

# Managing Field Service Personnel Case Study

# Large UK Delivery Company

- Deliver >200 million parcels each year
- Network of >10,000 Couriers
- Managed by >400 Managers
- Managed Delivery solutions for many High Street names

# Courier Hierarchy

Divisional Managers



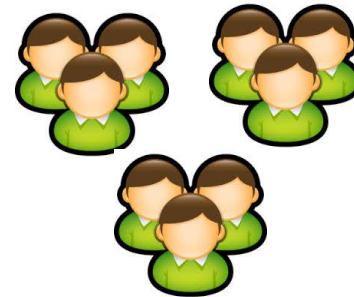
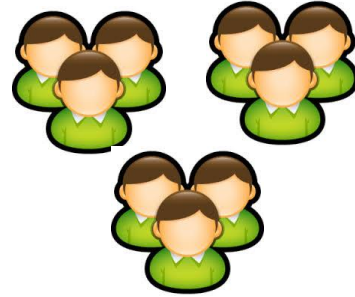
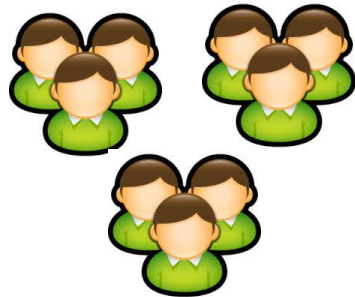
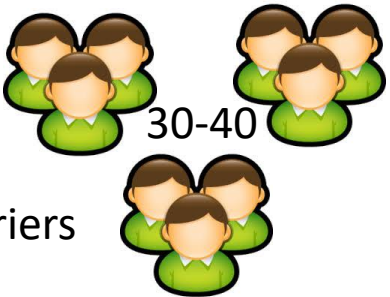
Regional Managers



Field Managers



Couriers



# The Problem

## Recruitment did not scale

- Long time-lag between needing a new courier and getting one
- Selection, Interview and Training took too long

## Performance Management

- Arbitrary and non-transparent
- Difficult to see the detail and relate to PM process

# The Problem

## Unsuitable Hardware

- Every Manager needed a laptop
- Daily operations mostly 'Offline'
- Information quickly out of date
- Inability to respond to problems in a timely manner
- Device management time consuming
- Hardware attrition very costly

# The Solution

## End-to-end Field Management System

- Integrated with Recruitment Process
- Integrated with Parcel Tracking Systems
- Service-wide Performance Management; Consistent & Transparent, 360° Process
- Real-time, Mobile App with Offline 'Store & Sync'
- Replace Laptops with Managed iPad estate
- *All Built on Force.com Platform*



# Built on Force.com Platform

- 75 Custom Objects
- 35 Apex Triggers
- 162 Apex Classes
- 51 Visualforce Pages
- 600,000 Characters of Code
- 1 Mobile App (iOS and Android)
  - Offline Store & Sync



# Field Management System

## Courier Lifecycle

- Recruitment
- Selection
- Interview
- Training
- Performance Management
- Financial Incentives
- Discipline & Exit





# Field Management System

## Field Managers



- Search New Applications in their area
- Interview Candidates
- Real-time Alerts & Notifications
  - Customer complaints
  - Failed deliveries
  - Exceptions, Prompts, etc.
- Real-time Performance Reports
  - Theirs & their couriers

# Field Management System

## Senior Management

- Summary Reports
- Management Information & KPI Reports
- Ability to Drill-down into Root Cause



# Performance Management

### MI Performance Review

**Courier Receipt Scan Performance %**

Total % of parcels not receipt scanned by courier by day						PTD %	
Day	Fri	Sat	Sun	Mon			
Date	01/01/2016	02/01/2016	03/01/2016	04/01/2016			
%	0.00	0.00	2.27	0.00			

Courier Receipt Scan FM Comments Not achieving SLA

**Courier to Customer Performance %**

Total % of parcels not delivered to customer by day						PTD %	
Day	Sat	Sun	Mon	Tue			
Date	02/01/2016	03/01/2016	04/01/2016	05/01/2016			
%	0.00	0.00	0.00	5.52			

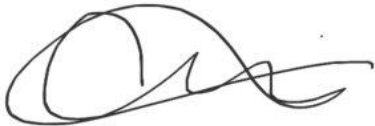
Courier To Customer FM Comments Not achieving SLA

**Manifested Collections Performance %**

Total % of collections not actioned by day						PTD %	
Day	Sat	Sun	Mon	Tue			
Date	02/01/2016	03/01/2016	04/01/2016	05/01/2016			
%	0.00	0.00	0.00	0.00			

