



For Operations Leaders

7 Ways to Cut Friction in Field Operations

What operations teams did about paper, spreadsheets, and not knowing what is happening until it is too late.

Includes new findings from TrackVia Field Operations Research, a review of how top TrackVia customers run their field operations.

**Connect the work.
Control the operation.**

Operations teams have already closed the information gap. Here is how.

The permit is in one place. The safety form is on paper. The production numbers are in a spreadsheet that someone updates once a day, if you are lucky. By the time you see the full picture, it is out of date. Your people are working hard, and a lot of that effort goes to looking for information and typing it in again.

TrackVia reviewed how top customers run their operations. Here is what stood out.



Before automating and mobile-enabling these business processes, more than half of organizations also had no central, live view of the work. Twenty-three percent said they tested another off-the-shelf solution but found it was too rigid, data was still out of date, or it was too difficult to implement.

WHAT OTHER TEAMS ARE RUNNING

Share of TrackVia customers who have automated and mobile-enabled specific business and field processes:

Best practice	All customers	Construction	Manufacturing	Healthcare
1. Field inspections	60%	75%	57%	35%
2. Crew and subcontractor management	31%	83%	29%	18%
3. Work order management	31%	92%	14%	6%
4. Parts and materials inventory management	23%	42%	29%	41%
5. Asset tracking	20%	25%	14%	24%
6. Safety and compliance	16%	42%	7%	18%

Construction teams connect the most, led by work orders (92%), crew and subcontractor management (83%), and field inspections (75%). Across all industries, field inspections are the most common at 60%.

FIND YOUR STARTING POINT

Not sure where to start? Here are a few simple examples based on the challenges your peers faced and where they started.

If your day looks like this...	Start with
Problems found in inspections sit for weeks	Best practice 1: Field inspections
You build the schedule on a whiteboard or in texts, and payroll is a chore	Best practice 2: Crew and subcontractor management
Requests come in by phone, email, and text, and some get lost	Best practice 3: Work order management
Crews make second trips for parts, and job costs are a guess	Best practice 4: Parts and materials inventory management
Nobody is sure where equipment is or what shape it is in	Best practice 5: Asset tracking
Audit prep is a scramble	Best practice 6: Safety and compliance
Equipment fails before it gets serviced	Best practice 7: Preventative maintenance



BEST PRACTICE 1

Field inspections

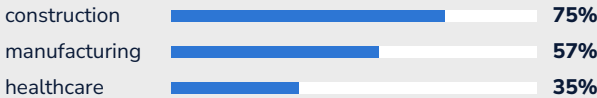
Catch problems early, and get the fix started automatically.



TRACKVIA FIELD OPERATIONS RESEARCH

USED BY
60%

of TrackVia customers, the most common use case



PAIRS WELL WITH

Of the leaders who implemented automated and mobile-enabled field inspection, 81% also run at least one other automated business process. The most common are scheduling (48%), field operations (40%), and safety (31%).

THE PROBLEM YOU KNOW

Inspections are on paper, or in an app that connects to nothing. A problem found today can sit for weeks before anyone acts on it. The quality of an inspection depends on who happened to do it.



WHAT IT COSTS YOU

Rework. The same issue showing up again and again, with nobody connecting the dots. Arguments about whether something was actually inspected.

THE BEST PRACTICE: HOW OTHERS SOLVED IT

Each site, asset, or job gets one checklist, so every inspection follows the same standard no matter who does it. The inspector completes it on a phone. Photos, notes, a timestamp, and location are captured as it happens, and each item is scored pass or fail. When something fails, the work to fix it is created automatically. The next inspection is scheduled on its own. Pass and fail results roll up by site or asset, so a repeat problem shows up after the second or third time, not the tenth.

A hospital ran its surgical instrument sterilization audits on paper. Now a mobile app walks staff through every step, with photos, notes, and a timestamp on each task, and each step is tied to a requirement from the national standard. Leaders can see results by facility, employee, and shift. For the first time, the hospital runs one standard inspection program across 3 hospitals and 8 outpatient centers.

Another example: a company that buys from farmers assigns each farmer a field technician. The technicians complete surveys on a mobile device, even without a signal, and the surveys capture the location data that new regulations require as proof.

WHAT CHANGED

Before
Paper checklists, retyped later
Findings wait for someone to follow up
One-off reports

After
→ Checklist on a phone, with photos and location
→ A failed item creates the fix
→ Trends by site and asset

TRY THIS FIRST

Look at your last 10 failed inspection items. How many were closed, and how long did each take?

