

myFLO

WORK ORDER MANAGEMENT

INCREASE WORKFLOW EFFICIENCY & PRODUCTIVITY

A myFLO White Paper



INCREASE WORKFLOW EFFICIENCY & PRODUCTIVITY

There is no doubt that in order to compete and be profitable in today's 24/7 business environment a business must 'out-compete' its competitors in efficiency and customer service.

This is particularly so in service oriented businesses which are reliant on field staff to provide their services.

Such businesses face common challenges which vary little across the various industry sectors. These challenges include:

- Clients are looking for increased service value and expectations at a lower price.
- Longstanding, happy client relationships are being shopped around and other providers are quoting the same or similar service at a lower rate.

When confronted by these challenges many businesses simply resort to telling their customer that the comparison is not an apples for apples comparison and leave it at that. They don't adapt and develop improved solutions to meet their customers' needs.

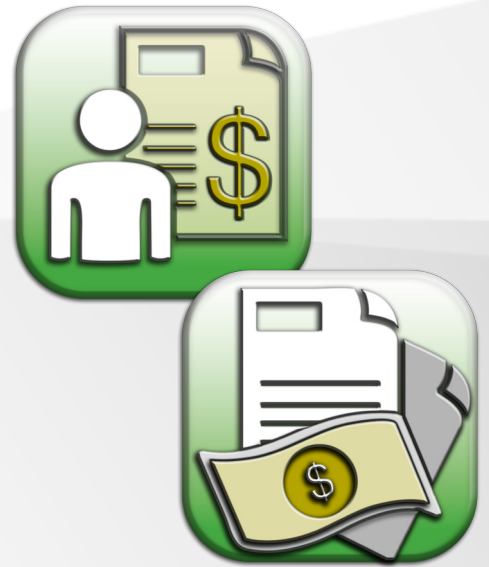
If the customer is asking questions you have to provide the answers that they are looking for or risk losing them. Don't forget that they are probably also in the position of reigning in their own costs to be more competitive for their own customers.



Clients are looking for increased service value & expectations at a lower price.

REDUCING COSTS AND ADDING VALUE

The main cost components in the operation of a service based business are:



PROPERTY Infrastructure necessary to support the business.

STOCK Supplier stock or equipment that needs to be warehoused, to support your client service requirements.

LABOUR Normally the largest cost component for a service based business. It includes all employees necessary to perform the services required by Clients, whether it is corrective action repairs (reactive repairs that need to be rectified by an agreed response time) or programmed service (recurring service where assets are inspected, tested or maintained).

Businesses can look at all the above aspects in attempting to become more competitive but it is in labour cost and performance that they can make the greatest inroads. This is particularly relevant to the field staff and their productivity and the business return on their investment in those staff.

It is all about minimising the labour time spent by field staff and internal support staff on a particular job from receipt of the job request through to invoicing.

Consider

The following scenarios where a company can reduce the total labour time necessary to perform specified tasks:

- The number of administration staff required to manage the information flow to and from the field staff - Issues of double handling of information and paper transferring between field staff and administration staff is the cost multiplier in this area.

It is all about minimising the labour time spent by field staff and internal support staff on a particular job from receipt of the job request through to invoicing.

- Increase and optimise the number of field staff productive hours in a working day. - Travelling to and from the office or between jobs within a working day can lead to multiple hours of lost productive time.
- Reduce the unnecessary administration time that field staff spend on a job which drags out the actual time spent on the individual job, this can be caused by things such as lack of historical knowledge which requires contact with and explanations from other staff. A similar situation can arise where incorrectly qualified or experienced field staff are sent to site and find that they cannot perform the work without assistance.