Manifested Collections FM Comments Not achieving SLA

#### Courier Comments

Courier Comments	None
Courier Signature	No signature has been captured.
FM Signature	

}

Signature stored in Salesforce record

# Performance Management

Customer Enquiry Activity						
Enquiry Code	PTD	PTD %	PPTD	PPTD %	YTD	YTD %
A	0.0	0.0	0.0	0.0	0.0	0.0
B	0.0	0.0	0.0	0.0	0.0	0.0
C	0.0	0.0	0.0	0.0	0.0	0.0
D	0.0	0.0	0.0	0.0	0.0	0.0
E	0.0	0.0	0.0	0.0	0.0	0.0
P	0.0	0.0	0.0	0.0	0.0	0.0

Customer Enquiry Activity FM Comments: Achieving SLA

Bulk Catalogue	
Delivered On Time?	Yes
Confirmed Using HHT?	Yes
Receipt Scan Prior to Delivery?	Yes
Bulk Cat FM Comments	Achieving SLA

Service Performance														
Depot to Courier Performance %					Courier to Customer Performance %					Scheduled Collections Performance %				
	Target	PTD	PPTD	YTD		Target	PTD	PPTD	YTD		Target	PTD	PPTD	YTD
Day 1	98.5	99.9	99.91	98.29	E Day	98.5	100.0	100.0	98.29	E Day	98.5	100.0	100.0	97.85
Day 2	98.9	99.9	99.91	99.76	Day 1	99.9	100.0	100.0	99.87	Day 1	99.9	100.0	100.0	98.71
Outstanding %		0.1	0.09	0.24	Outstanding %		0.0	0.0	0.13	Outstanding %		0.0	0.0	1.29
Comments					Comments					Comments				

Tracking Point Usage												
Signature & Secure Delivery				Secure Deliveries (Defined)				Secure Deliveries (Other)				
	PTD	PPTD	YTD		PTD	PPTD	YTD		PTD	PPTD	YTD	
Total	897.0	1095.0	14401.0	Total	250.0	330.0	4663.0	Total	88.0	53.0	796.0	
%	91.07	95.47	94.01	%	25.38	28.77	30.44	%	8.93	4.62	5.2	

Tracking Point Usage FM Comments: Achieving SLA

# Performance Management

Daily Activities			
▼ Monday 14/03/2016			
Reference	Round	Name	Activity
MAE - 180325	E mails	From last	Week
MAE - 180326	Ops	500	Completed
MAE - 180327	RAw	Data	Enquires
MAE - 180328	Kpi	Wk 1	Pd1
MAE - 180329	Plan	Week	Ahead
MAE - 180330	Chase	Catalogues	For completion
MAE - 180333	Loading	Phone calls	E mails
MAE - 180335	Eta	Report	Courier contacted where fails
MAE - 180338	Pay	Re assign	Sunday round in the wrong names
MAE - 180339	East	3ps	Report
▼ Tuesday 15/03/2016			
Reference	Round	Name	Activity
MAE - 180466	Sub depot	Scunthorpe	Check all couriers compliant
MAE - 180475	908290	[REDACTED]	Enquires kpi
MAE - 180476	900397	[REDACTED]	Enquires kpi
▼ Wednesday 16/03/2016			
Reference	Round	Name	Activity
▼ Thursday 17/03/2016			
Reference	Round	Name	Activity

# Mobile App – Applicant Search

Home Recruitment Couriers Weekly Report Online Back Action ▾

## Application Search

Criteria Results

Clear ✕ Search 🔍

**FIRSTNAME**  
Enter firstname

**LASTNAME**  
Evans

**ADDRESS LINE 1**  
Enter address line 1

**ADDRESS LINE 2**  
Enter address line 2

**CITY/TOWN**  
Enter city/town

**COUNTY**  
Enter county

**POSTCODE**  
Enter postcode



# Mobile App – Applicant Search Results

Application Search				
Criteria			Results	
NAME	ADDRESS	STATUS	APPLIED	RECORD STATUS
evans	16 Somerset drive, Oxford, OX2 5SD	Partially Completed	17 March 2014	Synced
evanshaw	24 Bolton Ave, Bolton, B34 5SK	Partially Completed	20 June 2013	Synced
Evans	The Old Refectory, Green Lane, Ipswich, I23 5BA	Partially Completed	31 October 2013	Synced
David Evans	1 Whitehead, Street, M345NU	Applicant	31 May 2013	Synced
David Evans	16 Evergreen terrace, Springfield, S12 3GT	Accepted	24 March 2014	Synced
David Evans	1 Audenshaw, Manchest, M345NN	Accepted	24 March 2014	Synced
David Evans 2	2 Audenshaw h, Manchester, M345NN	Accepted	24 March 2014	Synced
evans Evans		Partially Completed	28 January 2014	Synced
John Evans	1 The Street		21 March 2014	Synced
Peter Evans	65 Braintree Rise, London, E14 5AC	Partially Completed	17 March 2014	Synced
Richard Evanss		Partially Completed	21 March 2014	Synced
Richard Evans	26 Marlborough Close, Manchester, Lancashire, OL7 0HT	FM Reviewed	16 April 2013	Synced
Richard J Evans	58 Aldwyn Park Road, aide shaw, Manchester, M345NU	Accepted	2 July 2013	Synced