WHAT YOUR CFO WILL CARE ABOUT

Problems caught early cost less to fix.
(Best Practices Business Report)



Crew and subcontractor management

The right people on the right job, with the paperwork already current.

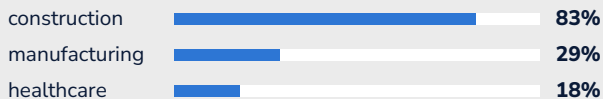


TRACKVIA FIELD OPERATIONS RESEARCH

USED BY

31%

of TrackVia customers



PAIRS WELL WITH

Of the leaders who have implemented crew and subcontractor management, 74% also automated field inspections, 55% implemented field operations, and 30% also automated safety and compliance.

THE PROBLEM YOU KNOW

The schedule lives on phone calls, texts, or a whiteboard. Time cards are printed, filled out by hand, driven back to the office, and typed in. When a customer asks for a subcontractor's insurance, someone has to go find it.



WHAT IT COSTS YOU

Payroll errors. Workers who clock in from somewhere other than the job site, or clock in a friend. Crews sent to jobs without the right certification. Labor costs you can't fully trust.

THE BEST PRACTICE: HOW OTHERS SOLVED IT

Workers clock in from a phone. The clock-in is checked against the job site location, so a punch from a gas station five miles away gets flagged. A personal PIN means one person can't clock in for another. Hours go straight to payroll and to the job they were worked on.

Scheduling and dispatch use real skill and certification data. When a job calls for a specific license, only the people and subcontractors who hold it show up as options. Subcontractor management starts with onboarding once, and each subcontractor's insurance, licenses, and certifications are tracked in one place. That makes contractor compliance easy to show when a customer asks.

A commercial contractor had to print time cards each morning, drive them to the job, drive them back, and key them in for weekly payroll. Now workers clock in by phone, and foremen send daily reports from the field. The company schedules about 250 employees across more than 40 job sites every day, and each assignment is checked against certifications and equipment before it is confirmed.

WHAT CHANGED

Before

Paper time cards, keyed in weekly

Crew picked by who is free

Subcontractor paperwork in a drawer

After

→ Clock-in by phone, checked against the site

→ Crew picked by skill, certification, and equipment

→ Insurance and licenses tracked, with alerts

TRY THIS FIRST

Compare last week's clock-in times with the days each crew was actually on site. Any gap is worth a conversation.

WHAT YOUR CFO WILL CARE ABOUT

Accurate payroll and labor cost tied to each job.
(Best Practices Business Report)



Work order management

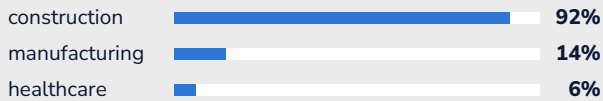
Every request, from first call to final sign-off, in one place.



TRACKVIA FIELD OPERATIONS RESEARCH

USED BY
31%

of TrackVia customers



PAIRS WELL WITH

Of the customers who automated work orders, 62% also automated field inspections, 55% automated scheduling, and 33% run billing.

THE PROBLEM YOU KNOW

Requests come in by phone, email, a portal, a walk-up, and text. Some get lost. Some get entered twice.

Some are forgotten until the customer calls. Your crews spend time chasing the details of a job before they can start it.



WHAT IT COSTS YOU

Jobs that go overdue before anyone notices.

Arguments about what was done and when. A back office that can't bill until the paperwork catches up.

THE BEST PRACTICE: HOW OTHERS SOLVED IT

Efficient teams put every request into one system, and each one becomes a work order. It has an owner, a due date, and a status. Guided steps dispatch the job to the right person, route it for approval when the cost or scope calls for it, and flag it when it is running late. When the work is done, the crew closes it out with a signature and photos on a phone. The proof is attached to the job automatically and data is routed directly to the payroll and invoicing systems to quickly take the appropriate action.

A utility contractor previously ran hundreds of fiber installs a week on one paper form. A supervisor, a surveyor, a foreman, and a crew passed it back and forth for days, and then a project manager retyped it into billing. Now the surveyor captures the site on a phone with location, photos, and notes. The finished record goes straight to payroll, invoicing, and project management. Invoicing dropped from about six days to a few hours, an improvement of about 80%.

WHAT CHANGED

Before

Requests arrived by five or six channels

Late jobs showed up when a customer called

Close-out depended on who remembered

After

→ Every request lands in one place

→ Late jobs are flagged before the due date

→ Signature and photos are required to close

TRY THIS FIRST

Count how many different ways a job request can reach you today. Each one is a place a job can get lost.

