



GUIDE

Top Opportunities to Modernize your Field-based Inspection Processes



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How to make rapid, measurable, continuous improvements in your field operations — without relying on I.T.

Managing a geographically dispersed workforce comes with a unique set of challenges. It can be difficult to communicate with your people clearly and regularly, which can make it tough to get consistent results. And it's hard to know that your workers are where they say they are, whether they're following safety guidelines, or — though we don't like to think about it — if they're engaged in fraudulent activities.

It's also harder to praise and reward them for a job well done, or to help those people who are having a hard time for one reason or another. Better data about their activity in the field would certainly make things easier, but that data can be hard to come by.

Getting that information in a timely manner is a challenge, too, because your team members have to stop what they're doing to send it to you (whether it's via email, phone call, text, fax, etc.), and to do that, they need to be connected to a network.

Not to mention the hassle of lugging around ruggedized computers, especially when your team members are working at height or in other awkward or claustrophobic settings.

To avoid dealing with these headaches, many organizations still rely on pen-and-paper for collecting data in the field. But in doing so, they miss out on the many benefits of modernizing their mobile workforces.

The key to pain-free workforce modernization is choosing the right place to start.

Top 8 Opportunities for Modernization

Because modernization can mean a lot of different things, you'll want to focus on the best opportunities first — the areas where you'll achieve quick wins and create buy-in from the folks whose support you need to build your programs.

This checklist will help you identify eight ways to set yourself up for future incremental success. And they're interrelated enough that each action you take has the potential to set off a series of benefits that will be recognized across your organization.

They are:

- 1.** Focus on metrics that make a difference to your field operations.
Metrics are how you see how well you're doing. Without hard numbers, you really have no way of knowing — let alone proving — the real value of any activity. And if you focus on metrics that are too broad, you dilute the effects to the daily life of your team members.

Look specifically for places where improvements in inspection and data collection can make a difference. For example, if you could get real-time data over a wide geographic area, and that data made it possible to respond to issues more quickly, which in turn would lead to lower remediation costs, then you've found a pilot project for modernization. Improving inspection productivity, accuracy, speed, and delivery of results will have a real impact.
- 2.** Consider field processes where a lot of data is already getting collected or could be collected. It might not be where you expect: If a lot of data is being collected for audits, compliance, etc., then those are good places to look for modernization possibilities.

3. Identify places where good data matters. Departments where close is good enough aren't great places to start, because you won't realize one of the most immediate effects of your improved processes — namely, better data quality.
4. Measure the process, not just the results. Metrics like the time it takes to complete an inspection and the number of inspections completed, for example, matter. This will help you not only improve operations, but improve the way you improve them. Measure the effectiveness of your own program through better business results and through better mobile inspection processes.
5. Focus on metrics that can inspire internal competition. When your team can see the metrics of their coworkers, it can inspire them to raise the bar on their own work. Steel magnate Andrew Carnegie famously did this with a large, visible board in his steel mills. Seeing how productive other crews were encouraged his employees to increase their own productivity. (Of course, Carnegie also provides a case study in why companies should measure safety and health as well as efficiency.)
6. Find processes where data reconciliation takes a long time. For instance, when data has to be matched up with photos, maps, signatures, and other information that is gathered via different methods.



Measure the process, not just the results.

7. Recognize the areas where real-time matters. When stakeholders can use mobile inspection data in real time where they couldn't before, it will make a dramatic difference in the effectiveness of your program — and people's perception of it.
8. Put it in your team's hands. One of the most important aspects of an effective safety program is helping people take responsibility for their own safety. If everyone has a phone, everyone can be involved. Look for opportunities where individuals can point to safety issues and alert the people who can fix it or take remedial action themselves. Making that data visible to leadership can spur them to corrective action.

Help people take responsibility for their own safety.



Why these steps?

One of the first technological improvements you can make — and one that will have an immense and immediate impact — is moving to digital data collection for field inspections.

Digitizing your data collection process:

Improves reliability and productivity. A mobile app with a checklist helps your team members quickly and efficiently follow the correct, step-by-step process you need them to follow, even if you haven't had a chance to go over it with them recently.

Improves documentation and evidence. Pictures, video, and audio give you better, more reliable evidence of conditions in the field — you don't have to physically be there to supervise. Records that are time-stamped and geotagged verify when and where inspections are completed.

Gives you real-time insights into what your teams are doing. Once they collect a record, you can access it instantly (or, if they're offline, as soon as they reach connectivity), rather than having to wait for them to send the information to you — or worse, to physically bring it to you.

Improves both data quality and speed. Instead of entering information twice — once on paper, then again when transcribing it into your database — data is taken directly as it is entered. No more transcription errors or wondering what that illegible scribble was intended to convey.

Seamlessly ties in multimedia. Because digital collection brings the data fields and the multimedia fields together in a single application, you don't have to do things like match up inspection records with the corresponding photo or videos.

