand is critical. You want to ensure they can deliver on their promise and can work well with your team to accomplish the goals you defined.

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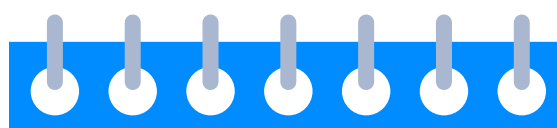
Pro Tip

Do your research on the vendor through customer references, case studies, online reviews, and competitive analysis to ensure they can deliver on their promise.

Secret 5

Have an Answer Before You Ask a Question

The final step is to define what you will consider as a success. Come up with a series metrics you will use to make improvements to your new scheduling software.

For every question like "How do I increase productivity?" prepare a metric that lines up with your budget forecasting. For example, you can define the kind of workforce productivity enhancements you want to achieve by setting a goal of: "The mobile workforce management solution should increase mobile workforce utilization by X percent or lower the cost of job execution by $Y."

Come up with a series of metrics to evaluate your implementation.

The most common metrics businesses want to see are solutions that:

- Improve operational efficiency

- Decrease administrative costs

- Time spent making an adjusting schedules

- Boost customer satisfaction ratings

- Boost engagement by your mobile workforce

- Roadblock/scheduling conflicts and resolutions

- Applied learning with usage data

Now the secrets are out. It's time to make your choice and start deploying the smartest technology to manage the new mobile workforce. The future is here, ready or not. You can be too!
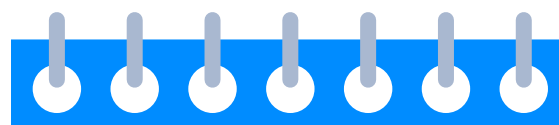
Pro Tip

Come up with benchmark data to track against to show your stakeholders the improvement in efficiency and reduced costs you were able to achieve by implementing technology to your organization.

Skedulo

Hassle-free mobile workforce scheduling—built for the field and loved by the entire team

For a growing number of organizations in the non-traditional field service industry, efficient and affordable solutions for mobile-workforce scheduling are helping mid-market firms move beyond outdated manual scheduling and into an era of speed, simplicity, and efficiency. Previously only available and affordable to companies with the resources to make large, long-term investments, mobile workforce scheduling is now accessible to the mid-market.

Skedulo builds essential mobile-first applications for growing businesses that empower people at work. With intelligent resource mapping, complex scheduling automation, instantaneous service updates, geo-tracking, and native integration with Salesforce.com and ServiceNow, Skedulo empowers organizations worldwide to transform the way they manage and deploy their mobile workforces. By eliminating logistical limitations, and providing unparalleled on-demand scheduling tools and transparency, Skedulo allows companies to deliver on the promise of a world-class client experience, from service request to completion.

Founded in 2013, and with offices in Australia, North America and Asia, Skedulo has enabled companies to seamlessly schedule and service more than 2.3 million appointments all around the globe. For more information, please visit www.skedulo.com

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