WHAT YOUR CFO WILL CARE ABOUT

Faster billing, accurate payroll, and fewer disputes.

(Best Practices Business Report)



Parts and materials inventory management

Parts and materials on every truck, in every warehouse, tied to the job that used them.



TRACKVIA FIELD OPERATIONS RESEARCH

USED BY
23%

of TrackVia customers

construction		42%
manufacturing		29%
healthcare		41%

PAIRS WELL WITH

Of the leaders who automated parts and material management, 55% also automated and mobile-enabled field inspections, 45% automated safety and compliance, and 45% implemented asset management.

THE PROBLEM YOU KNOW

A tech shows up without the part and has to make a second trip. Nobody can say for sure how many of an item are on hand, or where. Purchasing orders extra inventory just in case. Job costs are an estimate because the link between the part and the job is missing.



WHAT IT COSTS YOU

Lost hours on second trips. The same item bought at two locations. Money tied up in stock nobody can find or in excess inventory.

THE BEST PRACTICE: HOW OTHERS SOLVED IT

Superintendents request what tomorrow's jobs need the day before. The night crew loads the trucks, scans a barcode on each item, and checks off what actually went on. Anything missing shows up in a report the next morning, so the superintendent can adjust before the crew leaves. When a part is used on a job, it is logged against that job, so its cost goes into the real cost of the work. When stock on a truck or in a warehouse drops below a set level, a reorder request goes to whoever buys, without anyone having to notice an empty shelf. Regular counts confirm that the system matches the shelf.

A contractor now sees material use per job close to real time. It even tracks small items that are never charged to a job, like safety glasses and marking paint, so it knows when to reorder. The lesson is simple. When you send material to a job and don't know it, that job probably didn't perform the way you thought it did.

Another example: a logistics company moved its equipment orders out of spreadsheets with more than 60 fields per order and into one database for orders, inventory, rush orders, installation scheduling, and returns. It cut its overall cycle time in half.

WHAT CHANGED

Before

Second trips for missing parts
Job cost is an estimate
Reorders when someone notices
Carry excess inventory

After

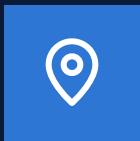
→ Missing items flagged the night before
→ Parts logged against the job
→ Reorders triggered at a set level
→ Order based on real needs and assigned only what's needed

TRY THIS FIRST

Pick one finished job. Compare what you ordered with what it used.

WHAT YOUR CFO WILL CARE ABOUT

The real cost of each job, and less waste.
(Best Practices Business Report)



BEST PRACTICE 5

Asset tracking

Know what you own, where it is, and what shape it is in.



TRACKVIA FIELD OPERATIONS RESEARCH

USED BY
20%

of TrackVia customers

construction		25%
manufacturing		14%
healthcare		24%

PAIRS WELL WITH

Of the leaders who have implemented automated asset tracking, 59% also implemented automated field inspections, 53% implemented inventory tracking, and 47% mobile-enabled field operations.

THE PROBLEM YOU KNOW

Where equipment is and what condition it is in lives in one person's head or in a spreadsheet at each site. Equipment moves between crews and nobody writes it down. When you need a number for all your sites, you have to ask each one.



WHAT IT COSTS YOU

Time spent looking for equipment. Duplicate purchases and increased expenses. Replacement decisions made in a panic when something fails.

THE BEST PRACTICE: HOW OTHERS SOLVED IT

Every asset gets a tag, such as a QR code or barcode, and one profile. The profile holds specs, service history, documents, and warranty information. Hours, miles, or cycles are logged against the asset. When it moves to another site or crew, the transfer is recorded and billing is updated accordingly. Equipment tracking becomes a look at a screen. Assets sit in a simple structure from region down to site, building, and individual asset, so a roll-up shows the health of every site at once, with a way to drill into any one.

A contractor must send out concrete pumps daily. Operators complete a walk-around inspection three times: before leaving the yard, when they set up on site, and before they leave the job. Each step records location, so the company knows where the pump is, how long it ran, and how much concrete went through it. The data goes to the finance system so equipment cost lands on the right job. Every serialized piece of equipment, from skid steers to laser screeds, is tracked the same way.

WHAT CHANGED

Before

Equipment location is a phone call

Condition known by whoever used it last

Each site reports in its own format

Asset usage is added to specific projects days or weeks later

After

→ Equipment location is on a screen

→ Condition and service history on one profile

→ One roll-up across all sites

→ Usage is tracked to specific sites and contracts in near real-time

TRY THIS FIRST

Pick your five most expensive assets and confirm where each one is right now. If it takes more than a few minutes, you have found your starting point.

