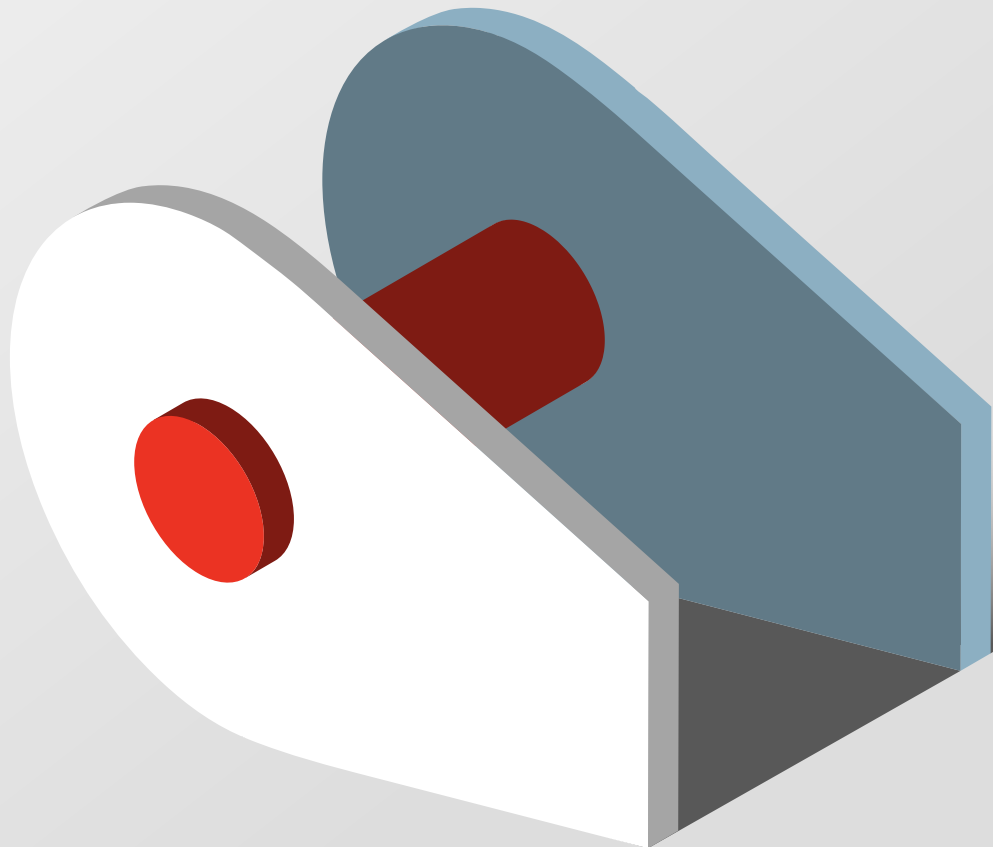




GUIDE

Using Fulcrum to Modernize Your Mobile Workforce



How to improve the quality, safety, and efficiency of your field operations with our no-code mobile data collection and workflow automation platform.

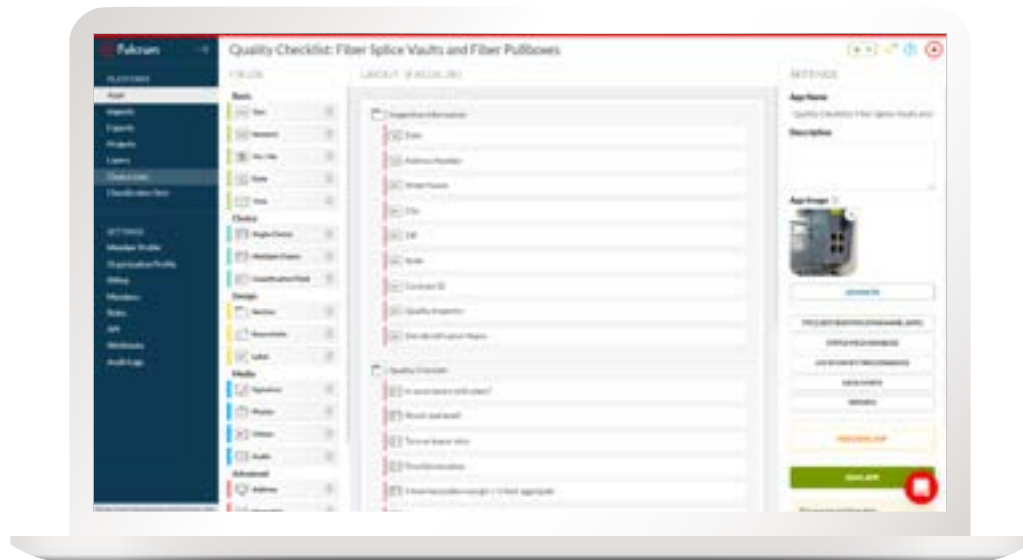
Once you've decided to modernize your mobile workforce's safety and inspection processes, there are a lot of different options to choose from. You want to ensure that you're getting the benefits you need right now, but you also want to avoid locking yourself into dead-end technologies. And while you want to be able to integrate mobile workforce automation solutions into your other systems, you don't want to be forced to knit together a patchwork of technology to do what you'll eventually need to do.

