



Six Steps to a Winning Business Case for Sourcing & Managing On-Demand IT Field Service Professionals

BUILDING A BUSINESS CASE FOR AN
AGILE FIELD SERVICE WORKFORCE

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THERE'S A BETTER WAY TO SOURCE AND MANAGE YOUR IT FIELD SERVICES.

IT STARTS WITH A BUSINESS CASE.

Are you overpaying for IT field service talent and exposing your organization to unnecessary compliance risks? Now there is a better way. You can access an active, growing network of thousands of skilled, carefully vetted, and correctly classified independent contractors to support your field services program. Here's how it works, and how to make the business case for your company.



By 2020, industry experts predict that independent workers will make up between 20 and 40 percent of the total U.S. workforce. The vast majority of organizations can't effectively engage this important segment of highly skilled workers—much less create an optimized talent network that includes them.

To tap into this growing pool of skilled resources, programs are designed to meet the needs of all organizations—from small startups to mature enterprises. Stepping outside the boundaries of costly and limiting traditional workforce models, a work automation platform solution provides serious flexibility and savings while increasing service quality and performance.

For companies solely using traditional field service workforce models (FTE and W-2 employees), building a business case for a work automation platform to leverage a variable workforce and increase your flexibility can seem daunting. It doesn't have to be.

That's why we have compiled these thorough, but simple, instructions for building a successful business case. It will help you:

- Ask the right questions
- Supply the right answers
- Identify risks, rewards, and ROI projections
- Assemble and organize all the elements you will need to win executive approval for a work automation platform solution for IT field services sourcing and management

SIX STEPS TO A WINNING BUSINESS CASE

- 1.** ASSESS YOUR CURRENT STATE
- 2.** ENGAGE STAKEHOLDERS
- 3.** PRIORITIZE GOALS AND OBJECTIVES
- 4.** DEFINE REQUIREMENTS
- 5.** SELECT A SOLUTION PARTNER
- 6.** BUILD AND COMMUNICATE YOUR CASE

STEP 1. ASSESS YOUR CURRENT STATE

If you do not know where you are, it's hard to get where you want to go. So the critical first step toward a winning business case is to develop the best possible understanding of your current field services sourcing and management processes. This requires gaining visibility into objective data, including headcount, current spend, utilization rates, response times, first-time fix rate, business rules and processes, and subjective information, such as known inefficiencies, rogue spending, and other pain points.

Many organizations find this difficult. As one client noted, "The biggest challenge was in understanding our current state well enough to be able to develop the solution to meet our requirements. It was a struggle to gather all of the information."

TAP STAKEHOLDERS FOR INFORMATION

To facilitate the data-gathering process, you must designate contacts from key functional areas (IT, operations, human resources, procurement, dispatch managers, finance, legal, security) across all applicable business units. Since each of these functions has a stake in the outcome, these contacts should provide you with the data and insight you need from an internal perspective.

You will need to know:

- Spend under management
- Number and types of field service workers
- Business rules
- Field services dispatch strategy
- Utilization rates
- Response times
- First-time fix rates

These factors should be itemized by:

- Geographic region
- Business unit
- Trends over time

Your analysis should also include any known issues, such as:

- Compliance concerns
- Security problems
- Integrity risks
- Process gaps, redundancies, or incompatibilities

SUPPLY CHAIN INPUTS

As well as probing your internal sources for an understanding of your current state, it is also important to solicit input from your workforce supply chain. If you are sourcing technicians on an hourly or project basis, your partners and suppliers should be able to provide relevant information, including:

- Headcount
- Turnover
- Skill sets
- Cost structures
- Financial metrics
- Invoicing methodology

IDENTIFY PAIN POINTS

As you collect objective data about current methodology from your stakeholders, also solicit their opinions about what causes them pain. It's not enough to understand how your processes currently work. It is important to know what doesn't work, and why.

A thorough discovery process that incorporates the individual concerns of all stakeholders will not only help you set your on-demand staffing priorities, it will also help you recruit supporters for your business case throughout your organization.



