Customer Service Technology In The Field
Opportunities and Challenges With Mobile Workforce Management

➢ What is Mobile Workforce Management (MWM)
➢ How Does It Work?
➢ What Does It Do For You?
➢ What Does It Look Like?
➢ What Are Some Key Questions About Implementing Mobile Workforce Management?
Mobile Workforce Management – What Is It ???

Mobile Workforce Management Applications

- Service Requests
- Dispatching
- Resource Coordination
- Service Assignments
- Routing
- Mobile Workforce Communications
- Service Crafts / Skills
- Field Resource Availability
- Customer Appointment Scheduling
- Service Scheduling
- Field Resource Capacity vs. Demand
- Locations
How Does Mobile Workforce Work?
It is a Process!

- Generate / Initiate Orders
- Plan / Schedule Work & Resources
- Optimize – Assign & Route
- Dispatch / Monitor Work & Resources
- Receive / Execute / Complete
- Update / Analyze
Mobile Workforce Management – What Does It Do For You ???

Capabilities / Business Value

➢ Initiates all field work – customer problem investigations/resolutions, inspections, repairs, etc.
➢ Improves labor resource utilization throughout the work day – automation vs. manual (paper)
➢ Optimizes scheduling and routing – assign by location/skills/equipment, ability to reassign orders
➢ Provides mapping – locations of services/assets and driving directions
➢ Reduces drive time, increases wrench time
➢ Provides field resources ease of access to valuable information
➢ 360-degree view of labor resources – skills; assignments; locations, WIP
➢ Improves customer responsiveness, SLA’s, efficiencies, and reduces costs
➢ Real time updates to integrated systems (CIS/CRM/AM) and “end-to-end” view of work in process
➢ Some applications link to Asset/Maintenance applications for long-cycle work
Mobile Workforce Management
User Interface

FIELD TECHNICIAN NATIVE MOBILE APP

- Work Order & task updates
- Inventory and Time reporting
- View pdf, Related docs
- Email
- Capture Pictures of Work Done
- Capture Customer Signatures
- Attach Notes
- Collaborate
- Work Offline
- Scan Bar Codes to find parts
- View Context based analytics
- Available on Phones & Tablets

KloudGin
Mobile Workforce Management – Planner/Scheduler/Dispatch User Interface
Mobile Workforce Management – “Like an App”
Mobile Workforce Management (MWM)
An Integrated System Requires an Integrated Strategy

What are your requirements? Understand and document
• Understand people, business process & tech needs
• Evaluate technology options – devices and software
• Assess integration requirements & opportunities
• Match your needs/requirements to market offerings

What is your MWM strategy and implementation plan?
• Don’t go to the candy store!!

Who provides MWM solutions?
• CIS vendor - strong interface to the billing system
• GIS vendor - strong interface to GIS system
• Third party - ease of use, integration requires more effort

What technology are you currently/planning to use in field?
• Costs and support
• Durability, usability, connectivity

What is your strategy for mapping?
Questions?

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Experiences From Utilities That Have Implemented MWM

Aqua America
Greenville Utilities Commission
Town of Cary

• Benefits
• Challenges
• Lesson learned