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# Field Force Operations for the 21<sup>st</sup> Century

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“Field force operations remain one of the key areas of transformation still untapped by many utilities and one of the key areas they can drive value from over the coming years”

James Basden, Corven Partner, Utilities

Field forces are the delivery arm of many utilities and one of their key customer touchpoints. However, while many organisations have focused on transforming their back office functions, few have yet to realise the full benefits from their field force operations. Disregarding the value this can deliver means overlooking **cost reductions and productivity gains of 20-30%**, not to mention the accompanying **improvements in customer satisfaction.**

Characteristics of optimised field force operations include:

- Ability to plan against known resources and schedule to discrete time slots

- Real time visibility of on-day work status, improved appointment keeping and managed on day flexing of schedule
- Clear roles and accountability throughout the front and back offices
- Improved data management and analysis
- Focused performance metrics and targeted incentives
- This is achieved through holistic business-led change programmes, enabled by technology



Process optimisation:  
Improved accuracy of planning and scheduling and on-day visibility and control

At the centre of optimised field force operations are efficient and effective

## Case study FTSE 100 utility – Operating model design

Our client's processes were not aligned with the organisation structure, IT or management information systems. This resulted in sub-optimal performance and a demoralised workforce.

Corven engaged the workforce in the design and delivery of an efficient new operating model, including the implementation of a number of quick wins to support buy-in and raise morale. The new ways of working were successfully rolled-out in phases across the organisation, supported through training and on-site consultation.

The result was significantly improved delivery capability, e.g. reduction of overdue work by 90%, supported by changes in the behaviour of the workforce whilst preserving the integrity of the asset base and network during the rollout.

"We've monitored the performance and seen it improve, and we've looked at the frustration of the staff and seen that there is a better way of working for us moving forward." Director, Maintenance.

processes that support the utility's upstream, on-day and downstream activities. Planning and scheduling should be integrated and largely automated, with **planning against known resources and scheduling against discrete time slots**. Utilities should look to **combine the planning processes for maintenance and capital renewal activities** and optimise the channels used (such as web interfaces for customers to book time slots). To underpin effective planning and scheduling, internal and external

**data should be effectively leveraged** (trend analysis, demographic information, etc), allowing for more accurate planning and reducing the need for "buffers" in the daily schedule. Planning processes should also support linking jobs at the same site, **minimising travel time and accurately managing dependencies** with the correct skill set matched to each stage of the job.

## Organisation design: Clear roles and accountability

Confusion in organisational design, reporting lines and accountability should be a thing of the past. Planning and scheduling functions should be combined as automation allows for **staff to be upskilled to focus on value-adding activities** and management by exception. Dispatchers and supervisors should have **clear roles and accountability for on-day delivery** with a **single point of contact for the field force**. Centralisation of back office functions should be used to ensure **common processes** and to drive **economies of scale**. In the field, clear reporting lines, job design and improved management information should allow for widened spans of control, with **ownership of decisions being moved to the field**. Multi-skilling that allows field resources to carry out both maintenance and capital renewal work should add to on-day flexibility.

## Improved understanding of data requirements and management

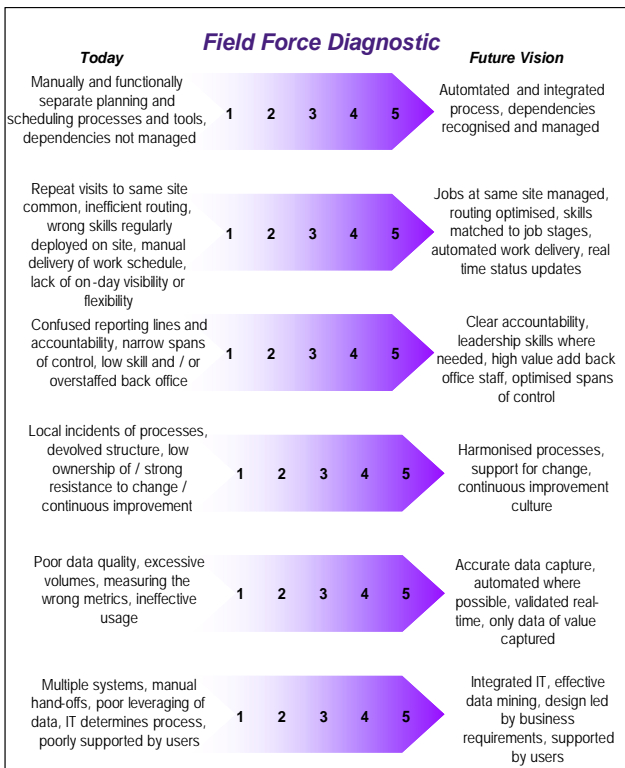
Improvements in field force performance

should be supported by a **step change in data capture, management and analysis**. Data capture should form part of the field force's core role, with validation occurring at the point of capture. Improved understanding of the data needed should result in only useful data being captured, thereby reducing quantity and improving quality. Leveraging data effectively to support planning activities and performance analysis (including performance management) in combination with **targeted metrics will allow for a real understanding of performance drivers**.

## Targeted incentives: Driving desired behaviours

Field force incentives should be **targeted and closely linked to organisational objectives**. Current incentive schemes often offer decreasing rewards for improved productivity which are counterproductive. Underpinned by **improved management information**, the field force should be **incentivised to complete work on time and at optimised cost**.

## Mindsets and Behaviours: Change from within



The finest design would not succeed without the right people willing to commit to a new way of working. Such changes to mindsets and behaviours can be delivered through a number of techniques. “BPR” (Business Process Reviews) can be used to **engage staff in the design of the new processes**. A culture of **continuous improvement** should become the norm and can be installed through tools such as “Workout” and “PIE” (Performance Improvement Events).

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Accompanying this and changes to the organisation design, **leadership skills** should be transferred to the people that will be driving the enhanced performance.

## Business led change enabled by technology

In the past, change has often been led by IT – in practice if not intentionally. Future field force transformation should be business-led, with technology enabling the step change required. **The focus should be in optimising available off-the-shelf technology rather than trying to excessively tailor bespoke solutions.** Doing so maximises business fit at basic cost and minimal development time. Integrated IT architectures should allow systems to interact, **reducing manual hand-offs** and ensuring **data is effectively leveraged**. Automation of much of the planning and scheduling processes will reduce the need for low-value / high-volume activities to be performed manually and instead allow **staff to focus on high-value activities**. Dispatch tools should give a real-time view of work status for managers and customers. Ruggedised field devices should allow users **access to job schedules and centrally held data** (manuals, maps, etc) whilst facilitating data capture in the field. Broadband speed data links should allow **real-time data validation and work status updates**.

## Nirvana or reality?

Attempts have been made by a number of utilities and other organisations over

the last decade to drive greater efficiencies from their operations. However, they have often failed through a lack of understanding about the scope of field force transformation, or how it should be implemented. Changes in the back office were often not linked to transformations in the field. Staff were not involved with the design and testing of new operating models and poorly implemented new technologies often served only to alienate and de-motivate staff.

So how to realise this vision? To optimise the performance of field force operations the key is to recognise the scope of the transformation (covering both front and back office) and **focus on the people agenda**, taking a holistic approach to the change:

- Focus on designing the right processes
- Identify the organisational structure and skills needed
- Challenge the existing working practices and cultures
- Select the right performance metrics to align performance to the organisation's objectives and the right IT to support the change
- Engage the back office and field force during the design and implementation to ensure ownership of the change

To change the way an organisation operates it is necessary to change the way the people in the organisation behave. Only by engaging the workforce and managing the people agenda will today's utilities realise the full benefits from their field force operations.