STEP 2. ENGAGE STAKEHOLDERS

Once you have a solid understanding of your current situation, you can begin taking steps towards your future state. Before evaluating potential work automation platform, it is essential to engage internal partners who can help define the projected scope of the program and ultimately drive its adoption.

IDENTIFY KEY STAKEHOLDERS

All organizations are structured differently, but there are some universal truths when it comes to choosing the right stakeholders. According to Staffing Industry Analysts, engaging functional leaders from operations, procurement, human resources, and enterprise resource planning (ERP) departments is critical. Their knowledge and buyin can be a preeminent driver of the success for any non-employee workforce program.

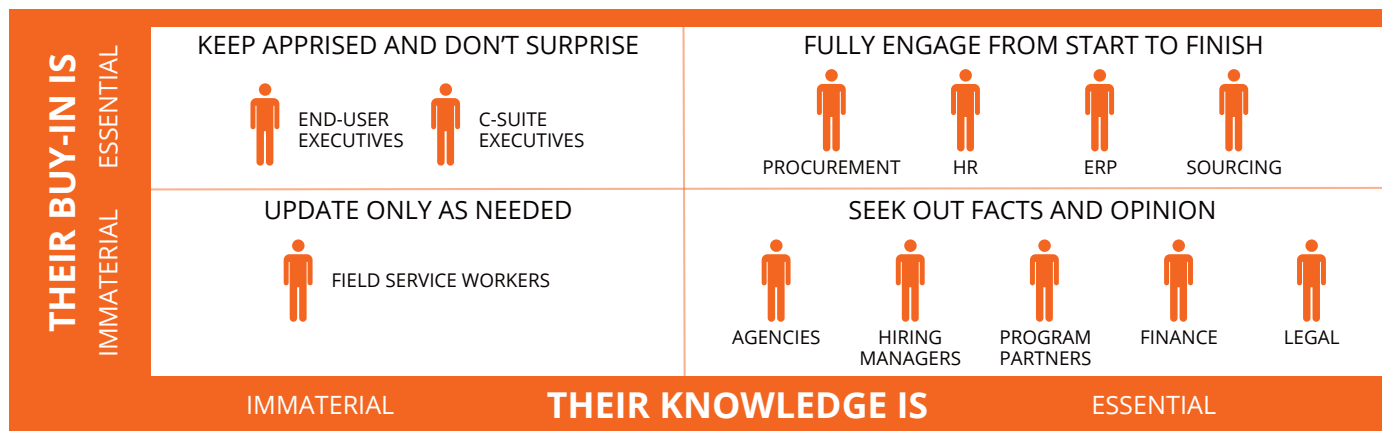
Stakeholders from these departments must be fully engaged from the start and should provide their insight into the scope of your service program. If you have involved them in the factfinding process to define your organization’s current state, they should be well prepared to provide recommendations that will help define your program’s goals and objectives.

SHOW BENEFITS TO OTHER STAKEHOLDERS

Other internal groups that should provide facts, opinions, and guidance are managers in IT, finance, security, and legal. These departments can help define what needs to be improved and any potential risks. They are also more likely to support the program if they understand how your work automation platform will benefit them.

In addition, finance can play a key role in your business case development by helping to define investment risk and benefit estimates as well as ROI methodology. Remember, there are no facts in the future, only estimates. As such, your business case should identify four elements:

1. Scope of deliverables, in terms that sponsors and approving authorities will understand
2. Major milestones that are meaningful to the business
3. An assessment of risk factors that affect both investment and benefit estimates
4. A specific proposal for ROI, both in financial terms and as measurable improvements in key performance indicators (KPIs)



THE ROLE OF THE EXECUTIVE SPONSOR

Executives and senior leaders provide the authority and credibility needed for a major organizational change to be successful.

Because the change involves new processes, new systems, and possibly new organizational structures, senior leaders must demonstrate their personal commitment as well as the organization's commitment to the change.

To implement a work automation platform in your organization, your executive sponsor should be a key stakeholder in the success of the system—probably a senior executive in the company's IT, operations, procurement, or human resources department.

