



GUIDE

The Successful Manager's Guide to Modernizing Mobile Inspections

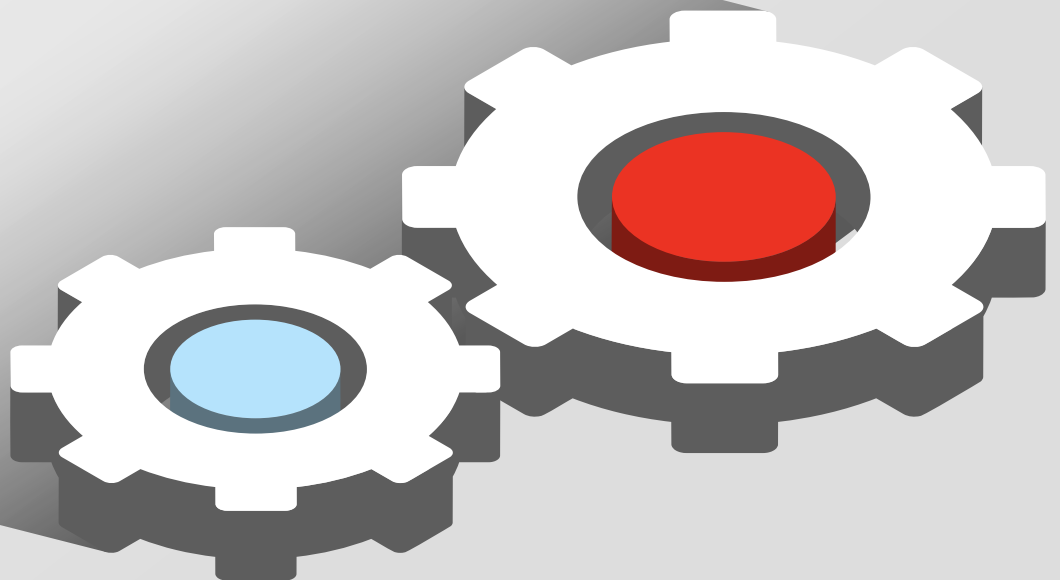


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How to Streamline your Workflows, Increase Productivity and Accountability, and Finally Bring Your Field Teams into the 21st Century.

We live in an instant world. We talk to faraway friends in real time via text or video chat. We watch our favorite television programs on demand. We see something we want, and it's delivered to our doorstep in a matter of hours.

But your teams are still lagging behind, mired in slow-moving, paper-based safety and inspection processes that waste time and money, introduce errors and, ultimately, create more work.

Maybe it's because they are reluctant to adopt new technology. Or maybe it's because IT is too busy to build the types of mobile applications you need to streamline your workflows (not to mention take on the work of keeping them current). Whatever the reason, it's slowing you down and —more importantly— affecting your ability to keep people safe and measure the quality of your team's work.

These outdated workflows limit visibility into your operations, making it harder for you to manage your teams and communicate up and down the chain. They keep you bogged down with minutiae when you should be focused on the big picture.

You need to modernize your mobile workforce, giving them the tools they need to get their jobs done faster and with fewer hiccups, to improve the quality and visibility of your data, and bring costs down. And you can't wait for IT to do it for you.

Your Roadmap to Solutions

This ebook was designed to provide you with a roadmap to identifying your current roadblocks, choosing a solution that works for your organization, and getting your team onboard with technology that eliminates busywork, increases productivity, and improves every aspect of your mobile inspection programs.



Know Your Workforce

To figure out where you want to go, you first need to understand where you are.

That starts with a thorough understanding of your current workforce, their jobs and challenges, and where opportunities for workflow improvement exist. You can start by asking these questions:

Question 1: What tasks is your team responsible for?

For example, they might need to:

- 1. Collect data:** Whether you talk about conducting inspections or performing quality assessments, data collection is fundamental to everything you do. Inspecting the condition of your assets, completing a checklist to ensure safety protocols have been followed, and administering a survey to assess workforce habits are some straightforward examples of data collection.
- 2. Follow designated procedures:** If an inspection reveals that a utility pole needs to be replaced, that information needs to be shared and the replacement initiated. If a technician isn't using proper safety gear, corrective action must occur. If a valued customer is dissatisfied with the quality of your service, remedial measures need to take place. In short: Once data is collected, who is responsible for ensuring that information is shared with the proper channels so it can be put into action, and how is that achieved?

3. Create reports: A detailed accounting of the aforementioned activities gives executives and other stakeholders a picture of how your teams are performing, allowing them to make organizational decisions based on data rather than hunches. For example, how much they need to budget for safety equipment, training programs, or even salaries. Whose job is it to compile these reports, what programs do they use, and how long does it take?

