

# Your Guide to Digitizing Field Operations

Transform work performed in the field with  
mobile technology



Are you still using paper and pens to conduct field inspections or manage and document work performed by employees outside of your office? If so, you aren't alone. In fact, 35% of organizations still rely on antiquated paper-based or manual processes for field service management today.<sup>1</sup> Not only are hand-written notes and data prone to human error, these manual processes are also time- and labor-intensive, often leading to lost revenues and increased operational costs. The length of time it takes to identify an issue, report it back to stakeholders at the back-office and rectify the situation can cause considerable delay and expense. Furthermore, this gap in information and coordination can often also create undesirable issues for your customers and vendors.

Today, leading companies are embracing technologies that can help them better manage and streamline their field work, data and processes, without compromising safety and security. They see mobile field service and inspection software as one of the technologies that can help them save time and money while reducing the risk of errors.

Mobile devices, such as smartphones or tablets, are finding their way into the hands of field employees and helping firms do their site inspections and field work in a more efficient and cost-effective way. Mobile technology eliminates the need to capture information on paper documents, transfer it to a spreadsheet or database and store it in various formats in different systems. Using a combination of a mobile device and an easy-to-use mobile field work management application, an employee can now gather data, scan barcodes, add photos, capture geo-location data and more, thereby instantly synchronizing and streamlining back-office operations and field work as they take place. This type of efficiency accelerates the delivery of business information, plus it improves collaboration and overall responsiveness.



## CHALLENGES POSED BY MANUAL FIELD OPERATIONS

Manual processes and workflows used to support field work are fraught with challenges that inhibit the agility and flexibility that is needed in today's competitive marketplace. These challenges include:

### LACK OF VISIBILITY

Manual or varying field processes across sites and geographies make it difficult to achieve consistent results and quality, manage dispersed or complex field operations and report on critical data in a centralized and real-time manner. Without visibility into operations, organizations often struggle to achieve maximum efficiency and performance.

1. [http://v1.aberdeen.com/launch/report/research\\_report/11000-RR-mission-critical-mobility.asp](http://v1.aberdeen.com/launch/report/research_report/11000-RR-mission-critical-mobility.asp)

## **WASTED TIME & RESOURCES**

Paper-based or manual methods of tracking field work make it difficult to achieve goals and key performance indicators set by management in a responsive, efficient and uniform manner. Time is often wasted searching for data or waiting for reports, both at the office and in the field.

## **INACCURATE REPORTING**

Field data collection is often a slow, manual process involving error-prone paper. This captured information also often tends to then be hand-entered into spreadsheets and stored in disparate formats on incompatible systems, which can lead to errors, poor work quality, decisions or investments made based on bad data, delayed response times and lack of real-time visibility.

## **UNINFORMED DECISION MAKING**

A lack of actionable, timely data to drive decision making impacts the ability to manage orders, plan and schedule field work, maintain a high quality of service, avoid unanticipated costs, supervise the mobile workforce and increase customer satisfaction.

## **BENEFITS OF DIGITIZING FIELD WORK**

Mobile technology is quickly becoming a welcome addition in the field. Imagine that you are performing a site inspection during an audit. When you enter information on your mobile device, it is instantly centralized and analyzed—providing instant visibility and actionable data across the organization. If inspectors at two remote locations are reporting the same issues, the back-office team can instantaneously access the reports and take quick corrective action, potentially averting operational disruptions and saving money.

When you use mobile inspection technology, you can look forward to these benefits:

### **IMPROVED PRODUCTIVITY**

The use of mobile technology can transform field service management by simplifying and streamlining complex processes that involve employees in multiple locations. Automation and workflow capabilities free up time that employees can spend on important work, rather than administrative tasks or data entry. Also, real-time access to data and reports translates into more informed decision-making when and where it is needed, thus improving overall collaboration and coordination.

### **INCREASED RESPONSIVENESS**

Mobile applications provide greater efficiency in transferring data from the field to stakeholders, leading to faster resolution of problems as they arise. In fact, organizations that employ mobility saw a 10% decrease in time to decision in the past year.<sup>2</sup>

