Introducing Therefore FieldTask™
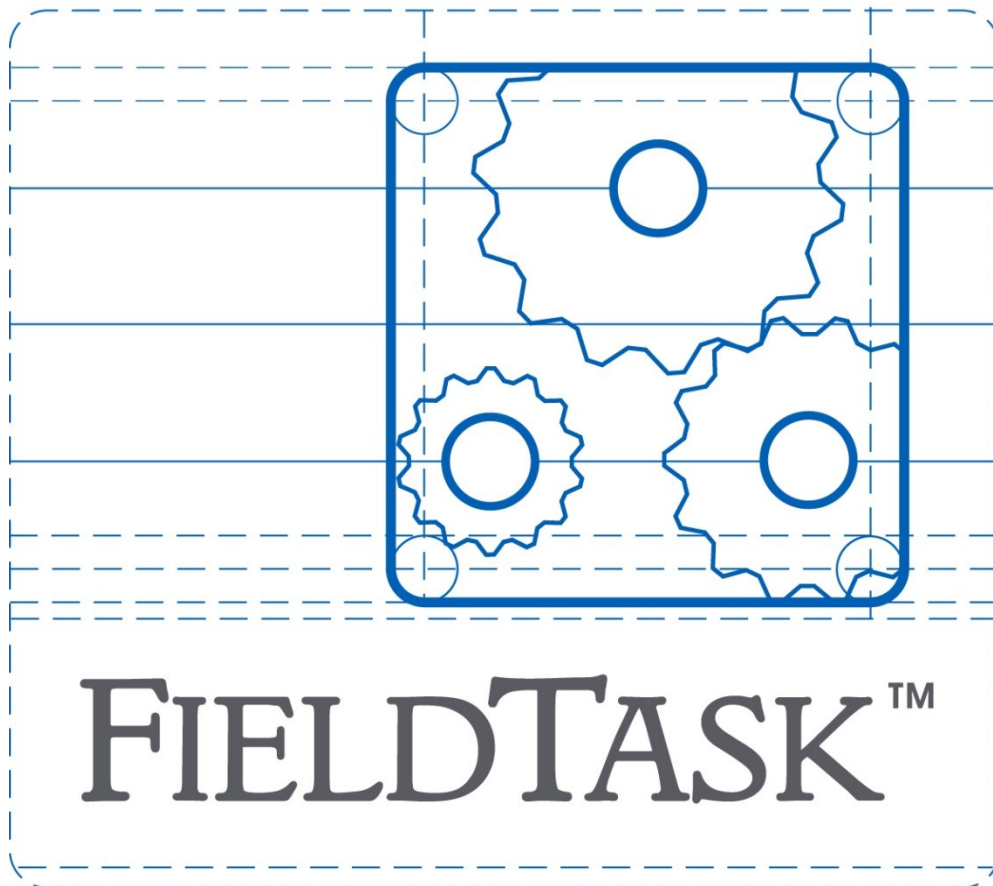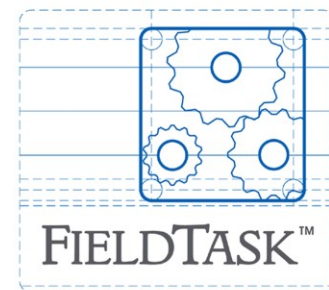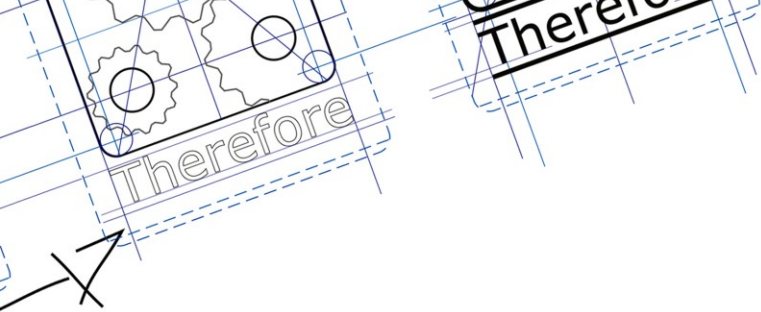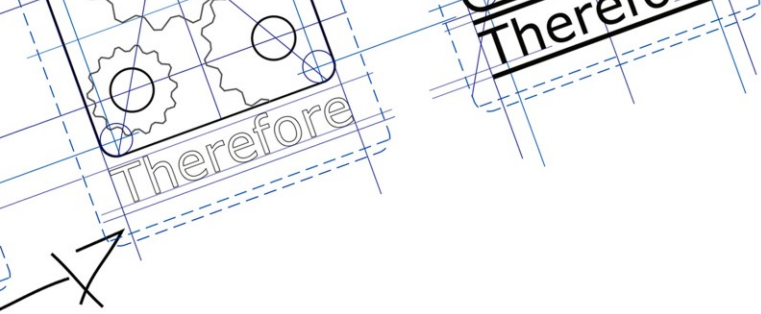
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ABOUT THEREFORE FIELDTASK™

