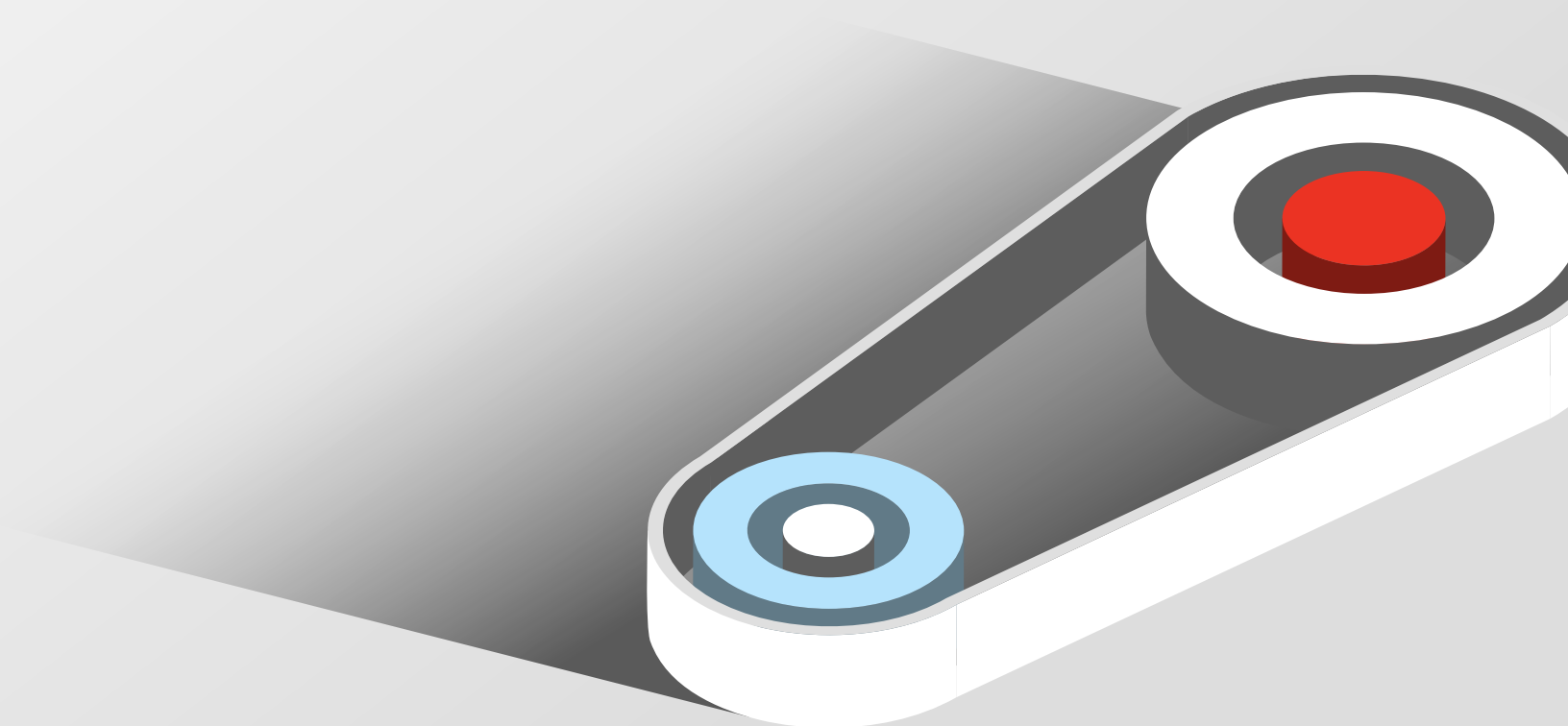




GUIDE

A Buyer's Guide to Mobile Inspection Software



How to choose a solution that improves your workflows today and can also adapt to the changing needs of your field organization.

So you've made the decision to stop using paper forms and modernize your mobile safety and inspection processes. Now what?

Taking a methodical approach to evaluating your options and choosing a solution will help ensure that you achieve the results you want, without hidden costs or maintenance hassles as your company's needs evolve.

There's a lot to consider, so let's get to it.