Streamlines job reports. Instead of waiting for people to get back to the office to get inspection results, information can be synced from anywhere there's cellular or WiFi connectivity. And because the data is formatted consistently, it's easy to create templates that immediately crank out reports as soon as the data is synced.

Prevents lost data. Once the data is synced, it's there. No worrying about spilled coffee obscuring a signature, or paper getting lost in the shuffle. Auditable signatures are captured and stored permanently.

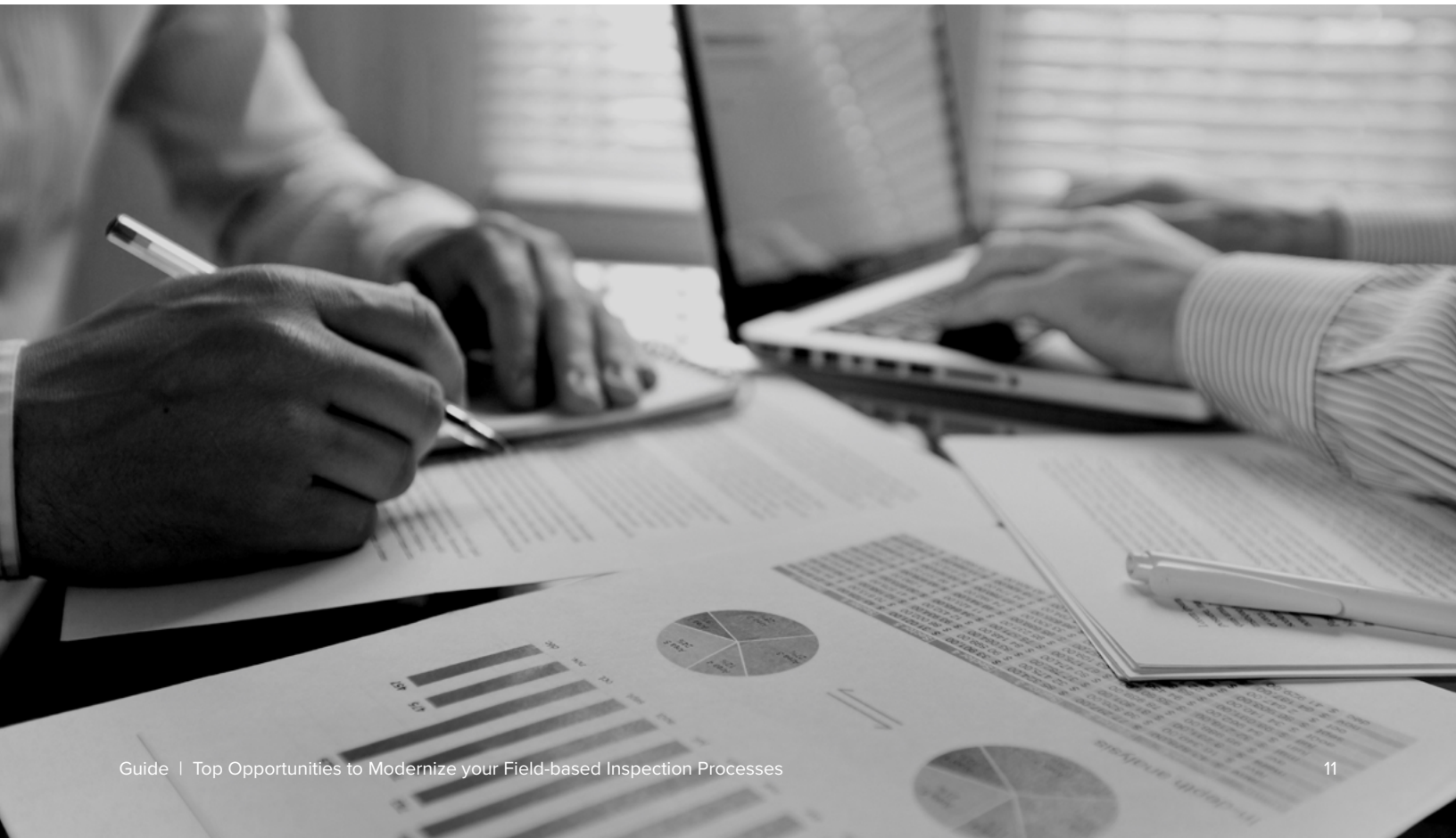


Work Smarter

A mobile app with a checklist helps your team members quickly and efficiently follow the correct, step-by-step process you need them to follow, even if you haven't had a chance to go over it with them recently.

Makes analytics a faster and easier process. By capturing data quickly and making it available for analysis in real-time or near-real-time, you can make faster decisions. (For instance: Is one team member lagging behind, and could use reinforcements to get the job completed on time? Or is a popular item sold out at one location while three dozen sit at another where few people buy it?) And by making that data available to more people within your organization, you'll be contributing to a more complete picture, too.

