

FIELD WORKFORCE AUTOMATION ISSUE BRIEF

Digital Proof of Delivery and Proof of Service Solutions

SMART CHANGE STARTS HERE.



Does your business depend on work completed in the field to generate revenue?

Is your field staff dependent on up-to-date information to complete their tasks properly?

If anywhere along this value chain your business relies on paper-based, manual processes, you could be missing an opportunity to speed your order-to-cash cycle as well as deliver an improved customer experience.

In an increasingly digitally connected world, people now expect the kind of convenience, speed, and efficiency that has been made possible by digital communications. If too much time goes by between delivery and billing, problems could arise, not only in terms of the customer experience but in terms of the company's cash flow.

It's a standard that a paper-based management system will always struggle to meet.

The challenge of navigating field workforce complexities.

There are many external factors that make delivery and field service organizations difficult entities to manage effectively.

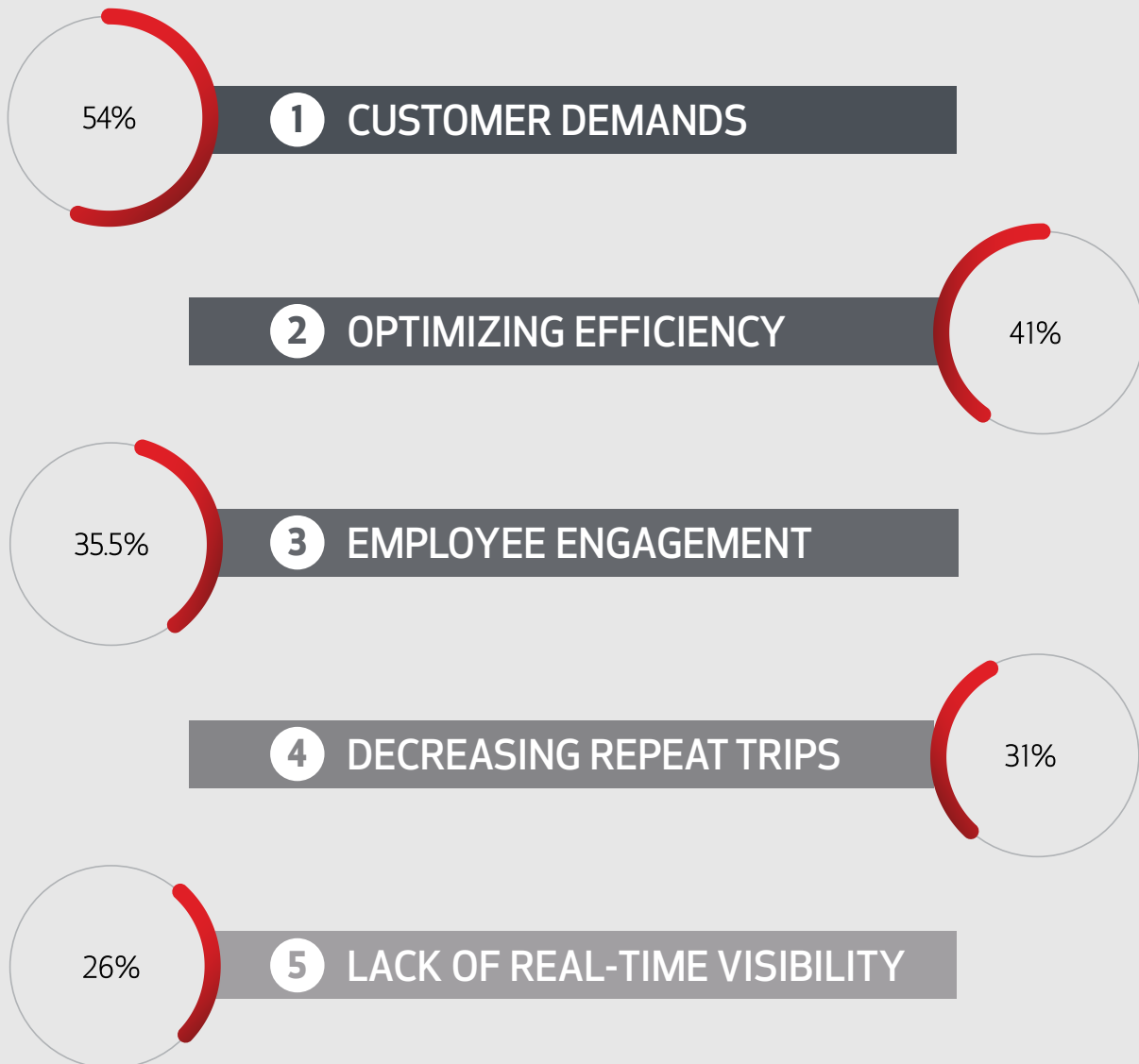
Uneven demand, seasonal and weather related fluctuations, a widely dispersed workforce, hiring, training, and retaining quality employees all contribute to field workforce management complexities.

