30 Days to a More Productive Field Service Team

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For many people (and organizations), there's no better time to adjust habits and processes with an eye toward productivity than now. If not now, then when? In field service organization work, things are no different -- even if your budgeting and operations plans are in place, it's always good to revisit some key areas and think about how to increase your productivity and effectiveness.

To make it easier, and because the human brain loves 'chunking' (grouping together pieces of information), we wanted to design a four-week plan for you. In short:

30 Days to a More Productive Field Service Team

We'll lay this out week-by-week, but please remember any attempts at increased productivity, effectiveness, or revenue are always ongoing. Once you master certain aspects, you need to make them consistent habits throughout your team -- or else they will fade away and less-desirable, older practices might crop up in their place.

Finally, the building blocks of an effective field service team can be built in four weeks, but in general it's an evolution -- it will take time to see amazing results -- as opposed to a revolution.

Week 1 — Planning and Brainstorming

You can't begin a process without clarity on the priorities needed for the process, so Week 1 is all about taking stock of the past and outlining ideas for the future.

There are numerous ways to generate ideas from your organization, but here are some guiding questions:

- What goals did we set and miss in the past?
- Why did we miss those goals?
- What is most important to our work culture?
- What is most important to our bottom line?
- How can we maximize our internal culture?
- How can we get the most out of our bottom line and revenue stream?
- What can be achieved with the current in-house resources?
- What needs to be hired on or bought?
- What do we want to be able to say about our team and our finances?
- How will we measure success?

The answers to questions like these -- and others you generate -- can be grouped into different categories, such as:

- Internal Culture
- Business Operations
- Revenue and Profits
- Hiring and Recruiting
- Capital Expenditures
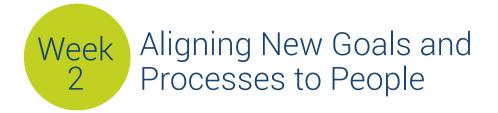- Big Ideas
- Day-to-Day Ideas

At this point, you encounter two crucial steps:

- Someone in your team must *own* this process.
- Any goals you decide on must be measurable.

That first bullet simply means someone needs to keep track of notes, discussions, goals, and outcomes so that people can access them later.

That second bullet is crucial, because measurability is often the key to (a) growth and (b) sticking to goals. Rather than saying something like "We're going to be a better company!" (vague and not measurable), say something like "We want no more than three staff departures all year and 12 percent revenue growth!" (Both measurable). Specifics are good, because specifics can motivate -- whereas vague ideas can de-motivate (as in, "Oh, we're better than last year, so I guess we accomplished that one").

Week 2
Aligning New Goals and Processes to People

The most *ideal* situation is for Week 1 to occur in concert between management and employees -- i.e. the brainstorming and setting of goals takes place collaboratively -- but oftentimes those processes occur with senior management, and that's also fine.

Once the goals and processes for your field service team are set, though, now you need to communicate those down the chain and make sure the actual field service reps, the customer service team, and more understand what the goals are, how productivity can increase, and how their jobs relate to those goals.

The first step is *communication,* whether that's a series of e-mails, managerial trainings, a whole-staff meeting, or something else -- but the *most important step* here is management *modeling* the new behaviors and processes.

For example, if you set a new customer service practice in the interest of increased productivity and no one ever sees managers follow that practice, then eventually the practice will die.
This is a little bit like the children's game "Monkey See, Monkey Do." Many organizations are structured similarly, and if senior leadership isn't modeling the desired processes and goals, no one at the execution level will follow through either.

So by now, you've:

- Thought about the past
- Set new goals and processes toward increased productivity
- Made sure the goals are measurable
- Communicated the goals and processes to your staff and field service reps
- Continued to model their importance

Pat yourself on the back. You're halfway home.

Week 3 Operational Effectiveness

Hopefully you covered this in Week 1 (fingers crossed), but Week 3 -- while making sure your management and staff are on track with the goals and processes set up -- is a good time to begin focusing on operational effectiveness. Think along these lines:

- How are your existing customers accessing you?
- How are new customers finding you?
- Do your field service reps have everything they need when doing appointments?
- Have customers asked for paper receipts or trails often in the past year?
- What percentage of your traffic and access of the customer portal is from mobile?
- What are the pain points you've seen from customers in the past year?

These questions can lead you to rethink, or tweak, your basic field service processes. Here are some things we've worked with other clients on here at Optsy:

- Work Order Management
- Mobile Solutions
- Dispatching and Scheduling
- Mapping and Routing
- Service Agreements
- Account Management
- Inventory Management
- Equipment Tracking
- Reporting

If you'd be interested in working with us to improve your field service productivity, contact us at any time. We've worked with many field service organizations on increased effectiveness, productivity, and profit -- and we'd love to help you as well. Often a small change on the operations side can lead to a major change on the bottom line.

Week 4

Feedback Loops

One month *isn't* a long amount of time, no, but consider this stat:

> # 98%
> of employees will fail to be engaged when managers give little or no feedback

That's based on <u>research from here</u>, and it's long been proven that highly productive, income-generating companies tend to be better at soliciting employee feedback and using it to drive the organization forward. The opposite effect would be decisions and ideas only being clustered with senior management, and that can lead to high turnover in your organization -- which is not the goal.

So as you come into Week 4 on this productivity-and-revenue-increasing plan, have managers go speak to their employees and ask some questions:

- How do you feel things are going with the new goals and processes?
- What are the best elements?
- What are the pain points?
- How do you see your stakeholders (customers, field service reps, etc.) taking to it?
- Any stories about the processes, either good or bad?
- How would you suggest we tweak it based on how we started?

Just like you needed to show consistency and modeling above, so too do you need to at this stage. You need to gather feedback once a month from all tiers of your field service team. Remember: productivity processes are living and breathing. If you only evaluate them once a year in a vacuum, you won't see any growth from them. If you evaluate them consistently and consider tweaks, you'll do much better.

The caveat, of course, is that you don't want to change direction every single month. That will confuse and alienate your employees. So, when you gather this feedback each month, ask yourself these questions at a decision-making level:

- What are the 'small wins' here we could implement?
- What are capital-intensive changes we need to table or research?
- What are 'hidden flaws' that seem small now, but could really blow up our relationship with customers if not addressed?

If you use those three buckets -- small wins, big projects, and hidden flaws -- you should be able to prioritize what needs to be done next, why it needs to be done, and how the process of getting it done could begin.

At Week 4, now, you're well on your way to an effective, productive, revenue-generating field service team. And if you need additional help or resources, we're always here to help!