# Mobile App – Create New Application

Home Recruitment Couriers Weekly Report Online Back Action ▾

## Create Application

There are validation errors below. 25

Application Detail

**Criminal Record Check**

If **YES**? Please redirect the applicant to the recruitment web page.

**Applicant Details**

**TITLE**

--select title-- ▾

**FIRSTNAME**

Stephen

**LASTNAME**

Smith

**ENQUIRY TYPE**

--select enquiry type-- ▾



# Mobile App – View Applications

Home Recruitment Couriers Weekly Report Online Back Action ▾

## View Application

Record was saved successfully. 0

Application Detail Interviews

Submit to Loading

**Criminal Record Check**

If **YES?** Please redirect the applicant to the recruitment web page.

**Applicant Details**

**TITLE**

--select title-- ▾

**FIRSTNAME**

Stephen

**LASTNAME**

Smith

**ENQUIRY TYPE**

# Mobile App – Conduct Interviews

Home Recruitment Couriers Weekly Report Online Back Action ▾

## Create Interview

There are validation errors below. 1

Interview Detail

**Interview Information**

**DATE AND TIME OF INTERVIEW**  
3 Apr 2014 07:59 ▾

**INTERVIEWD BY**  
enter interviewed by name

**INTERVIEW TYPE**  
--select title-- ▾

**INTERVIEW STATUS**  
--select title-- ▾

**PAUSED/TERMINATION REASON**  
--select title-- ▾

--select title-- ✓  
Paused  
Completed  
Terminated

# Mobile App – Conduct Interviews

Home Recruitment Couriers Weekly Report Online Back Action ▾

Create Interview [Clear](#)

Mon 31 Mar	04	56
Tue 1 Apr	05	57
Wed 2 Apr	06	58
Today	07	59
Fri 4 Apr	08	00
Sat 5 Apr	09	01
Sun 6 Apr	10	02

There are validation errors below. 1

Interview Detail

DATE AND TIME OF INTERVIEW

3 Apr 2014 07:59 ▾

**INTERVIEWD BY**

enter interviewed by name

**INTERVIEW TYPE**

Applicant Interviewed - Telephone ▾

**INTERVIEW STATUS**

Paused ▾

**PAUSED/TERMINATION REASON**

--select title-- ▾

# Mobile App – View Previous Interviews

Home Recruitment Couriers Weekly Report Offline Back Action ▾

## View Interview

Record was saved successfully. 0

Interview Detail Signatures

**Interview Information**

**DATE AND TIME OF INTERVIEW**

**INTERVIEWD BY**

**INTERVIEW TYPE**

Applicant Interviewed - Telephone ▾

**INTERVIEW STATUS**

Paused ▾

**PAUSED REASON**

FM Paused Interview ▾

# Mobile App – Capture & Save Signatures

Applicant Signature

×

Signature

FM Signature

×

Save to PDF

# Mobile App – Offline Store & Sync

Home Recruitment Couriers Weekly Report Online Back Action ▾

## Synchronise Offline Activity

Synchronise ↗

TYPE	STATUS	MESSAGE
Application__c	locally created	message...
Interview__c	locally updated	message...
Interview__c	locally created	message...

# Mobile App – Offline Store & Sync

Home Recruitment Couriers Weekly Report Online Back Action ▾

## Synchronise Offline Activity

Synchronise ↗

Progress bar: 40% complete


TYPE	STATUS	MESSAGE
Application__c	synced	message...
Interview__c	locally updated	message...
Interview__c	locally created	message...

# Mobile App – Offline Store & Sync

Home Recruitment Couriers Weekly Report Online Back Action ▾

## Synchronise Offline Activity

Synchronise ↕



TYPE	STATUS	MESSAGE
Application__c	synced	message...
Interview__c	synced	message...
Interview__c	locally created	message...



# Mobile App – Offline Store & Sync

Home Recruitment Couriers Weekly Report Online Back Action ▾

## Synchronise Offline Activity

Synchronise ↗

TYPE	STATUS	MESSAGE
Application__c	synced	message...
Interview__c	synced	message...
Interview__c	synced	message...