Once you have a clear understanding of your team's workflow, you will be better positioned to recognize and address trouble spots.

▶ **Managing paper, electronic spreadsheets, photos, videos and more makes for a complicated retrieval process when auditing, dealing with complex inspections, or even just measuring performance.**

Question 2: What causes friction and delays in your workflows?

While it may be what your team members are comfortable using, paper-based processes often result in:

Human errors: Illegible handwriting, transcription errors, lost and damaged paper forms gum up the works, causing delays, frustration, subpar work, or worse, allowing dangerous conditions to go unaddressed.

Unnecessary complexity: Matching up paper inspection forms to the corresponding photos taken in the field and compiling them into a single report is time-consuming and provides another opportunity to introduce mistakes.

Storage and retrieval hassles: Managing paper, electronic spreadsheets, photos, videos and more makes for a complicated retrieval process when auditing, dealing with complex inspections, or even just measuring performance.

System pile-ups: Data collection is often just the first step in a workflow. When inspections are completed or certain conditions are met in the field, it triggers a series of other jobs. With pen and paper, that process can't begin until the information is shared manually. This creates a backlog and delays action on that data.

Organization and timing issues: You'll always have inspections that take less (or more) time than expected. Without real-time visibility into field operations, team members will be left with downtime while other projects that could use extra help take longer than necessary.



Dishonesty: It's unfortunate, but it happens: A worker says he's at one place when he's really at another, or claims to have completed an inspection when in actuality it hasn't been done. When you're waiting for hours (or even days) for reports to come back from the field, there's no way to know.

If you haven't done so recently, it's probably worth spending a day or two shadowing your team members as they complete their daily tasks to see what snags they encounter, or what hazards get overlooked. These could be obstacles your workers don't even realize exist, but things that, when viewed through a more objective lens, are getting in the way of safety and productivity.

Question 3: What are the potential roadblocks to modernizing your safety and inspection workflows?

To bring your mobile workforce into the 21st century, you need to leave cumbersome, outdated manual processes behind and embrace technology that improves visibility and enables workflow automation. But implementing new software and establishing different business processes can be a challenge.

For most organizations, there are two primary hurdles to adoption:

One is a lack of understanding by management and/or IT as to what will actually improve your workflows in a meaningful way. These people might try to help, but they typically haven't been in your shoes and don't understand the needs of your teams. This can result in a drawn-out process of trial-and-error that creates conflict and wastes an exorbitant amount of time and money.

The other is institutional (and personal) reluctance to learn new software and systems. Especially in high-risk industries like utilities and construction, you may be dealing with people who have been taught that rigidity is a virtue. Consider the protocols that your team members follow day in and day out to ensure the job gets done properly and they return to their families at the end of each shift. Following the same, strict rules every day has kept them out of harm's way, but it can make it difficult for them to adapt to new ways of doing things — even those that will improve safety.

66 Building a live, visual prototype both for and with your teams, and having that prototype become a reality, will increase acceptance and adoption.

To reduce cost and improve speed of implementation, you need a solution that can be deployed quickly — without having to depend on IT.

Then, building a live, visual prototype both for and with your teams, and having that prototype become a reality, will increase acceptance and adoption. Working together to perfect the prototype means fixes happen fast and, more importantly, based on their feedback. That prototype-to-working-app process is called “no-code app development.”

 **Now that you've identified the problems with your current mobile inspection processes and the potential roadblocks to implementing new ones, it's time to start exploring solutions.**

Evaluate Your Options

So you're ready to start investigating some potential solutions. Let's explore the pros and cons of each.

Fillable PDFs: The simplest way to digitize your data collection, fillable PDFs are made by putting your existing forms into a computer program (such as Adobe Acrobat) and converting them into a form that can be filled out on a computer. It's a pretty straightforward process that even the technologically averse can usually manage.

However, fillable PDFs don't really modernize your workflows in a significant way. They're not created for use on mobile devices, you can't add rich data like photos or GPS locations, and signatures are not really verifiable. Fillable PDFs come with almost all the same problems as paper forms, but use computers instead of paper. (Which is a pretty expensive substitute, when you think about it.)



Mobile forms software: Mobile forms software enables users to complete digital forms and checklists on a smartphone or tablet (and include different types of rich data), and instantly share that information with other users or integrate it with other systems. Forms are created in a web application with a simple builder and deployed to your teams' mobile devices. This results in better data quality and faster information sharing, and doesn't require IT support for basic data-capture applications.

Some potential downsides to mobile form applications are that they can be simplistic and inflexible, they may not integrate with your existing programs, and many do not work offline. And if you do need help from IT, you might be met with resistance since they generally are not involved at the front end.