Understanding the need

Managing a field based team is not for the faint hearted. The complexities associated with field task communication, coordination and management often result in field operations that underperform relative to management expectations.

The Therefore team has undertaken extensive research to determine the factors that make managing a field based team so difficult. This knowledge has been used as the foundation upon which the Therefore FieldTask™ application has been developed.

Success requires a support structure

The most successful field teams tend to be those that have the most comprehensive support structures in place.

Winning support structures typically provide field staff with an office based customer services desk to take customer calls and perform coordination, use technology to bridge the office / field communication gap and have a management team that has access to meaningful management data.

If you can't measure, you can't manage

If field task execution can't be measured with ease, managing it becomes a "hit and miss" exercise. The management of field task execution requires a dashboard and easy access to purpose built reporting.

Accountability

Clear lines of accountability are a critical success factor when managing a field based function. Given the number of moving parts that play a role in the provision of a field based service, accountability often falls into a "grey area", which works against efficiency. Critical to the management of accountability is the management of deadlines, the ability to track performance relative to deadlines and clarity regarding the party accountable for each task and query.
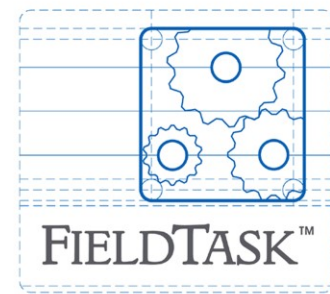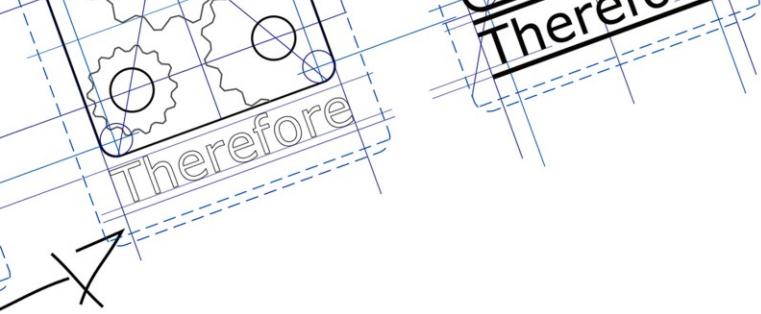
Delivering across functional areas

In the absence of a field task application capable of coordinating effort across functional areas, field task delivery tends to be sluggish and prone to failure. The Therefore FieldTask™ application is capable of bridging any number of functional areas, thereby providing your customers a seamless customer service experience.

Performance based management

Implementing performance based management for field staff is notoriously tricky. Those that manage field staff are at a natural disadvantage, given that they have limited opportunity to directly observe the performance of their staff. As a consequence, they require access to robust management data which allows them to accurately assess the quality of their staff's performance and manage accordingly. All too often, this data is not available.

Everyone needs to be on the same page

Communication is one of management's perennial challenges and nowhere is clean communication more critical than in the execution of field tasks. A field task management application needs to provide a single source of accurate and timeous data, thereby allowing all role players to work with "on the same page" clarity.

Paper and spreadsheet based solutions aren't solutions

Paper and spreadsheet based field task trackers may be cheap, but they have far too many shortcomings to allow them to be a workable tool for measuring, managing and executing field tasks.

