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Unleashing the Power of Visibility



Key Takeaways

Improving visibility across your field service operations can drive both quantitative and qualitative benefits

It may not always be apparent that your field service operations are suffering from impaired visibility, so it's a good idea to check for some of the most common symptoms

Without the right kind of software functionality (such as no-code customization), it may be impossible to act on the insights created by increasing visibility, so you may also want to update your overall field service solution

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The Path to Improved Visibility

Something that's on almost everybody's wish list for their field service management software is improving visibility. But when you ask them to unpack exactly what the word "visibility" means to them, you get many different definitions.

To some people, having better visibility means having better analytics capabilities – maybe even in real time. For others, it means having a snapshot of your overall operations available on tap – who's doing what (and where and when), what's the status of your assets, inventory, and other equipment, what kind of external circumstances (such as traffic or extreme weather) might affect your operations, and so forth. Some are more interested in the inputs (like people, equipment, weather, and traffic) while others are more focused on outputs (like productivity metrics, customer satisfaction, and SLA compliance).

Whatever your goals are for improving your visibility, the path to getting those results will follow along the following steps:

- Avoiding the invisible flaw of visibility
- Identifying the symptoms of impaired visibility
- Articulating your objectives for better visibility
- Leveraging all the potential benefits

Avoiding the Letdown

Spoiler alert: We're going to jump ahead on the path to improving your visibility to one of the final steps in the journey. Why? Because one of the most frequently misunderstood aspects of visibility is figuring out how to actually leverage it. In fact, when you improve your overall visibility, you may also uncover a fatal flaw lurking in your field service software that was, up until now, invisible.

It's a little like the proverbial dog that's always chasing cars and, one day, finally catches one. Now what? He can't drive it, can't eat it, can't share photos of his victory on Instagram. As it turns out, there just isn't going to be much of a payoff for his efforts.

Likewise, there's often a disconnect that gets lost in the quest for visibility. Here's the "catch": Unless you have the ability to act on the information you're surfacing as a result of improving your visibility, you're probably not going to move the needle on your ultimate goals very much. And field service operations can find themselves trapped by any number of constraints that prevent them from taking meaningful actions based on these new insights.

What kind of constraints? There are two common constraints that can prevent you from acting on improvements in your overall visibility across your operations - one is the inability to change or fix workflows, the other is catering to a single stakeholder.

If You Can't Fix It, It's Still Broke

One of the most widespread constraints is the difficulty of making even simple changes to your workflows. Here's a simple example: Your field technicians may be presented with many options to consider before identifying one as the best description of the equipment involved in the task they're working on; as soon as they see a match, they can select that one and move on.

As a result of your better understanding of what's going on in the field, you realize that the most common choice is the one you happen to present as the last item on the list. The upshot is that your field techs will almost always wind up having to scroll past pages and pages of unnecessary information before finally getting to the item that should really be the first one presented to them so they can move along more quickly.

Unfortunately, making that simple change – adjusting the order of items in a list – often requires an expensive and time-consuming change order in your software. What should be a quick improvement can easily be something you know you'll wind up never doing.

In other words, visibility by itself often winds up being nothing more than a painful reminder of everything that you'd like to change about how you manage your operation, but are unable to change.

One way to avoid being frustrated when you do manage to improve your visibility but find yourself unable to act on any of the insights it brings is to make sure your field service software solutions are delivered in an environment that supports no-code customization. When you can easily add, delete, update, reorder, and experiment with new workflows – implementing changes in real time without getting bogged down by delays, costs, or time-consuming approval cycles – then you can fully harness the benefits of improved visibility.

Democratizing Visibility

The value of heightened visibility can also be thwarted if you've only factored in the needs of one type of stakeholder. The pursuit of improved visibility is often a goal raised by management and backoffice personnel who need a better understanding of what's going on in the field. The thinking is that if you can't be in all places at all times, you can at least try to have a view into "everything everywhere all at once."

But, as the movie by that name suggests, that's easier said than done. Even when you have all the information, you may not have the right context or perspective to fully appreciate what's going on in all those various corners of your "multiverse." Or it may be challenging to figure out the best next steps to take based on the inputs you're getting.

On the other hand, the techs out in the field might find that information more meaningful and actionable than backoffice personnel. They may also have insights about what additional information would help them get the job done as effectively and efficiently as possible.

To get past the barriers created when the benefits of improved visibility are funneled into one stakeholder role, a field service solution should be designed to share appropriate information and insights to all stakeholders, whether they're in the backoffice or working on mobile devices in the field. That doesn't mean providing all data to all people, of course. That wouldn't be appropriate and generally isn't very useful. But it does mean thinking about ways that the information flowing through your environment could potentially benefit each different role in your operation.