WHAT YOUR CFO WILL CARE ABOUT

Knowing what you own before you buy more, and costs landing on the right job.

(Best Practices Business Report)

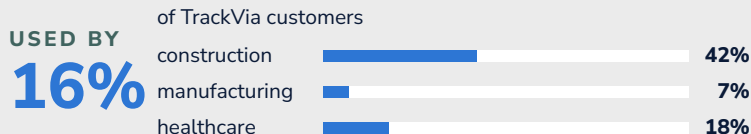


Safety and compliance

Be ready for the audit before anyone calls.



TRACKVIA FIELD OPERATIONS RESEARCH



PAIRS WELL WITH

93% of leaders who automated and mobile enabled safety and compliance also implemented field inspections. 64% also automated inventory management, and 57% automated scheduling.

THE PROBLEM YOU KNOW

Certifications and licenses expire and nobody notices. An incident is written up from memory days later. When an inspector or customer asks for records, you pull binders and email threads together at the last minute.



WHAT IT COSTS YOU

Liability exposure. Failed audits. A safety manager who spends more time chasing paper than preventing problems.

THE BEST PRACTICE: HOW OTHERS SOLVED IT

Incident reporting happens in the field, when the incident or near miss happens. Certification tracking covers licenses and permits too, with alerts that go out before anything expires. Job hazard analysis and toolbox talks follow one template. Corrective actions stay open and visible until they are closed. Safety data sheets and audit evidence live in one place that crews can open from the field, which keeps audit management simple. A compliance dashboard rolls up certification status, open actions, and incident history by site or crew, so a site that is falling behind shows up right away.

A contractor's crews complete a job hazard analysis every day before work starts. Anyone can log an incident or near miss from the app the same day. Certification alerts mean the safety team knows a forklift certification expires next month while there is still time to retest. The company also runs a "good catch" program, where any worker, even one without the app, can submit a photo of a hazard they fixed and earn a reward.

Another example: an organization that must prove its staff completed required reading and training used to tape paper sign-off sheets to an office door. Now coordinators sign off from their phones, the office gets an alert when a certification is complete, and every record keeps an audit trail. The team reports up to 80% time savings on data collection, program management, and reporting.

WHAT CHANGED

Before

Expirations found by accident
Incidents reconstructed from memory
Audit prep is a scramble

After

→ Alerts before anything expires
→ Logged the same day
→ Evidence already organized and ready to export

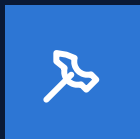
TRY THIS FIRST

List every certification and license that expires in the next 90 days. Next to each one, write the name of the person responsible.

WHAT YOUR CFO WILL CARE ABOUT

Lower risk and easier audits.

(Best Practices Business Report)

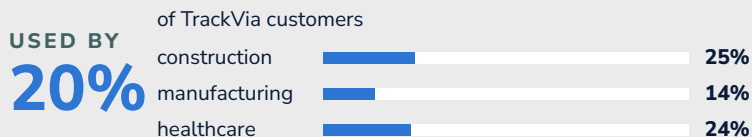


Preventative maintenance

Service equipment on schedule, before it breaks.



TRACKVIA FIELD OPERATIONS RESEARCH



PAIRS WELL WITH

Leaders who automated preventative maintenance often also automate asset management (90%) and field inspections (59%).

THE PROBLEM YOU KNOW

The maintenance schedule is on a spreadsheet or in someone's calendar. It is easy to miss. Work gets done after something fails, and the same machine keeps breaking in the same way.



WHAT IT COSTS YOU

Unplanned downtime. Higher repair bills. Warranty coverage lost when required service is skipped.

WHAT THE DATA SAYS

In a 2026 survey of 686 maintenance and operations professionals, teams completed only 54% of their scheduled preventative maintenance. 47% reported more than 10 hours of unplanned downtime in a typical month, and missed scheduled maintenance can cost \$100,000 or more in downtime. ([Limble State of Maintenance report](#))

THE BEST PRACTICE: HOW OTHERS SOLVED IT

The schedule is built once, on a calendar basis such as monthly or quarterly, or triggered by a meter reading such as hours or miles. After that, the work creates itself. Every completed job is logged to the asset's history, so there is a full record of what was done and when. Schedule adherence is tracked, so you can see whether the plan is really being followed. A seasonal campaign, such as servicing every HVAC unit before summer, can be set up once and rolled out to every site at the same time.