Fulcrum is a no-code application platform that fulfills key requirements for organizations that are modernizing their mobile workforces. It addresses the issues you're trying to solve right now — data collection, automating workflows based on the data being collected, reporting, and more — for your employees who are conducting inspections in the field.

Fulcrum also provides an ever-expanding set of no-code capabilities for workforce management and productivity improvements.

In addition, our managed services, professional services, and second-to-none customer support ensure that you're never going to be left out in the cold, whether you temporarily need more horsepower to complete a project or you need ongoing support for your most demanding activities.

Let's look at how Fulcrum can help you modernize safety and inspections for your mobile workforce.



Understanding your requirements

Before committing to any no-code platform, start by thinking realistically about your current and future inspection needs.

If you're like most people managing a mobile workforce, your job can be pretty chaotic.

You get paid to complete projects on time and on budget. To do that, though, you need to manage the way work orders get assigned to your mobile teams, make sure they're doing the job according to standard, and be as accurate and efficient as possible with respect to data collection, handling, and reporting.

Paper-based processes make that extremely difficult, because:

- ▶ You can't reassign a work order to another member of the team if they don't have the right paperwork physically in hand.
- ▶ Transcribing data from paper into computers causes delay and data errors.
- ▶ If an inspection includes pictures, audio, video, or signatures, someone needs to cross-reference the paper with filenames to create a complete record — another tedious, time-consuming, and error-prone task.

Once captured, the data often goes into a spreadsheet, custom-built database, or other bespoke solution for your organization, which causes its own set of maintenance and resource problems. Reporting, analysis, mapping, planning, and communication all become unduly complicated.

Unfortunately, IT usually doesn't understand the unique needs that mobile workforces have. Even when they want to help, they're often too understaffed to devote the time and energy needed to conquer the problems that you need to solve.



How Fulcrum Can Help

From its inception, we designed the Fulcrum no-code application platform to support the mobile workforce — in stark contrast to other, generic no-code platforms in which mobility is bolted on. Using Fulcrum to create no-code apps for your teams' safety and inspection processes will reduce the chaos and stress of trying to force-fit another platform to your requirements.

Fulcrum improves quality and productivity throughout all aspects of your mobile employees' work. For example:

- ▶ You'll see an increase in the speed, accuracy, and variety of data your mobile workforce collects.
- ▶ Managing your workforce, through work orders and safety-oriented workflows, will become simpler and more efficient.
- ▶ You'll find it easier to report information up and down the chain, across organizational silos, and even to customers.

“ Fulcrum makes it really easy for the stations to collect the data and for us to receive and use the data in GIS.

