

Mobile Solution Whitepaper

Field Services and Support



Nowadays many workers are on the move and away-from-desk attending to day-to-day business issues. This often means that they have to get back to their desk before they can attend to a query. This could take a couple of hours or even days and no organisation can afford to keep its customers waiting that long.

MyMobility™ has solved this problem of getting knowledge to market quickly and effectively by putting your entire office onto a mobile device.

Our away-from-desk Mobile Solutions ensure that you're always available, allowing you to do business anywhere at anytime.

Executive Summary

Organisations across the globe are increasingly reliant on mobile access to information to enhance productivity, customer service and overall effectiveness.

Providing accurate information to away-from-desk workers means the ability to process an order, perform a lookup or complete a customer service request at the point of business activity, and this gives organisations a competitive edge.

This document focuses on the proven benefits offered by Mobile Solutions in the area of Field Service and Support.

Key focus areas:

- ❖ What are the traditional challenges and issues to overcome in Field Services
- ❖ What systems and processes have been implemented in the past to address these challenges

- ❖ How is technology playing a role in addressing these challenges

Mobile Field Services:

- ❖ Exploring benefits gained by mobile solutions in the field and at the customer face
- ❖ Exploring the impact of mobile solutions on administration processes and the back-office

The traditional approach to Field Services and Support

The challenge faced by most organisations is a sophisticated, unyielding 21st Century customer that wants, expects and deserves instant access to information – be it a quote, a service call or customer query. If customers' information needs aren't met, they simply move on to an organisation that can meet them.

- ❖ A service or support call is raised when a customer phones the company's support number to log a call.



If the call cannot be resolved over the phone, the company will need to dispatch a field worker to the customer site, and if this is not managed effectively the customer may be lost to a competitor.

The challenge

The service technician must prepare for the service call

- ❖ Relevant information about the call is gathered, typically at the office, by means of paper-based reports and forms
- ❖ The field worker generally returns back to base between calls, to collect new calls or additional information, products, or parts

Resource management

- ❖ Allocation of work to the correct person is usually ad-hoc according to who is available or a first-come-first-serve basis
- ❖ When all workers are on the road, the response time increases because the workers only get the call info when they return to the office

The on-site process

- ❖ A paper job-card is completed at the site, with a customer signature and a copy given to customer
- ❖ Stock control is very basic or not done at all due to manual processes, and the difficulty of tracking multiple serial numbers and product codes manually
- ❖ The quality of information captured at site is usually poor and the job-card may be incomplete, as this is left up to the field worker to decide what to capture at the site. Paper based processes make it difficult to control processes
- ❖ Cellular voice calls are a major overhead, as the field worker relies on phoning colleagues or the office to gather more information to solve a problem and to get new calls

The administration process

- ❖ The customer only gets a final bill after days or weeks, once the back-office processes have been completed
- ❖ Customer billing queries are commonplace due to lack of information on the job sheet and proof of what work was completed
- ❖ Basic customer relationship management (CRM) does not exist within field services, due to poor information flow and manual processes

The manual processes and inherent paper trail associated with the traditional approach to field service, results in wasted time and effort as data is recaptured and checked at each stage in the process, which ultimately adds up to poor and unpredictable service to the customer

The role of Mobile Solutions within Field Services and Support

Mobile Solutions provide instant access to information for away-from-desk workers. In the case of field services, the goal is to improve customer service and utilise the field force as efficiently as possible, by getting new service and support calls to the right field worker as quickly as possible; and getting accurate information from the field to the back-office on time.

The service technician must prepare for the service call

- ❖ With a mobile solution, the field worker is always available. New service calls, along with supporting data, is sent to him and accessible wherever (s)he may be
- ❖ If the field worker has a query while on site, additional information may be requested and downloaded directly to the mobile device, avoiding lengthy phone calls or return trips to the office
- ❖ Acceptance or rejection of the call is centrally monitored, ensuring that service levels are always maintained and an open call is automatically

escalated if it is not accepted or closed within a given timeframe



Resource management

- ❖ When the field workers are equipped with an always-available mobile solution, the back-office can more easily manage the utilization of resources, by driving work to the most appropriate person
- ❖ Location-based services such as GPS (global positioning) means the back-office knows the position of the field force at all times and therefore work may be automatically allocated to the most appropriate worker, based on proximity to the customer



The on-site process

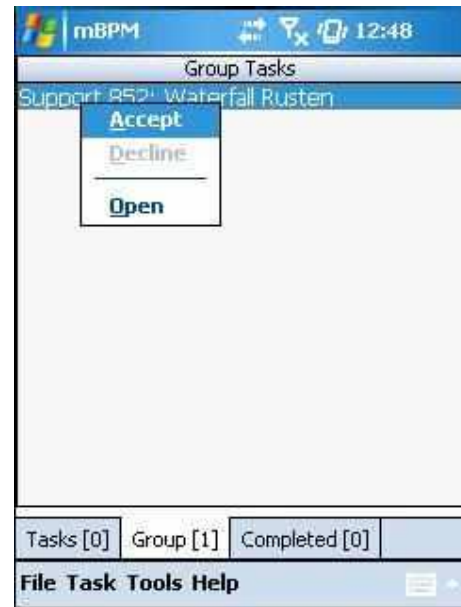
- ❖ All information relevant to the service call may be captured on the mobile device, including the complete Job card, with time billed, stock used, checklists completed, and finally a sign-off from customer (on the screen), effectively closing the Job Card on site

The always-available nature of the mobile solution means that the completed call information may be compiled into a document and emailed directly to the customer immediately the call is completed and an SMS notification may be dispatched to key personnel thanking them for their support.