A healthcare organization keeps an inventory of the equipment used in its laboratory and donor services. Daily, weekly, monthly, quarterly, and annual quality checks run on each piece. Paper quality reviews and reports are gone, and every check is on record.

WHAT CHANGED

Before

- Schedule on a spreadsheet
- Service happens after a failure
- No way to see if the plan is followed

After

- Schedule creates its own work
- Service happens before it
- Adherence tracked automatically

TRY THIS FIRST

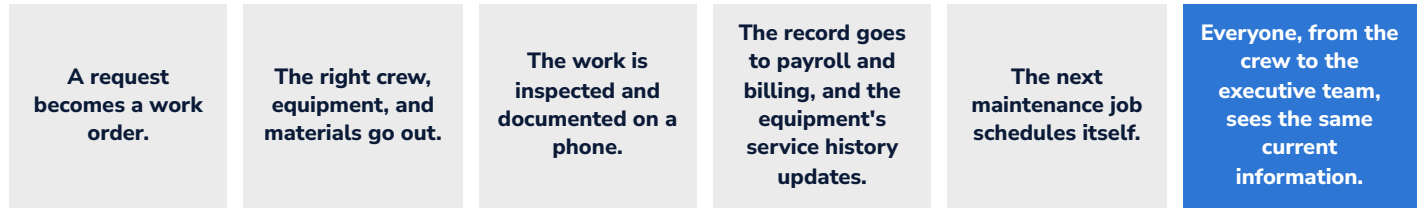
Pick your five most critical assets. Check whether the last scheduled service was done on time.

WHAT YOUR CFO WILL CARE ABOUT

Fewer breakdowns and longer equipment life.
([Best Practices Business Report](#))

The seven best practices work best when they connect.

Each best practice solves a problem on its own. They help even more when they share the same record.



That is what we mean by **Connect the work. Control the operation.**

WHAT TRACKVIA FIELD OPERATIONS RESEARCH SHOWS ABOUT HOW TEAMS BUILD THIS OUT

Customers do not all start in the same place. 36% of customers in TrackVia Field Operations Research automated a single process, and 46% automated three or more. Field inspection is the most common single use case (32%). Field inspection and scheduling are the most common pair, used together by 23% of customers. Construction customers connect the most, with a median of five. (*TrackVia Field Operations Research, October 2026*)

HOW TO START You do not need to fix everything at once.

- 1 Pick one site, one team, and one best practice from the seven.
- 2 Run it for 30 days.
- 3 Measure what changed in time saved, jobs closed, or problems caught.
- 4 Expand to the next one.

Field inspections are the most common use case among TrackVia customers, so they are a good place to look first.

ABOUT TRACKVIA

TrackVia is the field operations intelligence platform that helps organizations connect, control, and continuously improve mission-critical operations. It brings field teams, workflows, and enterprise data into one real-time system. For more than two decades, thousands of operational leaders have used TrackVia to build and run mission-critical applications across field and back office operations.

Start ready. Proven modules for all seven best practices, shaped by more than 2,800 builders who know the work firsthand.

Stay in control. Your own team can change forms, workflows, and dashboards as things change, with no waiting on a developer.

Work with what you have. More than 6,000 integrations connect TrackVia to the systems you already run.

Work anywhere. Mobile apps for iOS and Android capture the work with or without a signal and sync when the connection returns.

COMPARING FIELD SERVICE MANAGEMENT SOFTWARE?

TrackVia handles dispatch and scheduling, and it also covers work orders, inspections, assets, inventory, crews, safety, and maintenance in one system.

500M+

operational records managed

3,000+

production applications

15,000+

monthly active users

99.99%+

uptime across commercial, government, and HIPAA environments

Ready to see it in your operation?

Visit trackvia.com to talk with our team. And share "Five Best Practices to Cut Costs, Finish Faster, and Reduce Risk" with your CFO or owner, so you are both looking at the same picture.

About TrackVia Field Operations Research TrackVia Field Operations Research is our review of how TrackVia customers use the platform. This October 2026 edition covers 250+ customers with at least one documented workflow or business process. Industries are shown only where there are a large enough sample to provide clear direction. Scheduling and field inspection are the most common pair, used together by 20 customers. **Sources** Limble, State of Maintenance report (686 U.S. maintenance and operations professionals), as reported by Manufacturing Dive, October 8, 2026, TrackVia Field Operations Research, October 2026 (250+ TrackVia customers with documented use cases; 31 customers with documented pre-TrackVia challenges). TrackVia customer results are based on public case studies and approved customer information.