– Santa Barbara County Fire Department

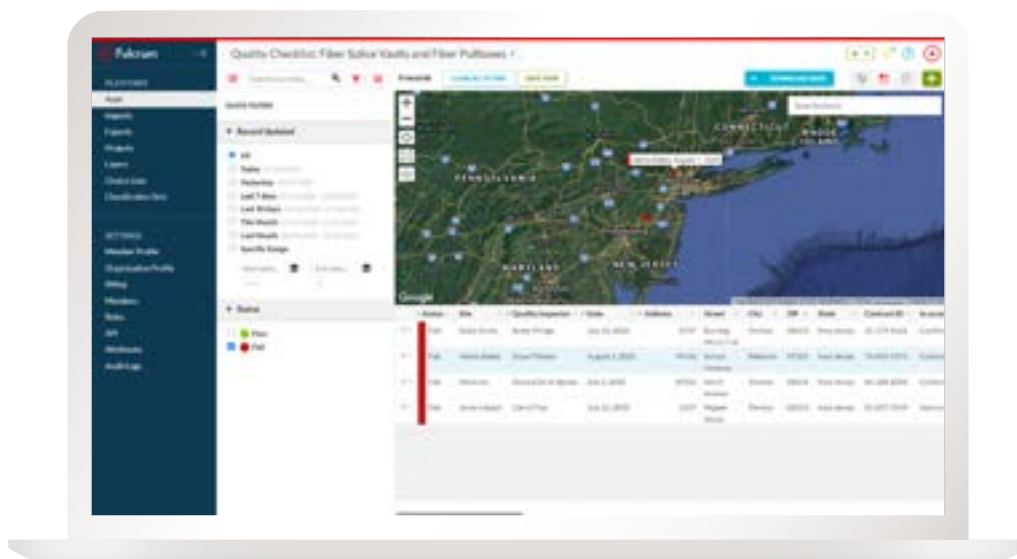
Data collection

Data capture, review, and transmission are some of the most powerful ways you can modernize your mobile workforce, and Fulcrum offers some of the most outstanding data collection capabilities among no-code application platform vendors.

Here are some of the things you can accomplish with Fulcrum.

Collect without connecting. Many digital data collection platforms require a live connection to the cloud, either through WiFi or cellular transmission. This limits their ability to collect data in situations where connectivity is limited, such as:

- ▶ Construction sites, power generation and transmission facilities, and other sites often contain a great deal of metal or electrical “noise” that can block or distort cell and WiFi signals
- ▶ Rural, environmentally protected, third-world, and other undeveloped areas may have severely limited coverage
- ▶ Even in traditional office environments, cellular coverage may have dead zones that vary by carrier



▶ 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.)

Know where everything is. Though all too often it’s an afterthought, location-based information provides critical insights into every mobile workforce’s processes.

In Fulcrum, every record is automatically geolocated, which:

- ▶ Provides the ability to view efficiencies based on where a team is located
- ▶ Helps uncover geographic pockets of bad practices, non-compliance, and troubling data
- ▶ Helps manage scheduling, routing, and changing workloads across a distributed team
- ▶ Can even help spot fraud, such as a person claiming to do two inspections while taking data at a single location

Get higher quality data. In a [2017 Harvard Business Review study](#), Thomas Redman and colleagues showed that 47% of newly created data records have at least one critical — i.e., work-impacting — error. Mobile data collection using paper or rudimentary digital forms is the cause of many of these errors. The problem is amplified when organizations collect multimedia information, such as signatures, photos, audio, and video.

“ Inspectors can plan their routes better with a map representation of all pillars to be inspected. We’re now able to visit all pillars in a patrol. Missed pillars are a thing of the past which has improved the overall safety, and we’re doing more work with fewer people.

– Northpower

For example:

- ▶ Manual or OCR transcription from paper forms to electronic databases results in misspellings, number transpositions, and information gaps when handwriting can’t be deciphered.
- ▶ When someone manually enters records into a database, they need to add in names and links to any multimedia files that are associated with each record. Folder structures, database formats, and manual entry leave open many opportunities for connecting the wrong files with a given record.



- ▶ Rudimentary inspection forms that don't handle multimedia capture are no better than paper when it comes to connecting the right media to the right records.

Share data like a pro. If a no-code application platform is a silo, a business will never be able to tap the full potential of its data. Since no single format is sufficient to cover all of the use cases where a business might gain value, it's critically important to have a flexible set of export formats.