The solution

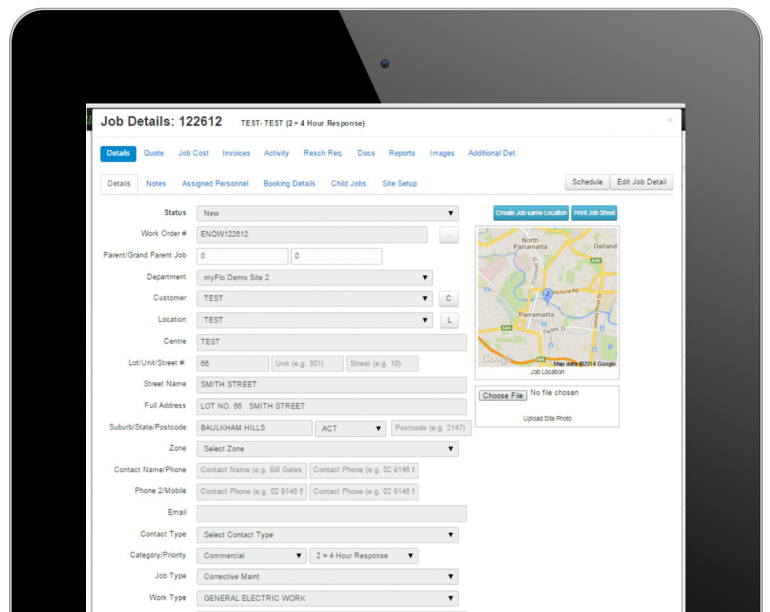
These issues can be overcome by implementing the correct job management system.

The challenge is to choose the correct solution for their business.

Choosing a system can be an overwhelming and painful experience. The key is to know the issues you need to resolve.

Our experience has shown that the best outcomes are achieved by following these steps:

1. Map the workflow of various jobs performed.
2. Identify throughout the business processes where staff time inefficiencies exist.
3. Once this has been achieved you will now be in a strong position to shortlist 3 to 4 job management packages available.



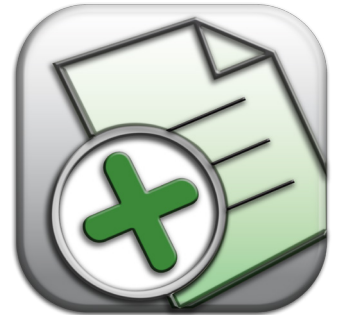
A PRACTICAL CASE STUDY

We will look at a typical corrective action repair and how the workflow should be supported by a job management system.

The following are generally the steps in the process:

1. RECEIVING A CLIENT WORK REQUEST

- By Fax, Phone or Email. These days more and more clients are submitting their corrective action repairs via email.
- Emails are either received in an unstructured format where Clients are simply typing the contents of the work request in the body of the email. In this situation administration staff enter the data/information into the system.
- From this point on this data should never be required to be entered again in an efficient job system.
- Systems generated work emails can provide the opportunity for the work request to be imported automatically in the job management system, alleviating the need for any data entry.



2. SCHEDULING JOBS FOR FIELD STAFF

Generally this task is allocated to a staff member who:

- has a good understanding of the field staff skill set,
- the areas to which each field staff are assigned,
- and a good knowledge of client service sites.

A superior job management system should enable you to

- set the field staff qualifications,
- define field staff service areas and
- enter the coordinates of each client site that needs servicing as master data options.



By transferring this information to a system, it means that knowledge can be shared with authorised staff, allowing

- Scheduling to become a simple task where the job management system just displays the appropriate qualified field staff for that area.
- All existing jobs assigned to each field staff are colour coded according to how close they are to the job needing to be scheduled.
- Administration staff to simply drag and drop the job card (using a mouse) against the field staff member with the relevant qualifications and availability, closest to the job.

Once the job card has been assigned to the field staff for a particular day, this job is now available on their mobile device. Any new work assigned to the field staff during the day can notify them by SMS or email reducing the need for an admin person to call.



3. DESPATCHING JOBS TO FIELD STAFF

For businesses not using mobility, this is normally done either at the beginning of the day where the field staff come into the office to receive their run sheet or receive their run sheet by email to their phone. The major drawback with these methods is the information received is not real time and generally it requires an administration staff member to organise despatch at the end of the previous day.

For job management systems with mobility, this process is automatic and created when the job is assigned to a field staffer on a particular day.



4. THE FIELD STAFF PERFORMING THE WORK ON SITE

Where a company doesn't use mobility, this is normally carried out by the field staff following the run sheet assigned to them for the day. For each job they would need to:

- Complete a risk assessment and job report details of that job on paper.
- Return paper forms to the office at the end of the day or the beginning of the following day for processing and invoicing.
- This process is time consuming especially when staff are translating the information written by the field staff on the job sheet to invoice the customer.



THE myFLO SOLUTION

WORK ORDER MANAGEMENT

myFLO greatly simplifies the process for both field staff and administration staff.