What to Look for

You'll want to take an analytical approach when considering your choices. Cost matters, of course, but making it the deciding (or only) factor can leave you with software that causes more problems than it solves.

For example, say you decide to go with fillable PDFs, because they're the least expensive option. You've solved the initial issue of cost, but are likely to spend more in the long run making up for the shortcomings of that particular format. (Data collected in fillable PDFs is neither easily shared nor validated, so you end up with the same problems you started with, plus one — you've wasted time and resources on a solution that doesn't do what you need it to.)

Software characteristics

In order for you to see real improvements, your safety and inspection software needs to do several things:

- ▶ Make safety and inspection processes simpler, more efficient, and ubiquitous.
- ▶ Make your safety and inspection data useful to more people once it's collected.
- ▶ Make the results of your processes clearer and more easily available.

In other words, your solution needs to simplify (and in other ways improve) how your teams approach safety and perform inspections. You want it to interfere with business operations as little as possible while showing the maximum amount of value.

So where do you start?

Data collection

Start with improved data collection and sharing capabilities. You want to find software that:

- ▶ Improves reliability and consistency. A mobile app that is deployed to your team members helps them go step-by-step through processes you need them to follow, even if you haven't been able to go over them in person.
- ▶ Gives you real-time updates. You can see what your teams are doing, without them having to conduct outreach to you via phone, text, or email.
- ▶ Augments documentation and evidence. When your employees are able to take photos, videos, or even audio recordings of their work in the field, it gives you a clearer picture of what they're doing and how well they're doing it. You don't have to be there in person to supervise.
- ▶ Increases both data quality and speed of collection. Data is propagated exactly as it has been entered. Dropdown lists, choice lists, classifications, and more can be made specific. No more transcription errors or struggling to decipher illegible handwriting.

- ▶ Ties in multimedia seamlessly. Because digital collection brings the data fields and the multimedia fields together into a single app, you don't have to do things like match up inspection records with photo or video filenames in a directory.
- ▶ Prevents lost data. Once the data is synced, there's no worry about spilled coffee obscuring a signature. The signature is captured and stored permanently, 100% auditable.
- ▶ Shows you where things are happening. Geotagged data not only provides further verification of where work was completed, it enables a faster response to safety incidents or other urgent situations.



Reports

Next, consider how you'll be using your inspection results. One of the major benefits to moving to safety and inspection software is the ability to turn around reports quickly and leverage that data faster.

Look for software that:

- ▶ Streamlines job reports. Instead of waiting for people to get back to the office to get the data, information can be synced anywhere there's cell or WiFi connectivity. Because the data is stored consistently, it's easy to create templates that enable your team to crank out reports as soon as the data is synced.
- ▶ Shares data easily. You want software that sends out emails or texts when certain conditions are met, kicking off workflows in other systems, or sharing data with external parties in forms that are easy for people to use (e.g., CSV for Excel) or for systems to consume (e.g., JSON), and that shares photos, video, and other content as easily as basic data.

“ One of the major benefits to moving to mobile inspection software is the ability to turn around reports quickly and leverage that data faster.

- ▶ Delivers metrics. Metrics are key to demonstrating the value of your safety and inspection program. By using the data you collect to improve on your safety and inspection processes — and to reduce the risk associated with your company's day-to-day work — you'll be able to directly affect your company's safety culture.

- ▶ Enables analytics. Modern analytics, especially AI, can consume immense amounts of data, and the more you can feed into it, the better. By piping data directly from your safety and inspection processes into business analytics in real time, you have the opportunity to make better decisions, faster.

Workflows

Finally, you want software you can leverage to improve workflows within and between departments, without code. Your safety and inspection software should automate processes wherever possible and integrate with enterprise systems to support enterprise business operations.

For example, if one of your vehicles fails an inspection, your fleet manager should be notified instantly to put the repair in motion and get your vehicle back in service as quickly as possible.

“ If all your mobile inspection software does is convert checklists into digital forms, it is going to severely limit your ability to grow the program.

You also want your fleet manager to be able to quickly identify trends if multiple vehicles fail inspection for the same reason, so they can be addressed proactively rather than waiting for a catastrophic failure to occur.