- ▶ Excel and comma-separated values (CSV) are least-common-denominator formats for business users and application interfaces.
- ▶ Modern applications share data through message formats such as JSON and XML.
- ▶ Self-contained relational databases make it easy for IT organizations to query collected data.

- ▶ Formats designed for geographic information systems (GIS) help communicate polygons and other specialized information in a consistent way.

Fulcrum delivers second-to-none data collection capabilities, and much more.

Workflows, Workforce Management, and Reporting

As important as data collection is, it's only the starting point for your modernization efforts.

You don't need passive, static data. It needs to trigger action — automatically, where possible. It needs to flow up and down your reporting chain, and even across departments, to provide reporting, analysis, and insights. It needs to provide information that relieves chaos, not create a data deluge that overwhelms people with ever more records.

“ It is so easy to use that our training period is greatly shortened. Data quality is very important to us so it can't be overly complicated. Fulcrum has allowed Tilson to focus on our competitive advantage and not get distracted on mobile development.

– Tilson Tech

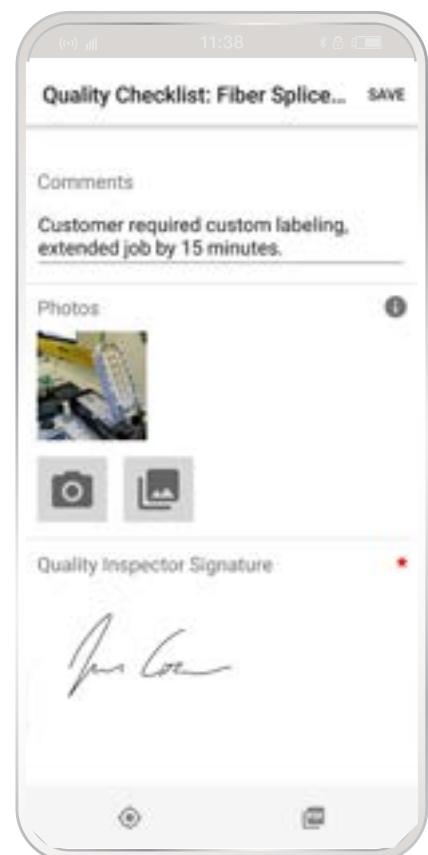
Improve workforce management. Visibility and flexibility are key to effectively managing mobile teams. Fulcrum empowers you to:

- ▶ **Adapt quickly when your inspection process hits a snag.** When an inspector collects a record indicating a problem that requires more time onsite, team leaders can see this immediately so they can evaluate current work orders and potentially reassign tasks to different members.

“ In time savings alone, Fulcrum pays for itself.

– RedZone Software

- ▶ **Improve collection reporting.** Daily and monthly reports of collection information, along with record totals by member, will ensure that you're able to understand and adjust your team's productivity — without having to tally up reams of paper to get it.
- ▶ **Get the big picture.** As your team collects data over time, a periodic review of times, locations, number of data points taken, and other criteria can help team leaders and supervisors identify best practices, ensure that team members are performing according to standard, and root out potential problems within the collection team.



Provide simple and sophisticated reporting. Once you're armed with the data your team has collected, you want to put it to use — helping your team, your company, and even your customers take action with the latest information so that everyone is pulling in the same direction.

Fulcrum allows you to:

- ▶ See the data as you need it. Sort and filter your data to evaluate it on a record-by-record basis or as a collection, in list format or as points on a map.
- ▶ Get detailed reports in standardized formats. Create professional-looking custom reports with your company logo for your clients right from the Fulcrum dashboard.
- ▶ Share only what is needed. Publish the data of your choosing in read-only format for sharing with internal or external stakeholders.



Give Fulcrum a Try

Fulcrum's no-code platform enables organizations with mobile workforces to improve their safety and inspection processes by streamlining mobile data collection, automating workflows, and delivering unique insights into field operations that lead to better, faster decision making.

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 inspection processes and deliver field workflow automation that can be quickly, easily, and continually optimized.

The ability to efficiently capture rich, high-quality, location-based data and share it in a variety of formats for rapid analysis enables organizations to improve every aspect of their field operations. Want to see for yourself?



If you're interested in learning more about how Fulcrum can help your next job, start a [free trial today](#).