Low-code application platforms (LCAPs): LCAPs enable developers of all skill levels to build web and mobile applications using a visual, drag-and-drop interface. They relieve non-technical developers from having to write lines of code, and are easier and less expensive to maintain than traditional, high-code software. LCAPs allow you to deliver value quickly and continually improve your applications without getting stuck in IT bottlenecks.

LCAPs allow for production of a variety of application types, and can even incorporate next-generation technology like IoT and AI. But while they are sophisticated, LCAPs aren't tailored for safety and inspection data collection. This creates the opposite problem as mobile forms, which tend to be too focused on data collection.

And since LCAPs are more powerful than simple mobile forms, implementation and use gets more complicated. If you go this route, you'll want to choose one that's more "no-code" than "low-code," so you can be less reliant on developers.

Pure-play mobile app developers: If you don't have the resources to develop your own solution, you can hire a firm to create one for you. The benefits of doing things this way are pretty clear: you get a customized solution built by a dedicated team that prototypes, designs, develops, tests, and submits your application for you. If you choose the right one, you'll end up with a powerful solution that does exactly what you want.

On the other hand, there's a high monetary cost attached to hiring specialty firms, and contracting outside consultants comes with its own set of risks. They don't know your business like you do. That means you could end up with an expensive custom app that your teams struggle to use, or that doesn't integrate the way you need it to with your back-end systems, which means you're dependent on the app developers for maintenance — even small changes.



So how do you decide which one of these options is right for your organization?

Choose and Test Solutions

You'll want to select a platform that considers the needs of your entire operation, from the executive who needs to maximize efficiency to the team leader who needs to build and deploy multiple apps to the field inspector who needs to be able to capture data quickly and easily without a lot of training.

Before diving headfirst into a solution, you'll want to ask a number of questions to ensure it's going to solve the problems you need it to solve — and actually improve safety and quality.



Small steps to success

Start with a simple use case, without getting IT or your developers involved. For example, try reproducing a straightforward inspection checklist that your mobile workforce uses frequently.

Consider the following criteria:

- ▶ Will it meet your workforce's usability requirements, or will its complexity hinder adoption?
- ▶ Can you deploy it quickly, or will it require a lot of training?
- ▶ Will it improve safety or quality at every level of your organization?
- ▶ Does it encourage communication between teams and management and provide more visibility into field operations?
- ▶ Does it connect with other applications via webhooks to enable data-driven workflows based on events?

- ▶ Is it scalable?
- ▶ What help will you need from IT to implement this kind of solution, and will you get it?
- ▶ Do you want (or need) to start small and eventually grow into full-fledged applications? Or are you just interested in point solutions? Or do you need a big-bang solution to get going right now, with the difficulty that might entail?

Once you've determined which type of solution meets your requirements, you're ready to test one. Choose a qualified person from your workforce to evaluate it through a trial. (If the solution doesn't offer a free trial, that's a bad sign.)

Start with a simple use case, without getting IT or your developers involved. For example, try reproducing a straightforward inspection checklist that your mobile workforce uses frequently. If it feels like a good fit, take a deeper dive to make sure that other foreseeable use cases are either available now or in the product vision.



We're Here to Help

Once you take the initial step of digitizing data collection, you'll start to see your data flow more easily. That means you can use it in new and better ways, which is an exciting prospect. The more ways you're able to use your data, the more valuable it—and the work your teams are doing—becomes.

There are seemingly endless ways to streamline your workflows, from simple notifications to more complicated automated processes.

Start small:

Trigger workflows when specific events occur — for instance, when a piece of equipment fails inspection. Who needs to be notified? Should it be through email, text, or something else? Think about how you might improve field performance by proactively sharing information to the people who need it. (Note: This is often most important for the folks who are actually working in the field, so you might want to consider their needs first.)

Think bigger:

Consider which portions of your workflow can be automated completely, or occur with minimal human intervention.

At this point, you're going to want to engage with IT, providing them with data feeds they can “pull,” or provide standardized ways to “push” data into their systems (e.g., APIs or webhooks).

Fulcrum is a no-code application platform that simplifies mobile data collection, workflow automation, and reporting.

Our vision is to push the envelope on self-service and ease of use to make digital forms an immediate reality for every kind of user, from novice to veteran.

Our platform enables non-developers to build and deploy custom applications that cut process times from days down to minutes — without writing a single line of code— to improve safety and inspections and deliver field workflow automation that can be quickly, easily, and continually optimized.

If you're interested in no-code simplicity but need more than basic digital forms, you should have us on your list.



Request a free [Fulcrum Demo](#) here!

