

---

# THE SEVEN DEADLY SINS

---

Of Managing Workers in the Field

## About Kirona

Founded in 2003, Kirona is recognised as a leader in the development and delivery of Field Force Automation software solutions.

# 01

## PAPER BASED SYSTEMS



Expecting field workers to use paper based records is fraught with **potential disaster and inefficiency**.

Paper requires incredibly busy personnel to use notebooks to record information in the field and then input it again when back in the office, often into multiple systems. After four, five, six or even more jobs per shift, paper can be lost, handwriting can be illegible, and data entry mistakes made. Perhaps the greatest consequence of this unnecessary administration is that skilled employees spend less time with customers.

### KIRONA'S TIPS:

- Deploy mobile applications in the field so that employees only have to record information once while in the field. This improves accuracy of data and frees up more time to carry out more jobs per day. Mobile communication can also reduce inefficient back office administration tasks, or be used to record the information needed for audits.
- Use a workflow driven series of checklists and fields on the mobile device to make sure individual workers follow a standard process. This will ensure continuity of good practice across a region.
- Mobile devices are far more secure than paper. If they are lost data can be locked-down through encryption, or even remote access and most mobile apps or data forms can be remotely cleared from the devices.

# 02

## MANUAL SCHEDULING



Efficiently appointing who visits which site is so complicated that using a **manual scheduling process is a big no.**

Staff availability vs skills vs customer/site availability is difficult enough to balance, add to that factors like service levels, job location, cancellations, even traffic on the road and efficient scheduling is almost impossible.

### KIRONA'S TIPS:

- Deploy dynamic scheduling software that can, in real-time, optimise the utilisation of workers in the field - the right person goes to the right location at the right time. This way they spend more time on site and less time waiting for the next job or, for instance, driving unnecessarily long distances to the next job.
- Scheduling software can be tuned to deploy personnel based upon pre-set 'rules'. Work with your technology vendor to utilise this feature so that services can be optimised; like prioritising workers that have visited the site or customer before, or restricting distances to be travelled by employees, or scheduling according to customer needs.
- Consider that most mobile working visits will usually need a follow up visit or another appointment made with a different worker - your scheduling software can allocate new appointments and visits - there and then.

# 03

## FAILING TO INTEGRATE SYSTEMS



**Busy staff are often overwhelmed with the amount of departments or agencies they have to collaborate with and the number of systems that they have to provide information to.**

By failing to integrate these systems, workers spend many more hours than need be, rekeying data into multiple back-office systems - duplicating effort and creating the potential for mistakes and errors.

### KIRONA'S TIPS:

- Choose a mobile solution that can integrate and 'communicate' with any system. If implemented correctly this will mean that staff will only need to enter information into their mobile devices once, whereby the data then populates all relevant back-office systems automatically.
- Integrating mobile applications with scheduling systems is particularly powerful. The mobile software can update the schedule with the emerging day information; allowing visits to be automatically redistributed between staff where visits over-run, customers are unavailable, appointments are cancelled etc.

# 04

## HAVING NO VISIBILITY OF FRONT LINE SERVICES



By failing to have visibility of operations in the field, **organisations fail to respond to challenges as they happen and lose the opportunity to resolve them at minimum cost and disruption to the customer.**

Limited visibility of field operations also hampers an organisations attempts to identify potential improvements for their staff and their service users.

### KIRONA'S TIPS:

- Providing mobile devices enables you to track all the factors which impact field performance like: routing of employees, time spent onsite, incomplete jobs, missed appointments, lateness etc. This data can be used to analyse operations, fine tune the scheduling engine or to demonstrate ongoing improvements in efficiency.
- With GPS and two-way communication, mobile also provides good support for lone workers in remote locations or areas where there may be a security problem.

# 05

## HAVING LIMITED CUSTOMER INFORMATION TO HAND



**Arriving at the customer's location without complete historical notes puts the service provider at a disadvantage** when providing its services and is disappointing for customers who expect their service provider to have comprehensive knowledge of their relationship.

### KIRONA'S TIPS:

- By using mobile technology the appropriate notes can be delivered to the workers' mobile devices when they are needed. This means a professional can provide a service with the continuity the customer would expect. It also reduces the risk of them not being able to deliver that service on their first visit.
- Organisations can allow historical records to be sent to field workers for that customer, allowing them to see full details of historic work completed with any certificates, photos, contracts that are relevant. They can also see future planned work future work. This minimises the risk of duplicating work that has already been done or will be done during the course of a contract.

# 06

## FAILING TO USE A MODERN APPOINTMENT SYSTEM



For organisations that are delivering a business to customer service, arriving at the appointed time to find the **customer is not available represents a huge expense to that organisation;** it is also time-consuming and frustrating for the field worker.

The causes are often antiquated and inconvenient appointment systems, and/or human error. Increasingly busy service users may forget appointments or be frustrated by all-day appointment windows.

### KIRONA'S TIPS:

- Use appointment based scheduling technology that makes it easier for customers to book a narrow time slot that is suitable for them up to weeks in advance.
- Use dynamic scheduling technology that automatically re-allocates those visits in jeopardy of being missed to other colleagues.
- Combine the mobile applications with SMS and Email technology to not only send advance appointment reminders but also "operative on route" messages.

# 07

## FAILING TO MANAGE CULTURAL CHANGE WHEN IMPLEMENTING FIELD TECHNOLOGY



With advancement in technology comes a **huge opportunity for an organisation** to make the most of its skilled workforce.

However for many who may not be fully up to speed with the latest technology, it also represents a big change in the 'way things are done'. Not managing their expectations could result in an expensive project failure.

### KIRONA'S TIPS:

- Involve work planners and field staff at the start of the process. By involving them early you can identify issues and address them quickly. You will also build enthusiasm and inertia for a successful project.
- Ensure that the "culture change" is minimised by working with the existing business process – rather than against it.
- Lengthy training can easily be avoided by making the mobile apps simple and similar to the paper based forms currently in use.



**General enquiries**

Tel: +44 (0)1625 585511 Email: [info@kirona.com](mailto:info@kirona.com)

**Head Office**

Kirona Limited, Barrington House, Heyes Lane, Alderley Edge, Cheshire SK9 7LA