The sponsor must be in the right position to authorize resources and provide guidelines needed to shape decision-making at all levels, empower people, and reward achievement. The sponsor must also be able to rally the organization's senior leadership in support of the initiative. If the organization's executive stakeholders don't visibly promote and support a work automation platform for field services sourcing and management, it is highly unlikely that those beneath them will do so. If that happens, the program will never be able to provide its full value to the business.



STEP 3. PRIORITIZE GOALS AND OBJECTIVES

The pace of business today is changing the way we work. More and more, service organizations need a highly flexible, cost-effective alternative to traditional workforce models to support on-demand workforce needs, including unanticipated surges in demand, large deployment projects, seasonal or cyclical spikes, geographic or skill-set gaps, as well as cost-effective, low-risk expansion to accommodate growth. For field service assignments, independent technicians acting as an extension of your workforce are often the best solution. But that's only possible if you have a reliable way to source and manage the best talent.

Thanks to proven methodology, it is now possible to engage, manage, and pay your independent workforce from a single online staffing platform. Potential benefits include:

- Improved access to qualified talent
- Reduced overhead costs
- Eliminate rogue spending
- Risk management, including proper worker classification, and the protection of workers' compensation, general liability, and errors and omissions insurance protection
- Improved efficiency by using proven, streamlined web-based tools to source, engage, manage, and pay field service technicians
- Increased customer satisfaction through reducing response times
- Increased technician utilization rates
- Improved first-time fix rates

RANKING PROGRAM OBJECTIVES

With all that a work automation platform can do for your company, how can you set priorities? The answer is to start with the five major reasons companies choose to implement an automated solution:

- Control costs
- Increase flexibility
- Improve efficiency
- Enhance quality
- Provide better visibility
- Ensure compliance

All of these are important to your organization. But it is important to determine which of these factors are most critical to your ability to achieve your business goals. When you have set your priorities, it will be much easier for you to work with a potential solution partner to implement the system that will best meet your needs.

Let's consider the elements of each of the major benefits of implementing an on-demand field services sourcing and management solution in order to determine how they might rank among your organization's priorities.

COST CONTROL AND EFFICIENCY IMPROVEMENTS

For many organizations, one of the most significant impacts of streamlining and automating the field services sourcing and management process is the potential for cost savings, which can often be achieved with minimal capital investment.

By substituting directly sourced field technicians for techs provided by staffing firms, organizations can typically save 30% on labor costs while minimizing or eliminating travel expenses. With our platform, field service managers can better calibrate supply with demand and radically improve technician utilization rates.



BETTER VISIBILITY

At any point in time, gaining visibility into who, what, when, where and why workers are in your company is a huge concern, not only for security and compliance reasons, but also for cost and quality control.

Manual contractor management processes cannot provide this visibility, but a automated work automation platform solution can. A full-featured solution can track all of your technicians. It can also provide the analytics and business intelligence needed to identify potential compliance risks, cost savings opportunities, and process improvements.

Visibility into where and how your organization spends money on field services is an essential step towards making better decisions for the future.