Recognizing the Symptoms

Now that we've peeked ahead at the end of the journey to flag a few of the most common traps that can wind up undermining the quest for visibility, let's hop back to the start of the journey. The starting point is typically when you recognize and diagnose your symptoms of impaired visibility.

That's not always easy. If you wear glasses (or know somebody who does), this scenario might sound familiar: You're not aware of any particular problem, but everything just seems a little bit off. Maybe you feel a little disoriented, or like you're moving through your day in slow motion. And at some point, you happen to notice that...you really need to clean your glasses.

You'd been suffering from low visibility all day. But the problem never registered as having anything to do with a problem with your vision. Maybe you thought you were coming down with something, or just didn't sleep well. Was it something you ate? Nope; you just needed to get rid of those smudges that you didn't realize were throwing you off your game.

When you're suffering from reduced organizational visibility, the symptoms can manifest themselves in a similarly imperceptible way. It's sometimes hard to identify low visibility as the culprit. But once you stumble across the idea – like noticing that your glasses really need a cleaning – it's obvious what's been holding you back.

Some of the symptoms you might experience in a low- visibility environment include the following:

- Basic tasks like scheduling and dispatching take longer than they should, need to be revised frequently, or result in frustration among those affected by the outcomes

- You're seeing deterioration of key metrics with no obvious cause. This can include metrics that arise within the field service operation (such as an increase in the average number of truck rolls per incident) or field service performance may find itself affected by issues that arise elsewhere in the enterprise.

- You may also experience a decline in metrics that reflect broader organization issues, such as an increase in turnover. For example, as visibility declines, this can contribute to reduced morale, as most people dislike working without access to the information they need to do work they can be proud of. And that in turn can result in everything from more workplace errors to more people exiting the company.

Clarifying the Goal

Once you recognize the symptoms of impaired visibility and understand the overall context of the kind of field service solution that will be needed to leverage improvements in your visibility, the next step is another straightforward – but often overlooked – step in the journey: Articulate precisely what you mean by the term visibility.

What exactly does the notion of "visibility" mean? Sometimes it means having access to something like the "God View" functionality available in some video games (or, more notoriously, in some ride-sharing services). This type of visibility provides a view into every activity going on in your system at all times. It provides you with a lot of information, but it isn't necessarily the most useful way to view the world. Sometimes the most valuable form of visibility is much more selective – providing you with a view of more focused information that answers specific questions you have at the moment. Instead of a map filled with dozens (or hundreds, or thousands) of moving targets, think of a "Magic 8-Ball" with a single answer to a single question (and without any of those annoying useless answers like "Reply hazy, try again" or "Better not tell you now").

That doesn't necessarily mean that every end-user automatically has access to all of the information – it just means that the tools can provide whatever information you've determined are appropriate and useful to various groups of end users. When visibility operates as a one-way street, that inevitably creates bottlenecks. Everybody who needs any information needs to request it from the same all-seeing eye that has exclusive access to any and all information about what's going on. That's rarely a sustainable situation. At the very least, it inevitably slows things down and creates a drag on performance. At worst, it's a recipe for chaos, confusion, and downtime.

Ultimately, your goal for visibility across your field service operation should be to empower everybody with real-time access to the specific real-time information that will be useful and appropriate for each stakeholder in the organization. And that information should be coupled with analysis and recommendations that help to guide the actions taken as a result of what you're seeing across the operation. In short, visibility is one of the keys to creating a high-performance culture in your field service organization.

When you're thinking about defining goals for improving visibility, think in terms of achieving greater visibility ***across*** your field service operation, rather than visibility ***into*** your operation. Visibility is different from monitoring or surveillance – those terms suggest that, for example, a coordinator is keeping tabs on several field teams. But visibility is a reciprocal operation. Field crews also need visibility about what's going on – indicators about the status of various systems, information about the availability of parts or specialist personnel, integrated inputs about external factors such as weather and traffic that could affect operations, and so forth.

By reducing bottlenecks and driving more informed decision making, better visibility for everybody in the enterprise translates into better performance metrics. It also has an impact on "soft factors" such as employee morale and providing ongoing feedback and learnings that boost skills and expertise.