Additionally, customer demands and expectations are at an all-time high given their exposure to services from

companies such as Amazon™, Uber™, and Netflix® which provide a convenient, seamless experience. Customers want more immediate service, visibility into arrival times, and real-time delivery/service status updates. Not to mention they are looking for the best value through lower costs and faster service.

A survey conducted by Field Technologies Online of field service organizations revealed these top 5 challenges.

THE TOP 5 CHALLENGES OF FIELD SERVICE ORGANIZATIONS*



COMMON PAPER-BASED PROOF OF DELIVERY/SERVICE ISSUES



Missing Documents and Signatures

Lost documents, incomplete information, or missing signatures can lead to invoicing delays and customer disputes. This affects the ability to collect receivables — a difficult and frustrating task for all parties involved.



Excessive Time Consumption

Manual workflow and communication cycles have built-in inefficiencies. It takes time to move paper manually through an organization and handling exceptions is burdensome. Field personnel not having access to the latest customer information or service documentation can cause on-site delays or return visits.



Inefficient Use of Resources

Creating transactional documents requires printers, paper, and toner. Converting paper documents to digital files requires scanners and staff. Storing paper documents can take up valuable space and time to search and retrieve information.



Opportunities for Errors

Reliance on paper transactions leaves you at risk of losing or not receiving important information in a variety of ways:

- Printed orders can get lost on the way to the warehouse.
- Drivers can misplace orders either going to the customer or returning to the warehouse.
- Changes to orders or other written information can be illegible or incorrect.
- Invoices can get lost, delaying payments for orders.
- Documents can get damaged at any point.
- Manual processes also introduce security and non-compliance risks.

If any of these sound familiar it may be time to start realizing the significant benefits that a digitally optimized field solution can deliver.



THE SOLUTION: FIELD WORKFORCE AUTOMATION

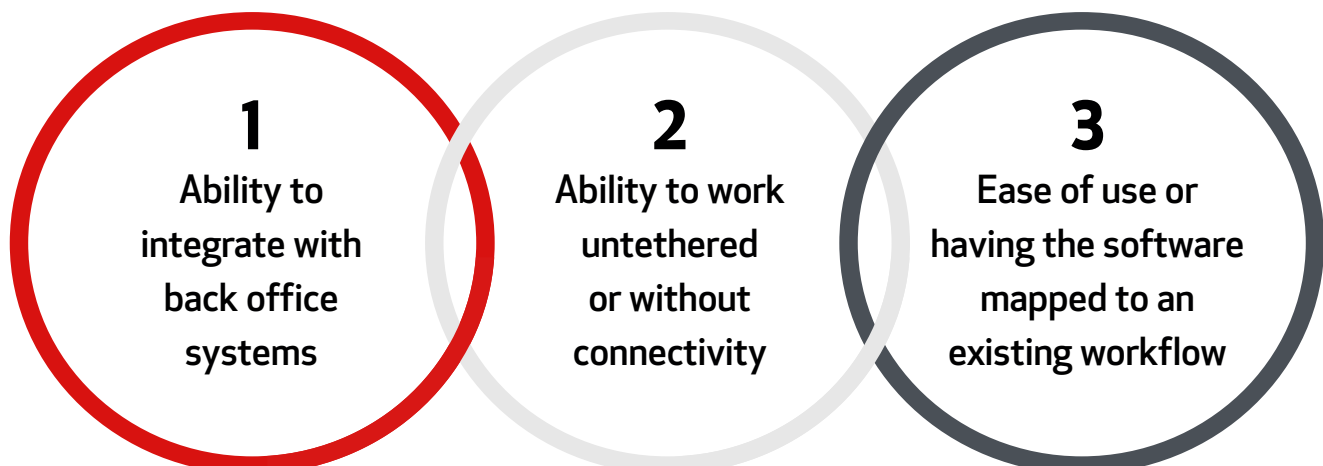
Managing data directly in the field via a mobile app or tablet gives mobile workers access to current customer information, service documentation, and their schedule at all times. The ability to collect information on-site and communicate with the home office, in real-time, speeds up transactions and delivers a positive customer service experience. Some key benefits of an automated field workforce solution include:

- **Enhanced Integrity:** Manual processes often lead to errors. Paper documents may be illegible, lost, or damaged. This could significantly impact the accuracy and timeliness of billing as well as the overall customer experience. Information captured digitally, in real time, directly in the field can help to improve process integrity and security. Once it's in the system, it's possible to enable security and access privileges.
- **Improved Accessibility:** Giving field personnel access to the most current customer information while on-site is paramount to delivering optimal customer service. Without having to rely on transporting physical documents to and from

the home office, job related data such as signatures, notes, and photos, is automatically collected and instantly made accessible to managers and administrators. This provides greater transparency each step of the way for both the company and the customer.