REDUCING COMPLIANCE RISKS

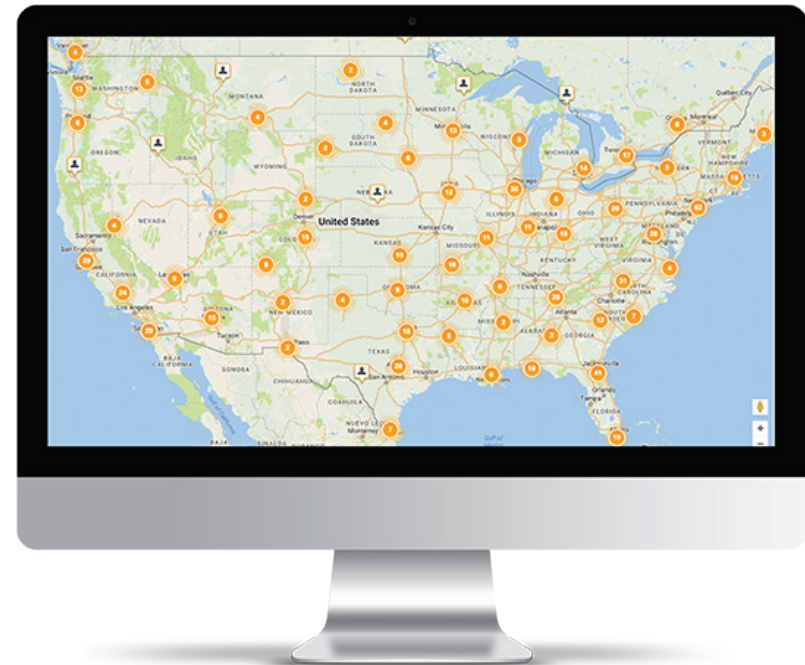
Regulatory compliance requirements have grown exponentially and touch all operational areas within an organization. Compliance has become increasingly complex and expensive, and operational impacts can be difficult to identify and track. For companies that manage workforce compliance issues manually, operational costs are high, compliance requirements and timelines can be missed, exam and audit exceptions occur, and liability risk increases.

Organizations whose businesses could be severely affected by compliance issues—especially organizations subject to the regulatory, auditing, and reporting requirements of multiple governmental entities — should rank compliance very high on their list of priorities.

STEP 4. DEFINE REQUIREMENTS

Before building a house, the owner, architect, and builder must agree on all the essential elements the house will contain. This blueprint will serve as a guide throughout the building process. It may be modified as construction proceeds, but the more complete and accurate the blueprint is, the better chance you have of achieving your goals on time and within budget.

It is the same way with a work automation platform implementation. The better you can define your requirements, the more likely you will get the solution your organization needs.



STEP 5. EVALUATE AND SELECT A TRUSTED PARTNER

Armed with a thorough understanding of your current state and a vision for your ultimate destination, you should now be ready to evaluate and select a potential work automation platform partner. However you review potential partners, the right partner is the one that can help you bridge the gaps from your current situation to the desired future state in terms of both process and quality.

PROCESS GAPS: Every field services operation is different, but the right partner should be able to transform your traditional staffing process into a streamlined operation that takes the burden off your internal staff.

QUALITY GAPS: In addition to implementing a more efficient and cost-effective sourcing and management process, your solution partner should be able to show you how to raise the quality of your field services program. The quality goals you uncovered by engaging your stakeholders will be unique to your company, but you should ensure the partner you select is in alignment.

FIVE CONSIDERATIONS WHEN SELECTING A WORK AUTOMATION PLATFORM

The number of on-demand staffing solutions providers is growing, ranging from established, publicly traded companies to venture-backed start-ups. Because a field services sourcing and management solution represents a long-term commitment for your company, you will want to choose wisely. Important considerations include:

1. TRUSTED PARTNERSHIP COMMITMENT

It's critical to find an organization willing to invest in a long-term relationship with your company and nimble enough to work through any organizational changes over time.

2. FINANCIAL STABILITY

Your partner should be a viable choice for today, tomorrow, and well into the future. You should never have to worry about your partner's ability to meet its financial or operational commitments.

3. FLEXIBILITY

Your solution provider should have a dedicated team and track record for understanding and anticipating market trends, including the variable workforce model and how best to source on-demand talent.

4. VISIBILITY

Robust reporting and analytics capabilities are critical to maximizing the value of your investment. Ensure that your partner can support your current and future business intelligence requirements.

5. EASE OF USE

The work automation platform should be intuitive enough so that your users can learn about 90% of the functionality on their own. Professional training, online help and tutorials, and help desk assistance should be available to supply the remaining 10%.