THEREFORE FIELDTASK™ BENEFITS

Therefore FieldTask™ ... *THE* field task management tool

Therefore has carefully researched the burn points associated with the execution of tasks where a component of the action needs to take place "out in the field" and has developed the ultimate in field task execution tools - Therefore FieldTask™.

Therefore FieldTask™ can be rapidly deployed, accessed from anywhere with Internet connectivity, adds value from day one, improves the ease of field task management and is highly cost effective.
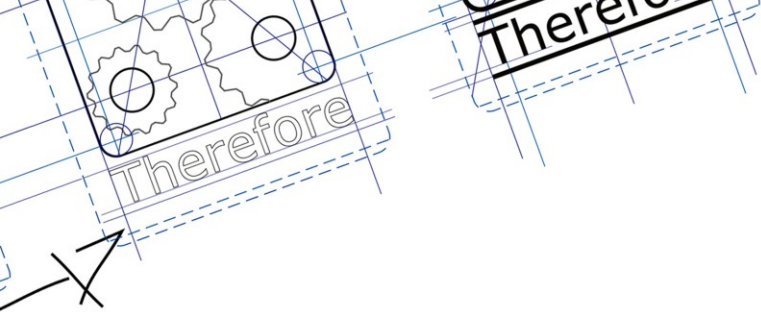
The leading field task execution tool

Therefore FieldTask™ can be used to drive and monitor the execution of field based tasks, allowing your field support team to go about their day to day work without constantly having to phone into the office to provide feedback and find out about the next "job" that requires attention.

Rapid deployment

No two organisations are alike. The Therefore FieldTask™ application can be rapidly configured to meet the specific needs of your field operation. Once configured, the process of logging field tasks and receiving feedback from the field regarding progress is quick and intuitive.

Anywhere … anytime

Therefore FieldTask™ is an Internet based tool. As a consequence, it can be accessed from any connected location ... opening up a whole new world for your field based staff.

Management, measurement and reporting

Ease of management requires ease of measurement. Therefore FieldTask™ optimises your ability to manage field task execution by providing a dashboard, a suite of real time reporting, deadline management capabilities, progress status tracking and automated poor performance flagging.

## Teams and cross functional delivery

Perhaps your Call Centre hands tasks over to the Workshop who in turn hand them over to field staff for installation after which the Finance team processes the invoice ... no problem. Therefore FieldTask™ can coordinate the execution of tasks across any number of functional areas, irrespective of where they are based, and keep all the players "in the loop". After all … it's all about offering a seamless Customer centric solution.

Accountability, early warning and remediation

The Therefore FieldTask™ tool ensures that all tasks are allocated to the party accountable for their execution, thereby leaving no grey areas that can be used to legitimise non-delivery.

Each task is awarded a targeted close out date / time and performance is tracked accordingly. Where performance falls short, Therefore FieldTask™ automatically flags the offending activity for management review.
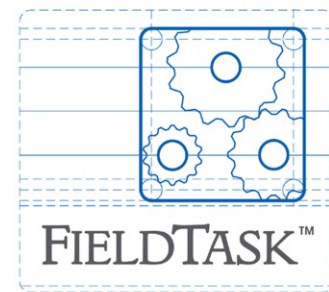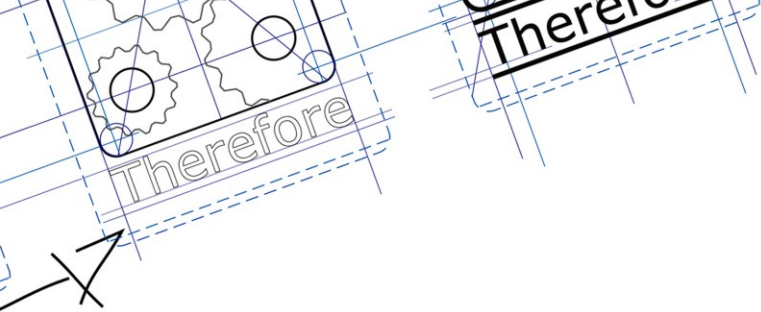
The Therefore FieldTask™ application's "Progress Status Early Warning" feature tracks progress relative to the passage of time and provides an early warning where tasks start to fall behind the curve. This allows for remedial action to be taken earlier in the task's life cycle.