So, the right solution will entail flexibility that goes beyond simple checklists. Any safety and inspection program will require checklists, so you'll want to consider how your software handles them, and how easy it is to convert your current checklists into the software.



But if all your mobile inspection software does is convert checklists into digital forms (while that's a step in the right direction), it is going to severely limit your ability to grow the program.

For example, consider, again, converting your paper checklists into fillable PDFs.

It's a weak solution, because:

- ▶ It necessitates a laptop instead of a smaller, cheaper, more convenient smartphone or tablet
- ▶ It requires you to send the forms to a central location for tallying and adding into the database — which can introduce manual errors and slow response time
- ▶ It's hard to maintain, because fillable PDF isn't as intuitive as other data-oriented software

You want to be able to recreate checklists easily, but your solution will need more functionality than that. Checklists are table stakes, and you'll want — eventually, if not at first — to move toward something that behaves more like a fully featured mobile app than a digital checklist.

Process improvement

Finally, not only do you want to improve safety and quality, you want to improve your mobile inspection processes themselves. To accomplish that, your solution needs to:

- ▶ Make mobile inspection processes more ubiquitous, which means making them more accessible to more people. Giving people apps on the phones that they are already carrying is ideal. It should be simple, user-friendly, and easy to deploy, providing them with a quick and painless way to flag problems on an ad hoc basis.
- ▶ Capture and use information about the inspection process. For example: Where was the person when they collected the data? How long did it take them to complete the inspection? Did the inspection record require revision after it was completed?
- ▶ Make process improvement accessible, allowing non-programmers to create workflows that automate key processes, thereby ensuring greater consistency and fewer headaches for workers.
- ▶ Kick off processes in legacy systems and integrate with other critical IT infrastructure, whether it's GIS, Salesforce, or another SaaS application for data-driven automation.

You can see why fillable PDFs aren't going to cut it.

Software Platform Characteristics

People often think about the functions that software performs, leaving discussions of the platforms to the technologists. But savvy business people know about technology, and pay attention to certain things when they're buying software:

- ▶ **Cloud computing.** This is when the software is running on a computer that you don't own or manage. It may sound risky, but conceptually it's no different from putting your money in a bank that you don't own or manage. It lets you expand storage and computing capacity without buying new hardware, which provides the flexibility you'll need as your program grows. It also means you don't have to rely on IT to do database backups and security audits. You're basically outsourcing the most annoying, lowest-value IT functions to someone else.
- ▶ **Software-as-a-service (SaaS).** This is cloud, plus you are not managing the software, either. You're not only handing off the hardware/operating system/networking infrastructure, you're handing off the application itself. Not having to rely on IT to do upgrades, etc. makes life much easier. Your duties are limited to administering only the parts of the application that matter to you — who has what permissions, for example.
- ▶ **Configuration and customization skills needed.** Consider what it would cost to contract for the skills you need on the open market. If the software can be customized with code, does it require you to know an obscure, proprietary language, or does it harness the power of easy-to-find languages like JavaScript? This may influence whether you'll be beholden to the vendor for every little change, or whether you'll be able to get low-cost skills to handle most custom requirements. It will also help you understand whether the services you contract for will be expensive with specialists or cheaper with generalists.

Non-software, “soft” requirements

When choosing your solution, there’s more to consider than just software itself. You’ll also want to examine the vendor and how they will interact with your business by asking questions about:

Financial viability

Will they be around to support you for the long haul? Are they sufficiently capitalized to adapt to changing circumstances and continue to develop the software as your program grows?

Professional services

Can they support you when you need a surge of horsepower? Can they provide best practices for developing your safety and inspection checklists and apps? Are they cost effective?

Managed services

Do they have the capability to take the full load of application management off of your shoulders? Do their managed services save you time and money, or is it just a cash cow for them?

Support

Do they understand you as a customer and your needs? Do they have a good reputation for support? Do their customer success stories reflect good relationships with customers? Do third-party surveys support their claims?

Cost

We put cost last on the list because, even though it’s always going to be a consideration, you have to understand what you’re getting before you can decide what a reasonable cost is.