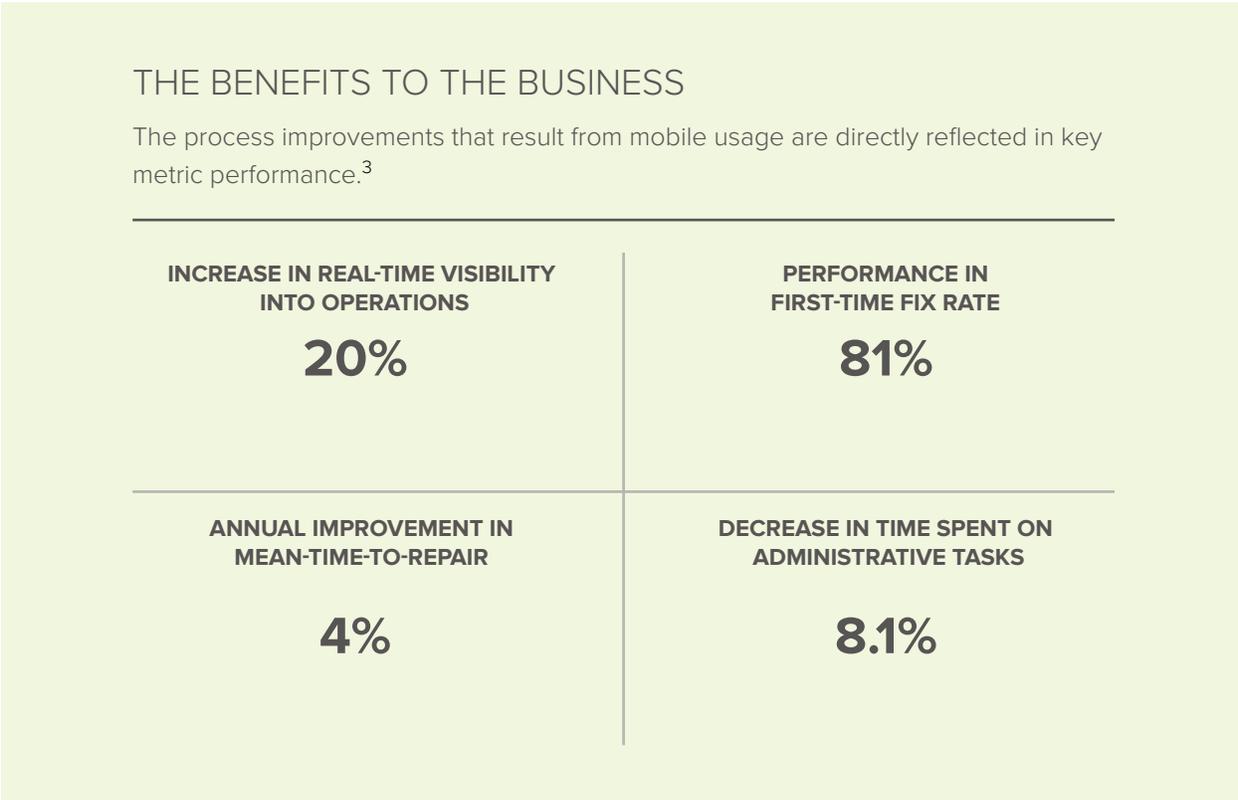
2. <http://blogs.aberdeen.com/aberdeen-group/mobility-in-manufacturing-moving-beyond-monitoring/#sthash.p9AcTqtg.dpuf>

**IMPROVED WORK QUALITY**

Off-site auditing and operations supported by mobile inspection technology provides better integrity of information and standardization across multiple locations—ensuring that both data collected and processes followed are consistent throughout the enterprise. This capability reduces the chance of human error, resulting in higher quality performance and lower cost-of-service delivery.

**ADVANCED COMPETITIVE ADVANTAGE**

Operational advantages derived from mobile-enabled field work and inspections help accelerate time to market, control costs and provide capabilities that improve the customer experience—resulting in key competitive benefits for your business.



3. [http://v1.aberdeen.com/launch/report/research\\_report/11000-RR-mission-critical-mobility.asp](http://v1.aberdeen.com/launch/report/research_report/11000-RR-mission-critical-mobility.asp)

# 4 TIPS FOR SUCCESS

Recent advances in mobile technology have made smartphones and tablets an indispensable workplace tool. But how do you go about implementing a mobile field work management solution for your organization? Here are four essential tips that will help you get started:

**TIP 1:** Embrace mobile solutions as an essential element to your overall business strategy. Learn all that you can about mobile capabilities and the different ways they can be deployed to help streamline your field operations.

**TIP 2:** Develop a strategy that is aligned with user needs, your business strategy and current mobile best practices. It is important for you to understand your organization's challenges, drivers and opportunities. Think about how mobile inspection solutions can change your operations and enable your organization to increase productivity and customer satisfaction.

**TIP 3:** Collaborate with stakeholders across your various functions to determine how a mobile field work and inspection solution can improve the way current operations are performed. Use cross-functional teams to develop requirements for a mobile experience that is aligned with your user and business needs.

**TIP 4:** Determine how you will measure the success of your mobile software deployment. Decide on when you will need to review results, what type of results will signify success, and any next steps that need to be taken based on the outcome.

If you are interested in accelerating your time to market, controlling costs, ensuring quality performance, and achieving a sustainable competitive advantage, mobile field service management technology can help you achieve your goals. Additionally, it can help you be more agile, responsive and profitable in today's marketplace.





TrackVia is a leading mobile work management software that can be fully configured to fit your unique field operations and processes.

TrackVia's detailed dashboards and live-data reporting give you enhanced visibility into your critical and complex operations and its unrivaled mobile capabilities make it easy for employees to enter data, scan barcodes, capture signatures, and collaborate on any iOS or Android device, even when offline.

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