



# The Ultimate Playbook:

Aligning and Optimizing Your  
Field-Based & In-Office Workforces



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# Introduction

A company's field workers, office staff, and management need to be on the same page – essentially, aligned on the overall plan and daily tasks – to optimize output. Company leaders must recognize that the in-office and field-based workforces have unique challenges which may hinder productivity and profitability. Resolving the respective operational issues can enhance the customer and employee experience. Here's the ultimate playbook to align and optimize field-based and in-office workflows.



# Unique Challenges of Office vs. Field Workforces

## ***Office Staff:***

Office staff face challenges related to disorganization or clutter in their work areas. Manual processes such as job scheduling, payroll and inventory management can cause paperwork to pile up and also require extensive data entry. When manually assigning jobs, available workers may be overlooked and job assignments may be incomplete. When manually inputting doing payroll or taking inventory, confusion, delays and inaccuracies can occur. Valuable time is then spent chasing down the correct (or missing) information and redoing reports. Plus, staff may accidentally order unneeded equipment and/or approve costly and unnecessary overtime.

## ***Field Workers:***

Field workers also face disorganization or clutter in the warehouse, in their vehicles, and/or at the job site. Paper forms and equipment may be in a state of disarray. Workers may receive job details on a sticky note or by looking at the bulletin board – without complete instructions. Employees may wait a long time for questions to be answered by management or office staff. Field workers' available capacity may be crippled by the need to travel to/from the office several times a day or week – dropping off paperwork, learning about their next assignment, clocking in/out, etc.

# Productivity Pain Points

Leaders need to examine four key areas to identify when/where/how/why productivity suffers when workforces actively work together:



**Communication:** *Keeping your overall workforce connected can be difficult across locations. Here are a few questions to help uncover potential issues:*

- How is intra-company communication currently conducted?
- How and when are project updates communicated by the field?
- How long does it take for individual or departmental requests to be addressed?
- What are the typical types of communications being shared?
- What caused communication breakdowns? What were the implications for the job assignment and the actual customer?

**Assess your current communication tools to evaluate if they're doing enough to further your company's productivity.**



**Scheduling:** *Whether receiving initial work orders or assigning them to your field employees, the job scheduling process is critical to your company's revenue. Here are a few questions to help uncover potential issues:*

- How is your office team accepting service requests from customers?
- How is your dispatcher assigning the requests?
- How is your dispatcher communicating the assignments to the field?
- What questions do your field employees typically have when receiving new assignments?
- Where are the scheduling and dispatching pitfalls and why? What are the implications for your top and bottom lines?

**Analyze your scheduling and dispatching processes to help you optimize all workers' output and even take on more jobs each week!**

Many companies realize that paper-based processes are a sore subject for both workforces. Although the actual processes may differ based on one's role, the disadvantages are largely the same: Time, money, and productivity are wasted. Manual processes are costly, slow, and may result in data gaps, inaccurate data, and lost documents.



**Customer Experience and Invoicing:** *Your company's customer experience is defined by every interaction a customer has with one of your employees and your brand. Whether office employees are talking to your customers on the phone, or field employees are interacting with customers in person, it is essential to ensure every experience is as seamless and efficient as possible. Here are a few questions to help uncover potential issues:*

- What is the customer experience when office employees are interacting via phone or email?
- What is the customer experience on your website?
- What is the customer experience when field workers are interacting on the job site?
- What is the customer experience at the conclusion of the project - including the invoicing and feedback stages?
- Where is the customer experience suffering and why? What are the implications for your company's reputation, customer loyalty, and referrals?

*Review the customer experience to help retain business and make customers happier from the start.*



**Inventory:** *Conducting inventory may require office- and field-based employees to search for needed parts or tools in order to resolve inaccuracies and prevent shrinkage. Here are a few questions to help uncover potential issues:*

- How is inventory currently conducted in your office and/or warehouse?
- How does a field worker prepare the materials needed before departing for an assignment?
- How is inventory conducted at the end of each workday?
- How is inventory conducted at the conclusion of each project?
- Where are shrinkage or data gaps occurring most often and why? What is the implication on your financials?

*Assess the inventory processes to ensure accuracy and timeliness.*

# Better Ways to Connect Your Office- and Field-Based Teams

Communication channels must be open and flowing – allowing guidance, answers, and support to be provided when questions or issues arise at a job site or at HQ. Project updates must be routinely shared – allowing colleagues and customers to remain informed and updated on the time and estimated expense. Timekeeping processes must be efficient and accurate – allowing the data to be reviewed and approved by managers regardless of the workers' locations. OT, PTO and PO requests must be uniform – allowing supervisors to approve the payroll expenses. And, employee behavior (whether at HQ, driving a company vehicle, or at a job site), must be reviewed – allowing supervisors to ensure that safety protocols are followed and equipment/vehicle/fuel usage meets established guidelines.

***Here are a few ways to better connect your overall workforce and optimize operations.***



**Mobile communication:** Digital messaging tools are key to keeping field and office workforces connected. If updates or additional clarification is needed, field employees can easily reach out to supervisors and office staff via mobile devices.



**Routine check-ins:** Tracking field employee positions during work hours can help office staff route the nearest available worker to a new job. Implementing frequent daily check-ins also helps your dispatchers better assess available capacity. Digital check-ins and GPS tracking will help prevent overbooking and allow dispatchers to inform customers of more accurate arrival and completion times.



**Digital documentation:** Submitting forms (e.g., timesheets, safety and compliance, material requests, mileage and fuel expenses, etc.) electronically from the field to the office helps drive faster (and more complete) data reporting while reducing the need for manual transport at the end of each workday or week. Supervisors and office admins can then review and approve the forms on demand before data is exchanged with invoicing, accounting, and payroll systems.



## What's Next for More Efficient Workflows

Auditing both your field- and office-based workflows regularly helps you avoid complacency and identify emerging issues which can “cost” time, money, and customer satisfaction. Keeping up with the latest technological trends in your industry helps you stay aware of new tools that benefit your workforce. Reviewing HR-related workflows (such as hiring, onboarding, training, and upskilling) can also identify opportunities to optimize office- and field-based workflows. Soliciting employee input may result in new ideas and also drive alignment on issues and solutions. Obtaining customer feedback will also help you uncover new ways to provide a seamless and successful customer experience.

## Conclusion

Optimizing key field- and office-based operations can increase productivity and profitability. Eliminating many manual processes will give your field and office workforces more time each day to serve and satisfy even more customers – helping boost productivity and profitability! Learn how our TeamWherx® solution can help optimize processes by requesting a free, custom demo.