When we talk about cost, we're talking about more than the cost of the software or the cost per user of the online service. You need to consider the Total Cost of Ownership (TCO), which includes the following things:

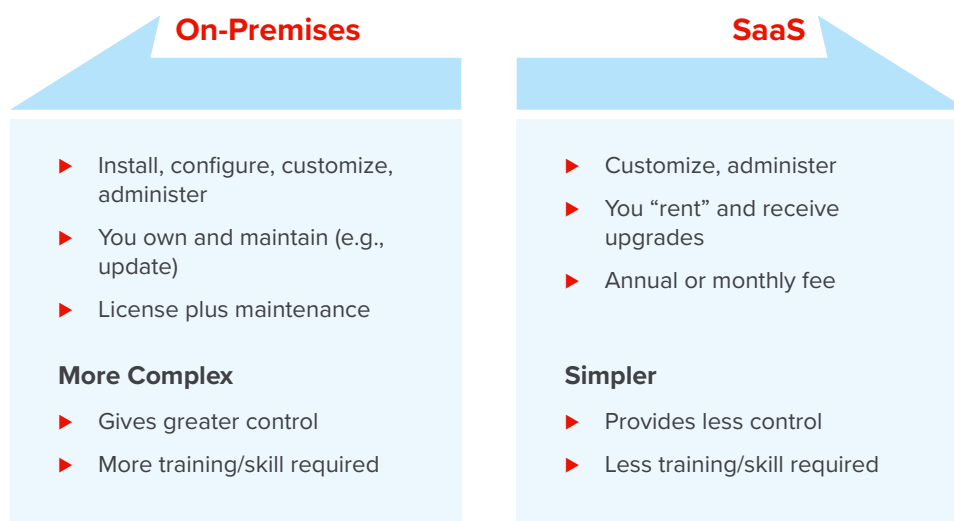
- ▶ **Software licensing costs.** If you're installing the software on your own machines, it's probably on a per-installation basis. It's probably user-based if it's SaaS, but might also be based on some other usage factor, such as data storage, number of checklists you can create, or some combination.
- ▶ **Data collection hardware.** For safety and inspections, you'll need mobile devices of some sort to collect data. It might be laptops, but that has become rarer over time for a variety of reasons. These days it's more likely to be a tablet or smartphone. If your data collectors have their own phones, you might not have any additional hardware costs at all — or you might have inspectors with specialized hardware (e.g., ruggedized tablets) while also enabling anyone to report safety hazards using an app on their own phones.
- ▶ **Centralized hardware.** This is the hardware that runs the software that allows you to create checklists, build apps, perform administrative tasks, do reporting, and more. If you're buying, installing, and maintaining the software on your own computer — an “on-premises” installation — then you have to consider how powerful that computer needs to be now, and with reasonable estimates for growth. If you install software in the cloud, you can increase power just by paying more. If you use SaaS, there's no additional hardware cost at all — your computing-power cost is layered into your software licensing costs.

- ▶ **Maintenance and services costs.** These include setup, professional services, and managed services. If you're buying, installing, and running your own software, consider the cost of upgrades and hardware administration, customization charges, and integration work.

On-premises installation vs. SaaS

The strongest trend in the software industry has been toward SaaS because of its simplicity of acquisition (being purchased as an operational expenditure vs. as a capital expenditure), simplicity of administration, and simplicity of maintenance. When in doubt, that's the direction to take.

It's best to have a plan that looks at expansion over at least the next two years, and to have a thumbnail sketch for pessimistic, expected, and optimistic usage scenarios. Realize that more users might mean more of all of these factors, including customization: The more people that use a given platform, the more they want it tailored to them.



Consider Fulcrum

A no-code SaaS platform designed to safeguard people, property, and projects, Fulcrum enables companies to streamline mobile data collection, automate workflows, and act on data-driven insights.

Fulcrum users can:

- ▶ Digitize mobile data collection
- ▶ Deploy new forms, apps, and reports, without writing code
- ▶ Deliver automated safety and inspection workflows
- ▶ Drive business optimization with unique geospatial and AI-based data insights

▶ At Fulcrum, we're committed to providing the best value and support for our customers. We have helped thousands of organizations modernize their safety and inspection programs. Can Fulcrum help you? [Try it for free.](#)