What Visibility Can Do for You

You probably have some specific objectives for improving your overall visibility. But you may also be able to reap some additional benefits, even if they weren't the initial drivers behind your pursuit of improved visibility. Here are some of the benefits you may want to consider:

Quantitative Benefits of Improved Visibility

If diminished visibility is causing any of these issues in your organization, improving the overall level of visibility can often alleviate these symptoms. And even if you're not aware of any acute visibility-related problems, enhancing the visibility across your organization can result in several improvements, including:

- Increased service quality, as measured by metrics such as
  - SLA improvements
  - Mean time to resolution
  - First-time fix rate
- Enhancements in technician productivity, including
  - Travel time
  - Job time
- Overall efficiency measures, including
  - Fleet mileage
  - Contract leakage

Many of these performance metrics are, ultimately, proxies for customer satisfaction. Uptime and meeting SLA targets are often shorthands for measuring whether or not you have happy customers. If uptime remains steady (and high), that doesn't ensure that you have happy customers – but if uptime regularly turns into downtime, that pretty much ensures that you won't.

The impact of improved visibility drives better outcomes on big decisions that involve large numbers of people or big-ticket expenditures. But it can also benefit your organization by making an impact on a series of small incremental improvements. And even these improvements in relatively modest day-to-day activities can help drive better recommendations and outcomes, and speed up decision-making throughout your operation.

Here's a simple example: A technician at the worksite diagnoses a problem that requires a replacement part. She happens to have a $500 part on her truck that could be used as the replacement part, although a different part – one that only costs $50 – could also be used. She could make a special trip to pick up that less expensive part, or the repair could be rescheduled to a future date when a different technician already scheduled to be at that worksite could bring the part along. To make the right decision, the technician needs a few answers: What's the cost of prolonged downtime? How long would it take to pick up the cheaper part? When is the soonest date that a technician will again be at this particular worksite? Once installed, would it be easy to swap out the more expensive part for a less expensive one at a later date?

With insights into these kinds of details, she can immediately make an informed recommendation to the dispatcher about whether or not it makes sense to go ahead and make the repair using the more expensive part. Without immediate access to that kind of information, she can either make an uninformed guess or she can relay the information and wait for a response that might take hours or days.

Qualitative Benefits of Improved Visibility

Most KPIs measure your deliverables to customers, or the impact your work has on the organization's bottom line. What they don't always measure are factors like employee satisfaction. Are the junior members of your team receiving the kind of support and continuous feedback they'll need to become excellent senior members of your team? Do they have a sense of accomplishment and satisfaction with their work? When they suggest ideas for improving workflows to improve productivity, are these ideas welcomed and appreciated – or immediately discounted as impractical?

Improved visibility is a critical step toward creating an environment in which new ideas – whether top down or bottom up – are more likely to arise and more likely to be taken seriously and valued. And that has ripple effects that help drive employee satisfaction and retention which, in turn, can drive improvements in customer satisfaction and retention.

An Essential Part of Your Next Field Service Solution

Visibility problems can have substantial negative consequences on field service operations. The impact can creep up quietly and silently without anybody noticing.

Fortunately, the symptoms of reduced visibility challenges are easy to identify and straightforward to remedy. Intelligent field service automation solutions can quickly help to improve visibility and leverage it by:

- Facilitating the creation of mobile applications
- Providing powerful dashboards and other information displays for all stakeholders, providing different users (backoffice, field techs, customers, etc.) with different ways to view every angle of your operation
- Offering easy ways to quickly build, customize, and update applications using elements that are specific to field service
- Creating solutions that can be deployed quickly with a rapid return on investment while, at the same time, future-proofing your operations

With Zinier's robust intelligent field service platform, improvements in visibility are just the first step. Zinier's solution offers many additional benefits that help you turn insights into action, such as:

- Streamlining the process of customizing and updating workflows with its environment for no-code customization

- Providing backward compatibility with your existing legacy applications and point solutions as well as forward compatibility with emerging technologies such as its AI-driven recommendation capabilities

- Analyzing data in real-time and comparing current data against historical trends to instantly surface opportunities to deliver operational insights that drive improvement

- Identifying problems before they disrupt service, so that you can take proactive measures before they turn into crises

By helping members of your team pinpoint areas that need attention (coupled with the ability to provide real-time recommendations), you'll quickly learn to appreciate your new superpower of visibility, an indispensable component of a robust field service automation solution.

Deskless Productivity Starts with Zinier.

Zinier is committed to the success of the world's deskless workers. Our suite of products help field service organizations install and maintain critical assets and equipment in the field.

Our web and mobile app experience automates key backoffice tasks, provides technicians a seamless way to record their work in the field, and improves the end customer experience.

Through our no-code capabilities, we provide the best of both worlds: value-rich off-the-shelf software products and the ability to customize any field execution workflow to meet current and future business process needs.

Contact us

hello@zinier.com | www.zinier.com

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