Staying in the loop

The Therefore FieldTask™ tool's configurable communication cycle keeps users informed of status changes by means of email and SMS.

THEREFORE FIELDTASK™ FEATURES

Functionality on demand

No two Clients have the same needs. The Therefore FieldTask™ application's "Functionality on Demand" capability allows user utilities and system features to be turned on or off and configured in accordance with your requirements.
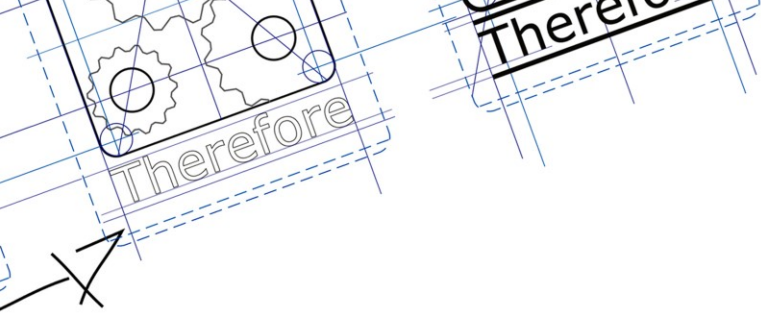
Provided below is a high level overview of the Therefore FieldTask™ application's user utilities and system features.

User utilities

Listed below are examples of the utilities that can be made available to users of the Therefore FieldTask™ application.

Task / Query utilities	Reporting utilities
Comments	Dashboard
Notes	Reporting
Reminders	External data cube feed
Reassignment	
Reclassification	**User utilities**
Attachments	
Rich text editor	User self-service
Sub activities	Management visibility
Ad-hoc email communication	Contact list
Ad-hoc SMS communication	
Context sensitive help	**Search utilities**
Change log	
Task flagging	Smart search
Progress status updates	Quick search
Duplicate checker	
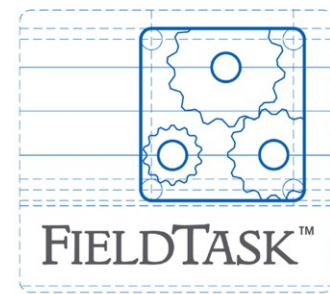
System features

In addition to the above listed user utilities, the Therefore FieldTask™ application boasts a number of system features that can be configured to ensure that the system's deployment is aligned to your needs. Examples follow.

Workflow engine

The Therefore FieldTask™ application boasts a fully integrated workflow engine.

The Therefore ThreadBuilder™ workflow configuration tool enables tasks and queries to be rapidly mapped to your business' processes, without introducing the need to write code.

User interface

The Therefore FieldTask ™ system provides various options for the "fine tuning" of its user interface.

Communication cycle

The Therefore FieldTask™ system's configurable communication cycle keeps Users informed of task and query status changes by means of email and SMS.

White labelled

Therefore FieldTask™ can be rapidly branded so that it carries your corporate identity.

Secure

Therefore FieldTask™ complies with best practice security principles. Further, its configurable password rules enable you to enforce a password rule complexity that is appropriate to your risk profile.
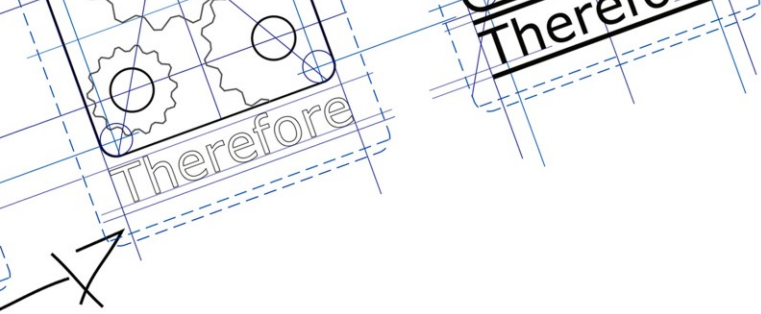
Therefore FieldTask™ supports the use of Digital Encryption.

