Are Your Engineers Ready to Use Mobile Software?

COMMUSOFT

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Introduction

One of the key concerns of many field service managers is getting engineers (young and old alike!) on board with the idea of using their mobile devices for work. Everyone has a smartphone nowadays, so you'd think it would be easy, right?

Simply telling engineers to grab their phone, download an app, and get on with it will definitely lead to grumbles and implementation hiccups which mean a loss on your investment. After all, no matter how good a software is, there's no point to it if your employees refuse to use it and use it well.

This is why we've put together this checklist of decisions you **NEED** to make when you're thinking about training your engineers to use mobile devices. As a manager, you'll be faced with many tough decisions and, sometimes it's not really between a bad decision and a good one, but rather what's more appropriate for your business. You can use this checklist to better understand where your priorities should be and see a well-rounded solution at the end!

The Checklist

Some managers will ask employees to use their own mobile device as a means to cut costs. This is definitely cheaper but doesn't contribute to productivity and blurs the line between work and home life.

I want them to use their personal devices. ☐

I will provide them with work devices. ☐

If you choose to provide them with work devices, what type of device?

Phones, because they have more functionality (e.g. calling the office). ☐

Tablets, because they have bigger screens and can't be used for personal matters as easily. ☐

Think about a device they'd be happy to use.

The cheapest phones or tablets might be able to run the apps you need but they will be slow and burnout in under a year, as well as have a higher risk of getting damaged. However, if you manage a large workforce, they will be more productive and happy with newer devices but it would come at a higher cost.

I will provide the cheapest option available and it's up to them if they want to use something else. ☐

I will provide the best quality/price option. ☐

I will provide them the best tools on the market. A mobile device is just as part of a job as a wrench. ☐

How do you ensure the mobile devices are used strictly for work purposes?

I trust my engineers to only use their mobile devices on the job. ☐

I will use mobile device software to manage the security of the devices and be able to render them unfunctional unless in case of emergency. ☐

How do you ensure engineers are aware of what's personal and what's professional when using their personal devices for work?

I trust my engineers to be able to tell the difference. ☐

I will organise a training session to discuss the matter and give concrete examples of what is considered professional use and what is personal. ☐

When you look for a software that your engineers will use, how do you decide?

My engineers have to accept my decision regardless of their opinion. ☐

I will consult other managers but not the engineers themselves before I decide. ☐

I will offer 2-3 experienced engineers a free trial of the app and then consult them. ☐

I will send all my engineers a questionnaire with what features they want on a mobile application (e.g. work order management, attaching photos, customer signatures, etc.) ☐

In which order would you prioritise the following qualities of a mobile app in order to make it easier for your engineers to use it?

A large number of features. ☐

Intuitive and designed specifically for tradesmen (e.g. large icons for larger hands; custom fields for unexpected situations, etc.) ☐

Security levels (e.g. an engineer won't be able to see customer contact information). ☐

Simple and efficient tracking for work orders. ☐

Works with the main field service management software you use for the office. ☐

How will you support your engineers in learning how to use the mobile application?

I trust my engineers will be able to use any app with no training and am willing to let them "trial and error" their way through. ☐

I will choose a software app that comes with live training (by phone or video call). ☐

I will learn how to use the app and train them myself (or ask another manager to do it). ☐

How will you support your engineers when they encounter problems in using the app?

I will answer their questions myself. ☐

I will choose an app that comes with a good FAQ or knowledge base. ☐

I will choose an app that has good reviews for their customer service department. ☐

When and how will you assess the success of mobile device deployment?

I will send out a questionnaire to the engineers 4 weeks after deployment and another one 3 months after deployment. ☐

I will compare our key metrics (number of work orders completed, first-time fix rate, etc.) 3 months before and 3 months after deployment. ☐

What is your main goal when asking your engineers to learn how to use a mobile app?

Reduce the amount of admin and double data entry. ☐

Ensure each work order has the correct information associated (e.g. description, past work, photos, etc.). ☐

Impress the customer and make it more convenient for them to hire you (e.g. providing mobile payment, digital signatures, etc.) ☐

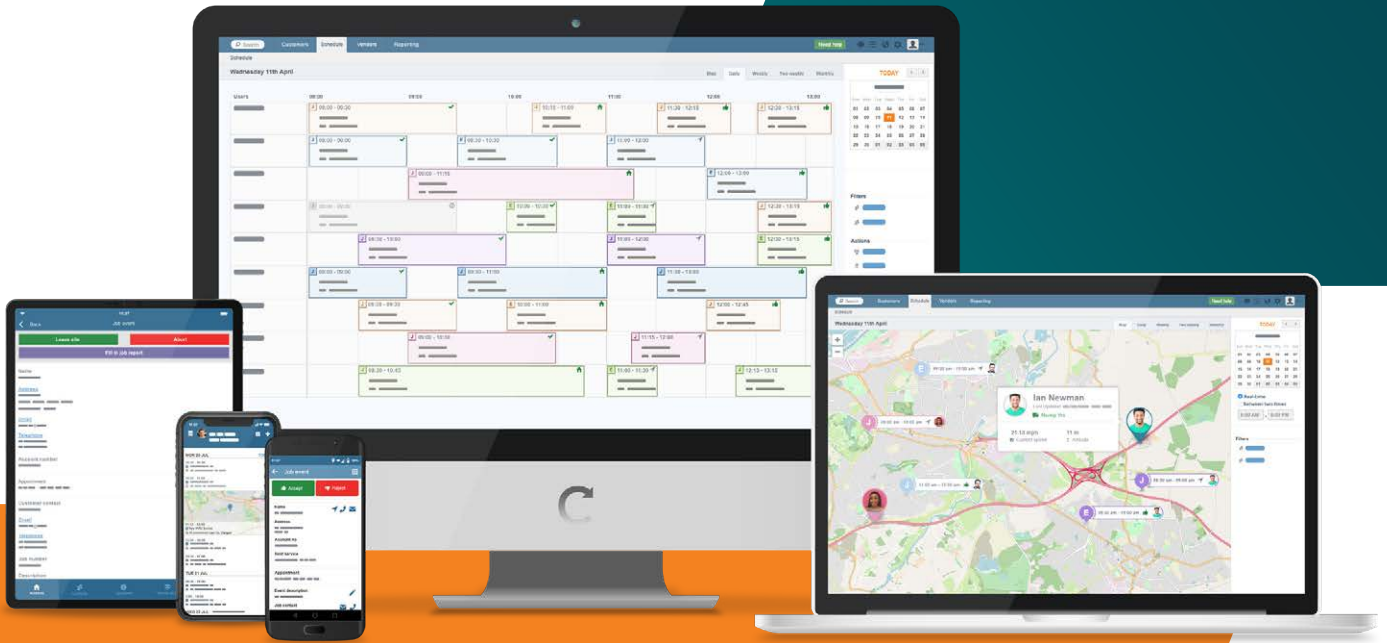**Instil accountability and good business practices with your team.** ☐

Retain engineers longer and help them with their tasks by providing the best tools for the situation. ☐