- ❖ The mobile solution may enforce better processes such as stock control, by forcing the technician to track all parts and consumables used at customer site, before closing the Job Card

Administration before and after the service call

- ❖ A critical concern within field services is accurate invoicing of customers for the services that have been rendered, and ensuring that the job card and all associated information is accurate to resolve any billing queries timeously
- ❖ When the processes are in place for service companies to provide excellent service delivery to their customers, whilst backing up their service with accurate documentation, then customers keep returning

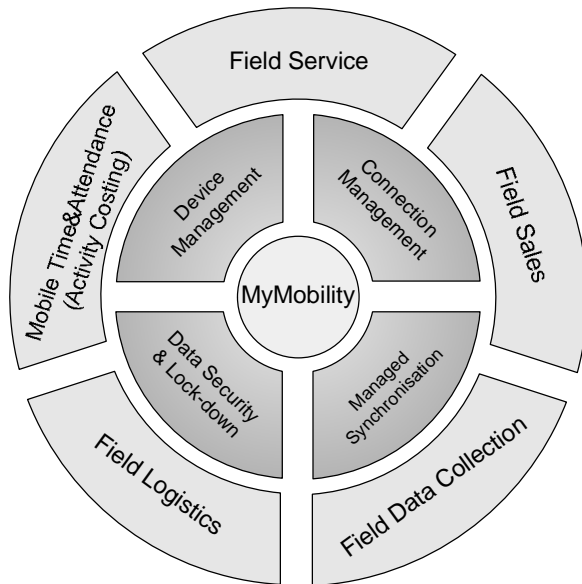


The result of using mobile solutions for field service and support operations:

Exemplary customer service: which ensures that existing customers are always satisfied, costs are reduced and revenues increase because customers want to do business with you.

The result is that organisation across the globe are starting to view Mobility as strategic, as opposed to opportunistic.

What constitutes an always-available Mobile Solution?



At the core of every mobile solution are the following critical components:

Connection management

- ❖ Mobile solutions should be always-available. In order to achieve this, the mobile worker should not be aware of breaks in network connectivity or changes in network coverage. Connection management ensures that the mobile solution operates whether the device is connected to the network ('live') or 'offline'.
- ❖ This is achieved by means of smart mobile hardware, which allows for the complete Mobile Solution to operate from the mobile device, and all information needed by the field worker is stored in a secure mobile database for instant access.

Device management

- ❖ The ability to remotely control both the mobile devices hardware and the installed software is paramount
- ❖ This ensures that mobile workers always receive updates and the organisation is alerted of faults, without the worker having to 'return to base'
- ❖ Updated software versions can be deployed to mobile devices over-the-air without bringing devices back to base

Data security

- ❖ Mobile devices contain large amounts of sensitive data and company IP, therefore security is critical
- ❖ Lock-down ensures that a device and all its data may be remotely deleted if lost or stolen, ensuring that the information is never compromised

Managed Synchronisation

- ❖ Information is automatically synchronised between the traditional line-of-business systems (eg. the help-desk or ERP system) and the mobile devices in the field, and the frequency of this communication process may be controlled centrally.
- ❖ The synchronisation process is hidden from the user and takes place by intelligently splitting the information into small packets, thus ensuring that the communication channel is never broken even in areas of poor or intermittent network coverage.
- ❖ The transparent and continuous synchronisation of information between the organisations central systems and the mobile workforce ensures that all processes including individual tasks and events within the workflow are maintained and closely monitored.

It is this rigorous monitoring and control of information flow as it extends seamlessly out to the field and into the back-office that offers a true competitive edge to the modern organisation.



MyMobility™ Profile

The fluid nature of business means that many of your key personnel – from executive to field worker – are on the move and away-from-desk attending to day-to-day business issues. This often means that they have to get back to their desk before they can attend to a query. This could take a couple of hours or even days and no organisation can afford to keep its customers waiting that long.

MyMobility™ has solved this problem of getting knowledge to market quickly and effectively by putting your entire office onto a mobile device. Our team has been passionate about Mobile Solutions since 1996.

Our away-from-desk Mobile Solutions ensures that you're always available, allowing you to do business anywhere at anytime.

Proven areas for Mobility:

- ❖ **Field Sales:** A salesperson needs to forecast, plan & report on sales calls. Mobile functionality typically includes the ability to lookup product information and process new sales orders or access customer order history, while in front of the customer, as well as integrate with existing CRM systems.
- ❖ **Field Service:** Service personnel need to forecast, plan & report on service calls. Mobile functionality typically includes the ability to access new tasks and any supporting information in order to close the task, and the ability to send completed tasks, job-cards or other field data back to the office
- ❖ **Mobile T&A Solution:** Manage and control Time and Attendance information better in any contracting or site environment, and ensure that labour is tightly controlled according to activities completed.

We reduce any organisations costs and increase their revenues in the following simple ways:

- ❖ Reduce or remove the paper trail
- ❖ Remove duplication of tasks
- ❖ Speed up administration processes in office
- ❖ Reduce cell phone voice calls
- ❖ Reduce wasted travel for workers
- ❖ Manage the mobile worker remotely
- ❖ Increase sales via mobile intelligence
- ❖ Answer customer queries on time
- ❖ Instant documentation after closing a service or sales call

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