The system's "Security Group" functionality allows you to easily allocate system rights to Users.

Integration

The Therefore FieldTask™ application features a host of integration points, enabling seamless integration with external systems, either on a periodic or a real time basis.
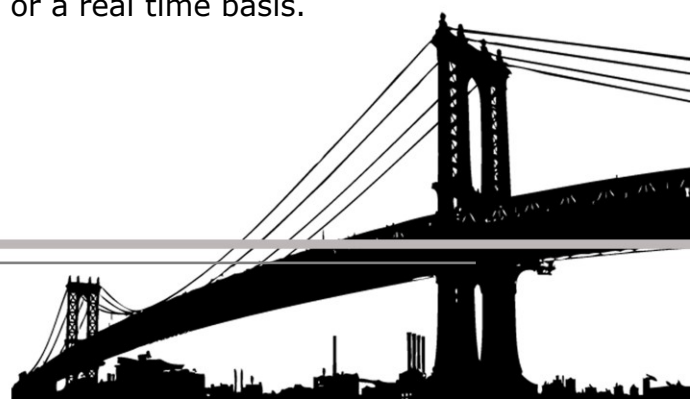
Cross browser compatibility

The Therefore FieldTask™ application has been developed to be accessible via any World Wide Web Consortium (W3C) standards compliant web browser, but has been optimised for the latest versions of the Internet Explorer, Mozilla Firefox, Google Chrome, Opera and Edge browsers.

CAN THEREFORE FIELDTASK™ HELP?

The Therefore FieldTask™ application is ideally suited for companies that...

- Have a field based operation that is core to their business models.
- Want to maximise their return on investment for field operation spend.
- Want to improve the efficiency of the back-office support structures available to their field operation teams.
- Want to enhance the quality of communication between their back-office and field operations teams.
- Require access to management data to improve the ease of management of their field operations.
- Require access to performance data to support the performance management of their field staff.
- Want to implement continuous improvement within their field based operations and therefore require access to service failure statistic to enable them to do so.

THEREFORE FIELDTASK™ IMPLEMENTATION

Methodology

Our tried and tested implementation methodology covers business analysis, configuration, setup, training and change management ... thereby ensuring that your Therefore FieldTask™ initiative delivers value immediately and that your team is committed from the onset.

Business Analysis

During the Business Analysis phase, we will work with you and your Team to understand your environment and needs.
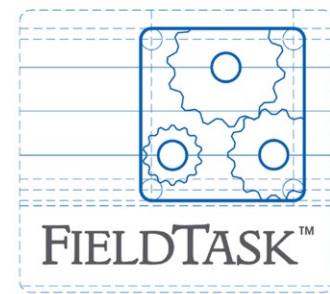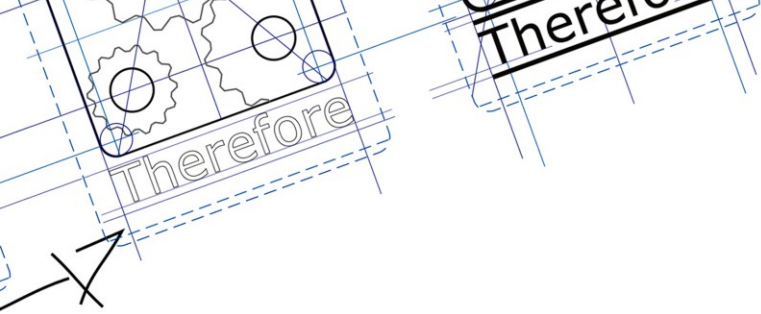
Configuration

Therefore FieldTask™ will be configured in accordance with the observations made during the Business Analysis phase. This configuration will take two forms…

- The Therefore Team will use the Therefore ThreadBuilder™ application to configure the business processes that will be deployed within your environment.
- The Therefore Team will use the Therefore FieldTask™ application's "Functionality on Demand" facility to turn off all functionality that you don't wish to use, thereby optimising the application's fit with your environment and enhancing its ease of use.

Setup

It is during this phase that your companies, branches, departments, access rules, users and the like are set up.