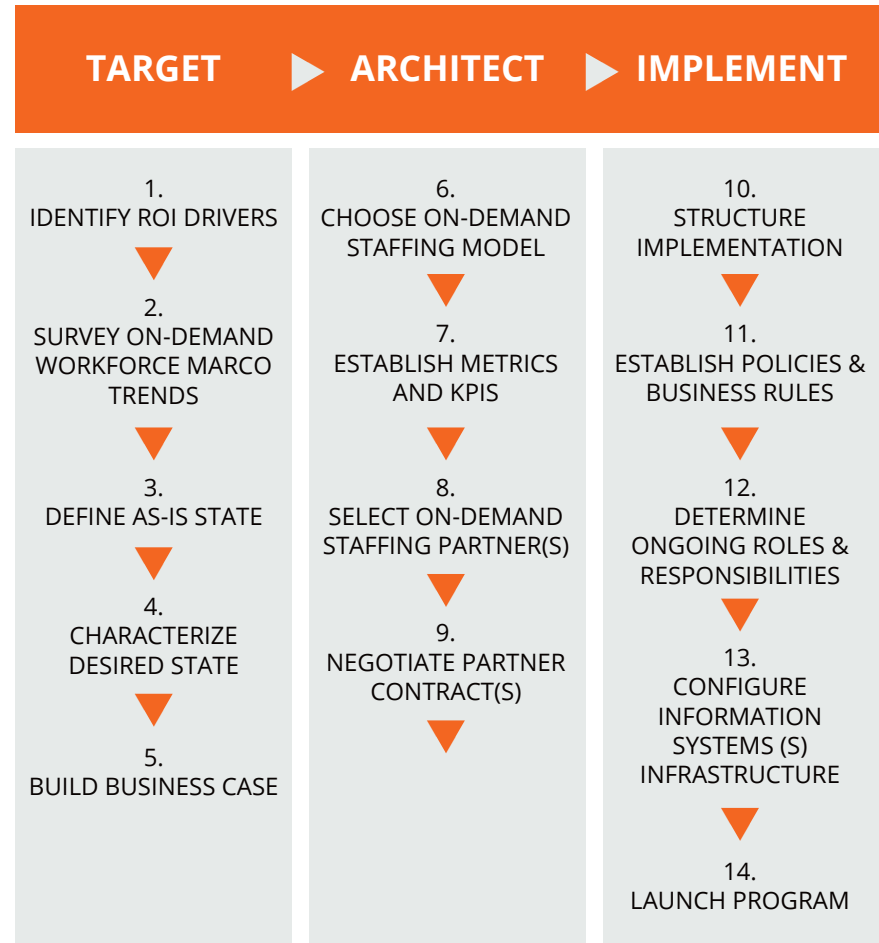
STEP 6. BUILD AND COMMUNICATE YOUR CASE

Building a business case isn't rocket science, and it shouldn't be intimidating. While your organization may have some specific content and formatting requirements, in essence your business case should:

- Describe the problem
- Propose the solution—with detailed deliverables and implementation plans
- Estimate the risks and costs
- Show how the benefits will recover the investment (ROI) in both direct financial terms and in more abstract, but still measurable, improvements such as improved KPIs

As you construct your business case, you should keep in mind the opportunity cost—and organizational risk—of NOT implementing a work automation platform.

Companies are accelerating their use of on-demand talent, both to gain and protect their competitive positions. If you understand the powerful benefits a work automation platform solution can offer your company, you can seize the advantages they offer, rather than cede them to your competitors.