Field staff members simply select the first job card in the list for the day then select the clock icon to clock onto the job, this one action can automatically initiate a number of triggers:

1. The start time on the job.
2. The start time for the Field Staff Timesheet.
3. Allows authorised staff to see, from the system, when the staff member is on the job.
4. Allows an Email to be sent to the Client contact and responsible Admin officer, advising that the field staffer is onsite attending to the job.
5. Display any electronic forms the Field Staff are required to complete for that job.



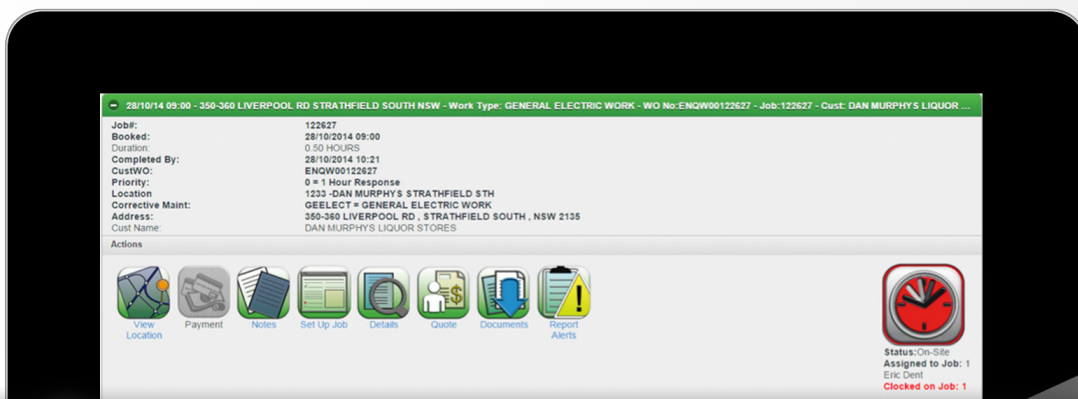
Before a field staff member commences the job, in most cases, they must first complete a risk assessment of the site for the work they are about to perform.

myFLO also has features where administration can be notified within, say, 10mins after clocking on to a job to alert administration that the field staff member has not commenced the risk assessment.

With myFLO field staff must first complete a risk assessment before they are able to access the job detail report to take photos before and after the repair, add any materials used and capture a signature from the field staff and customer on site. myFLO does not allow field staff to complete the job until the electronic forms are completed.

Once the field staff member has completed their work they then simply clock off and mark the job as complete. This one action can perform the following functions:

1. The job then disappears from the field staff list, staff can then trigger the “in transit” function on the next job to indicate to administration that they are on their way to the next job.
2. Administration and the client can receive an automated email notification immediately on completion of the job.
3. The job then appears on the administration completed jobs list for invoicing.



Invoicing and sending related documentation to client

Where companies don't use mobility, once they receive the completed job documentation; they then must perform the laborious task of transferring the materials and labour details and costings from paper to the job management system and then apply the appropriate pricing. Once the invoice is generated they then use Outlook to email the invoice and the scanned job details report to the client.

With myFLO the administration user simply selects the job from the completed jobs screen and reviews the chargeable materials and hours that have already been entered by the field staff member.

myFLO will already have the costs and charges assigned as they are entered by the field staff and due to the ability to setup price books for clients. The administration user simply needs to generate the invoice and then email it and job report documents directly from myFLO to the appropriate client.

ABOUT

myFLO

WORK ORDER MANAGEMENT

myFLO was developed in conjunction with leading businesses in the service maintenance industry to help improve their efficiency and customer service as well as reducing the administration expenses involved in managing large numbers of service jobs across a large workforce and a diverse client base.

myFLO implements the most efficient workflow processes to ensure that our clients have optimal outcomes in their goal to working smarter.

Incorporating over 20 years of industry experience **myFLO** has been built around a robust core utilising the latest technologies to ensure that the system is easy to understand and use while providing powerful functionality for all users.

myFLO undergoes continual development and upgrades to ensure that it evolves to cater for advances in technology and the needs of business.

The focus of **myFLO** is to ensure that it is the most efficient product and service to assist service maintenance businesses whether they are single location businesses or large national or multi-national organisations.



To contact myFLO call **1300 78 46 60** or visit www.myflo.com.au