- **Automation:** Once the information has been captured digitally, there's no need to stop there. It is now much easier to automatically trigger the next steps and automate a workflow, such as sending a confirmation notice, a correction, or an invoice to a customer. The information gathered in the field can also be automatically corrected and imported directly into company systems, which again helps provide greater integrity of the information.
- **Systems Integration:** Enhance the functionality of your current software investments. By integrating intelligent information management directly with your line of business or ERP applications, your staff is free to focus on their work rather than manually entering data or searching for documents.

The Top 3 Software Selection Criteria*



FOCUS ON THE JOB, NOT THE PAPERWORK

A paperless approach minimizes the amount of time those out on the road spend doing administrative tasks. These benefits are related mainly to the productivity and efficiency of service delivery companies, but the customer experience is enhanced as well. So there's a double advantage for companies digitally transforming their field operations.

MOBILIZE YOUR PROOF OF SERVICE

Close the loop—accept customer signatures in the field to simplify customer interaction and billing.

Customers want a quick and simple transaction experience with your field workforce—approve, sign off, and receive a notice of confirmation.

Proof of delivery and proof of service capabilities make it easy for your team to provide that experience with a powerful connected mobile app that presents proof of delivery and/or a summary of work performed, including labor, parts, tasks, pricing, and more, with customer sign-off.

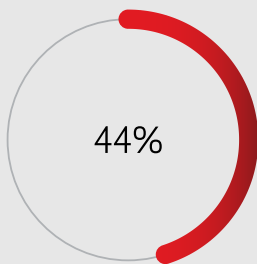
- **Present customers with a clear summary of work performed on your mobile device.**
- **Accept customer signature approval for invoicing.**
- **Eliminate back office data entry.**
- **Clarify billing authorization ambiguity.**

These solutions are not just applicable for large organizations. Digital field workforce solutions are designed to be modular and scalable for small and medium-sized businesses, so capabilities can be added as business needs dictate.

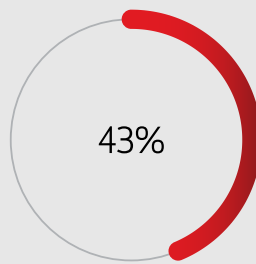


THE TOP 5 NEW INVESTMENT CONSIDERATIONS FOR 2019*

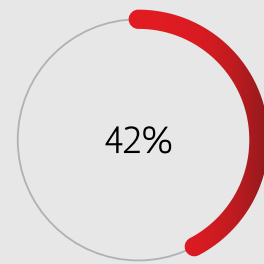
1 NEW MOBILE HARDWARE



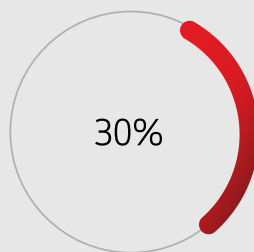
2 FIELD SERVICE SOFTWARE



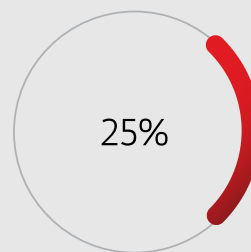
3 MOBILE APPS



4 MOBILE SECURITY



5 FLEET MANAGEMENT/TELEMATICS SOLUTIONS



The impact of paper-based, manual processes on your business: Manual processes, by their nature, increase the chance for processing and workflow errors. Inefficiencies associated with manual processes put customer loyalty—and your bottom line—in jeopardy. They can negatively affect your organization in several ways:



A higher cost of doing business:

Manual processes are expensive. Besides actual paper costs, you must also calculate the total cost of overhead associated with employees who are managing, scanning, imaging, and storing paper.



Little to no real-time operational visibility:

Data associated with paper-based processes is not immediately available to employees when they need it. This prevents them from providing customers with real-time updates on arrival times, or quickly supplying a clean invoice for a product or service.



Time-intensive problem resolution:

Manual processes used to record overages, shortages, and damages (OS&D), confirm deliveries, and handle invoicing are a constant source of errors that sidetrack your operations. They contribute to greater overhead costs due to the additional time and resources needed to address them.



Extending days sales outstanding:

Your revenue stream is reliant on work performed in the field. Extended time for manual data entry, invoicing, and dispute resolution has a direct impact on days sales outstanding.


IN SUMMARY

By embracing true digital transformation, companies can address the ineffective, inefficient, and inconsistent internal processes holding the organization back from many of their stated priorities. Priorities such as process automation, remote access to vital content, greater visibility of field operations, and better utilization of data are all strategic initiatives which can be realized through thoughtful implementation of technology.

These strategies can lead to an enhanced customer experience, which is ultimately the most critical step towards improving customer loyalty and retention.

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