Once you have data collection digitized, you can modernize more processes that will continue to make a difference, but in ways that might be harder to “sell” leadership on — things like data sharing, workflow automation, system integrations, etc. But you can't do those things effectively without getting the data part right —and that all-important buy-in — first.



The Double- Edged Sword of Measurement

Many business leaders rightly follow the maxim, “You get what you measure.” But over prioritizing metrics can cause its own problems. We’re all familiar with the issue of schools adopting standardized test scores as an essential benchmark, then creating students who can perform well on the test but lack other skills such as critical thinking.

That’s why you want to measure things that matter, while not making people distort their business practices unnecessarily — which brings another maxim to mind: “Not everything that counts can be counted, and not everything that can be counted counts.” The key is to look for metrics that help people do what they need to do, while also leaving room for people to perform their jobs more effectively in ways that are hard to capture.

Some steps to achieving that balance:

- 1.** Look for a relatively small number of indicators that really matter to the business. (This doesn’t have to mean CEO-level “business;” it can be at any level. The goal is to start somewhere, demonstrate value, and build outward.) It’s hard to get people to pay attention to things that they don’t see as a problem — and that means that the better your company is doing right now, the less likely they are to even realize that they could do better. So when you make an impact with new processes, better safety, and improved inspections, you want to do so in a place where those changes will be recognized as important.



- 2.** Identify metrics where the company isn't doing as well as it should. If you have \$10,000 in your bank account, an uptick of \$100 is barely noticeable. If you only have \$100 in your bank account to begin with, you've just doubled your money. Find areas where you have a shot at making absolute improvements that represent a significant percentage improvement as well.
- 3.** Consider the big picture. If your metrics are too far down in the weeds, executives won't want to look at them (and lots of people at the lower levels of the organization will spend too much time looking at them). You will need to improve your processes at lower levels, but your most important measurements are going to be higher up the chain.

A word about IT

When you're ready to start modernizing your processes, you'll want to consider a couple of things:

First, how engaged do you want your IT department to be in your project? You want to cooperate with IT, of course, but involving them too heavily has its drawbacks.

They might be excited about getting you off the ground, but they are likely to create a purpose-built solution for you which they will then be responsible for maintaining — which makes you dependent on their availability.

You want flexibility in your digital data collection solution, so ideally you will be able to prototype, create, and modify reliable, data-driven mobile inspection processes without getting caught up in IT's backlog.

Second, buying and installing software means you (or your IT department) are responsible for managing both the software and the hardware it's installed on, which includes things like updates. You need to be focused on managing your mobile inspection processes.

An online service — known as SaaS — leaves bug fixes and updates to the software company and takes them off your plate. Plus, you can access it from any computer at any time (and you're not dependent on IT to do it).

Moving to SaaS also means moving your data into the cloud. Rest assured, it's very secure — and it means your data is always accessible from anywhere, just like the software itself.

What is SaaS?

It sounds like jargon, but it's something more than 4 billion people around the world use all the time! SaaS stands for Software as a Service, which means the software is cloud-based, so you use it online rather than installing it on your own computer (which means updates occur automatically, and you don't have to buy a new version every year). Facebook, Zoom, and Salesforce are all SaaS products.

What is the cloud?

The “cloud” refers to servers that can be accessed via the internet. When you use “cloud storage,” you are letting someone else store your data for you, but you can access it at any time. Though some people struggle with the idea of moving their data to the cloud, it's not unlike storing your money in a bank. Cloud storage enables flexibility that otherwise would be difficult, just as it's easy to take out money at an ATM when we need it. Think of the cloud as a bank for your data.

(By the way, the cloud is very secure. There are probably more people at Amazon, Microsoft, or Google managing security and fending off hackers than at your company.)



Conclusion

Modernizing your field-based inspection processes today will pay dividends well into the future. First, by helping you perform them with greater efficiency than ever before. Second, by ensuring that the data you get from those processes will have better breadth, accuracy, and quality. Finally, by providing you insights that can help you manage your mobile team's performance while improving the quality of their work.

For example, field teams who install, inspect, or manage hardware installations can do less rework and deliver higher customer satisfaction and a better understanding of the conditions that affect their performance. Safety-oriented teams can ensure fewer accidents, identify near-misses more precisely, and correct hazardous conditions more quickly. Quality teams can collect better data about why quality targets get missed and make better recommendations for improvements.

In other words, everything you do, you will do better and faster — verifiably so.

Some of those improvements will be evidenced by hard ROI. Some will be shown in other metrics. But no matter how they manifest, you will see a difference in your teams, the people they support, and the business results you get.

▶ Visit our website to find out more about the Fulcrum field inspection management platform and how it can help you increase performance, improve safety, reduce rework, and make your field inspection program more effective — or get started today by signing up for your free trial at fulcrumapp.com.