

Combining technology & culture change to transform field customer service

Outstanding service in the field requires both the harnessing of technology and embracing the human factor to satisfy customers and increase performance

During a workshop on field operations at the 2014 Planning Forum conference, the Service & Repair planning team at British Gas showed they had a three pronged attack when it came to transforming their performance. They changed the culture of their team, the organisational model and the operating model. This has much in common with Planning Forum awards' entrants from previous years eircom and BT and also UPC, which also shared their experiences in the workshop, deepening the understanding of what good looks like in this area.

Develop your own identity

In 2012, the planning team at British Gas was aligned to the operations field team. Recognising the importance of their people in transforming their approach to planning, they uncoupled from that position to establish a department in their own right. "What we heard was that our people didn't feel valued. Reorganisation gave us our own identity and culture, which was very powerful" Sara Patterson, Head of Operational Planning with British Gas.

Foster relationships within the field

The field teams were critical to building and maintaining strong relationships with our customers. It's therefore important for planning departments to take the time to understand their needs and organise and operate to support. Presently British Gas has 7500 field personnel plus 300 contractors dealing with 9-10 million customer appointments. Planning reorganised from four remote planning teams

looking after a quarter of the country to one central team with one planner owning a much smaller piece of geography aligned to the field organisation model. Leadership structures changed too allowing 1 - 2-1 relationship with the field at all levels. "Through strong governance, listening to our customer and regular communication with the field, we have achieved consistency: they know who deals with their patch," adds Patterson. Reinforcing the point Sean Murphy, Area Planning Manager adds, "We got out and saw people to build that trust and confidence." When you gain that trust, Murphy says, you've earned the right to start to challenge"

"We had to redress some unhelpful behaviours and go back to basics with the field," says Ian Noden, National Planning Manager with British Gas. "We took over national planning in February 2013. We delivered a better level of customer service by delivering a better level of planning. If you're not planning correctly, you're not going to see the end result change for our customers."

Irish utilities provider eircom, shortlisted for the Planning Forum awards in 2012, gained buy in from their field workforce, against a backdrop of general economic slowdown, high overtime costs, losing market share and criticism from the regulator. Through the Works Management Centre (WMC), the field operations management team controls work nationally, as opposed to locally. Field engineers work in 'softer' 50 mile boundaries rather than the fixed boundaries of

half the size they worked in before and their performance and their ability to take on more last minute jobs is more closely monitored through GPS. This created much greater flexibility in where the technicians could go and jobs that were geographically near could be better batched together.

How to achieve field service buy in

- Communication from senior management to the field
- Putting a face to the planner by regularly going out and seeing the field force
- Effective cascading of the message e.g. through monthly briefing packs
- Investing in people through training
- Planners working in a more cross functional way
- Using NPS as a method of process improvement

Using modelling

An external consultant helped eircom develop simulation models for capacity planning so the WMC could see the impact of decision they made. An annual plan, revised quarterly plus a weekly capacity plan and short interval controls such as location of overtime means resourcing is optimised, even for seasonal demand and emergency jobs.

Technology played a key part of British Gas's transformation of field service as well. Previously planning was very manual but the introduction of an in house built

Short Term Planning tool allowed process to be automated increasing visibility and control of the the 54 day tactical planning window. There was significant investment in planning both in personnel: twenty five new planners and five new planning managers were brought in, allowing those 1-2-1 relationships with the field, and by putting funds into forecasting intelligence, mainly around more accurate and timely weather information, a step change in demand forecasting has been achieved.

BT, which was shortlisted for a Planning Forum Award in 2013, also automated their workflow to better control field work. Its Field Optimisation Suite (FOS) runs a plan balancing service demand with resource supply automatically, leaving resource managers more time to focus on immediate or short notice issues. Availability can be switched around to suit sudden demand increases.

The audience in the field operations session agreed that many lessons can be learned regardless of the industry they operate in. Technology can enhance the field offer whether you are a utilities supplier or a retail operation.

Putting customers at the heart of field service

Becoming more customer focussed is at the heart of what many organisations want to achieve in the field. BT can now offer its customers a shorter window for visits thanks to its FOS' capability in reducing the time taken between when the request is made and the engineer finishes the appointment. At British Gas they are proactively phoning customers to see if they want their Annual Service, rather than reactively waiting until breakdowns occur. At Eircom, the

introduction of NPS has given valuable feedback for process improvement such as sending SMS updates and technicians carrying DSL modems with them as standard.

Investing in people can pay dividends in terms of morale. The agents' programme at British Gas is called 'Be Your Personal Best' and together with the leadership programme, 'Good to Great' the team delivered on their objective to be 'trusted to deliver and to be proud of their results'. From the lowest engagement result in the company, the latest result saw the department rise into the top quartile. At Limerick based UPC, which won a Planning Forum Award in 2014, an emerging leaders team encourages professional development. It really was the 'power of the firm' encompassing field technicians, telesales and websales to unleash potential.

The role of outsourcing

Outsourcing played a big part in UPC's roll out too. Half of its engineers are outsourced, so the manpower was there when required. As it turned out, UPC's self install rate was so successful, 10% above plan, that it was able to scale down the outsourcer when it didn't need as many installation visits. British Gas uses a small number of highly trained contractors too to help

resource to Winter peak demand, "It gives us flexibility to maintain service levels in Winter but must support our brand, our customers want and expect to see a British Gas uniform and a British Gas van," says Noden.

The importance of cross functionality

Cross functional working was really at the heart of UPC's success. The resource planning team was responsible for field technicians, IVR and routing, managing calls, even down to knowing how many the boxes which the Horizon technology was packaged were required and what the timeframe was for needing more boxes. Those in the field and in the call centre and in the management team talked, increased sales beyond expectation, improved self serve and created a blueprint for true success in the field.

UPC's success in numbers

- Sales 83% above forecast
- Self install delivered 10% above plan
- Revenue was 22% greater than forecast
- Call rate 30% below plan
- Failure rate 70% below plan

Digging Deeper on this topic

Case studies

eircom, (Best Practice Guide 2012 p.59). BT, (Best Practice Guide 2013 p.61). UPC, (Best Practice Guide 2014 p.89).

Online resources
see conference presentations.