THE IMPORTANCE OF COMMUNICATIONS

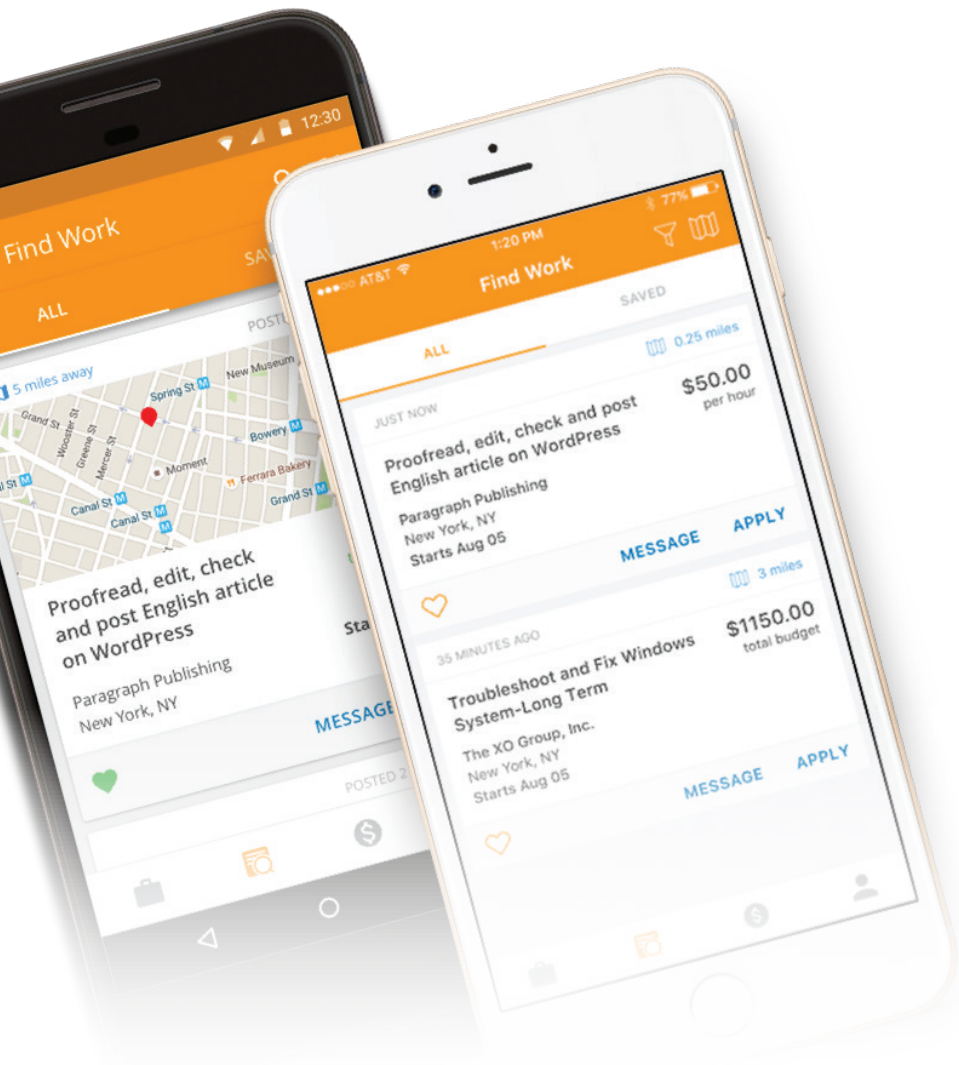
Even after you have chosen your partner, signed your contracts, and undergone implementation discussions, the challenge of cultivating a business case does not end. Instead, it actually intensifies. Now you must continue to sell the program to your stakeholders and end-users to ensure that you get maximum value from your investment.

Your partner can help you craft and deliver these communications, but ultimately it is your responsibility to make sure these messages resonate with your end-users and inspire confidence in your program. If you have secured executive-level buy-in early in the process, you will increase your chances of success, since having a C-level champion will help others to see the value and importance of the program.

WHEN IS THE RIGHT TIME TO START BUILDING YOUR BUSINESS CASE? RIGHT NOW.

When it comes to sourcing and managing your field service technicians, adopting an effective automated solution is no longer a luxury—it is a business imperative. Start building your business case today to stay ahead of your competition.





ABOUT WORKMARKET

WorkMarket has set out to build a brighter future for work. Partnering with innovation leaders like Accenture and ServiceNow, WorkMarket helps enterprises transform their operations from the cloud up, opening a new world of productivity and profitability. By focusing on the fusion of a flexible workforce and work automation technology, WorkMarket's cloud-based software sets new standards for modern competitiveness. From Enterprises looking to achieve more with less, to highly skilled independent professionals seeking compelling contract work, the WorkMarket platform streamlines management for a modern workforce.

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