Training

Therefore FieldTask™ has been designed to be intuitive, which reduces the amount of user training required. However, as with the introduction of any application, a mix of formal and "on the job" training is critical to ensure that users become productive as rapidly as possible. Our training curriculum will be tailored to meet the needs of your environment.

Change management

Best practice change management principles are applied throughout the deployment of the Therefore FieldTask™ application.
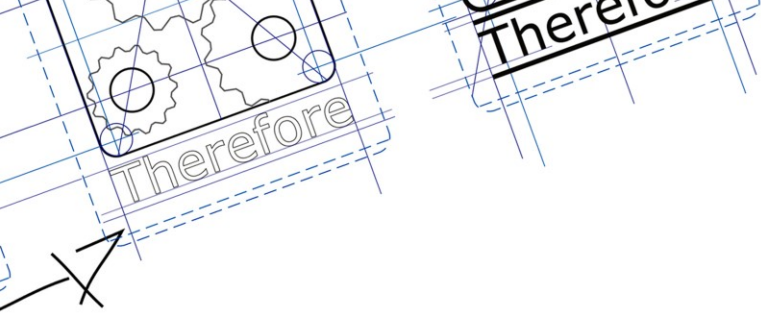
ABOUT THEREFORE

Introducing Therefore

Therefore specialises in developing and implementing Business Process Management (BPM) solutions. We have, over a period of some 13 years, developed our own BPM technology, which we use to assist our Clients to optimally manage their business processes.

We are in a unique position to be able to help our Clients to implement BPM solutions without having to make an extensive upfront investment in technology, given that we bill on a rental basis. Further, we are in a position to offer our Clients a fully outsourced solution, allowing them to retain their focus on what they do best.

Our technology has been developed to allow for rapid deployment, which allows us to add value earlier in the project life cycle.

Therefore BPM product offering

We have a number of product variants, which allows us to rapidly deploy niche solutions.

- Therefore Quantum™ - Call Centre Management Suite
- Therefore StratIQ™ - Strategy Management Suite
- Therefore HelpDesk™ - Help Desk Management Suite
- Therefore FieldTask™ - Field Task Management Suite

Further, our BPM technology is easily configured, which allows us to rapidly deploy mature Client specific solutions.

Consulting services

Therefore typically consults in areas that relate to the implementation of its BPM technology. We are, however, in a position to offer Clients consulting services of a more general nature, most commonly in the Information Technology, Supply Chain and Project Management space.

How can we help you?

We would appreciate the opportunity to schedule some time to walk you and your team through our product and service offering and to explore how we can unlock value for your organisation.
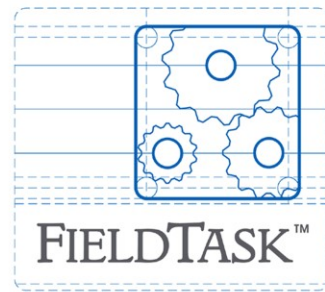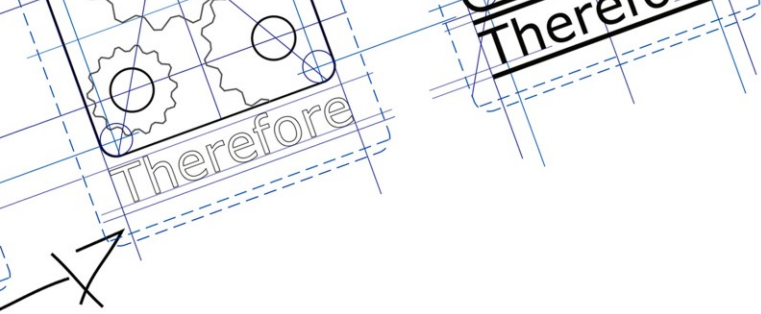
Feel free to give us a call if you think that we can be of assistance.

More…

To find out more about Therefore, please visit the Therefore website.

www.therefore.co.za

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Therefore FieldTask™:   www.therefore.co.za/FieldTask

More…

To find out about our other products, please visit the product websites detailed below.

Therefore StratIQ™:   www.therefore.co.za/StratIQ
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Therefore Quantum™:   www.therefore.co.za/Quantum

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