Field Service Accelerator for Energy Auditors

Optimize Customer Experience: Efficient Management of Energy Auditors

Eco-friendly initiatives are the need of the hour, and energy companies and utilities are striving to reduce their carbon footprint. In addition to tweaking their products and looking at alternative energy sources, businesses are deploying Energy Auditors to help consumers and enterprises evaluate their operations for opportunities to save energy costs. Whether they employ Energy Auditors or hire third-party firms, efficiently scheduling Auditors for field engagements becomes an operational necessity that has to provide a positive customer experience.

How can

- we efficiently deploy our workforce without burning them out?
- we exceed customer expectations for service and on-time delivery?
- our mobile workforce also become sales agents?
- we keep our mobile workforce flexible?

Mastech InfoTrellis Field Service Accelerator for Energy Auditors with Oracle's Field Service Cloud

Energy Auditors combine a rare skill set of consulting, installation, and customer service. Unlike the standard installation engineer, consumers and businesses expect higher professionalism, bedside manner, and quality of work. We help firms that deploy Energy Auditors increase their customer satisfaction levels with a combination of mobile digital technology and consulting services.

Appointment Scheduling

No matter how extensive, many CRM programs may not have the functionality to effectively schedule appointments for audits. We can assist by extending existing CRM applications or providing new CRM applications that facilitate key appointment scheduling features.

- check workforce capacity to avoid overscheduling
- Send appointments to a routing engine
- Receive updates on appointments, including no shows or last-minute cancellations
- Manage inventory for the auditor and the customer
- Multi-channel capability to take appointments includes phone, mobile, and web self-service.

Routing

Our solution uses complex capacity algorithms that use intelligent routing optimization software to assign work using GPS mapping, workforce skill sets, workload balancing, issue severity, customer requests, and preferences.

- The system considers the auditor's current workload for the day and how far each appointment is from their other appointments.
- Over time, the system will learn how long the various types of audits take for different individuals and use those metrics as input to the routing assignment.
- Subsequently, a route for each employee is created that shows the number of customer appointments for each day, taking into consideration any internal activities like lunch, meetings, or equipment maintenance.

Dispatch

We provide full-featured dispatch functionality to help our clients manage their workforce. We help dispatch becomes the central hub between customer service and the mobile auditor workforce by

- Helping field auditors with their questions on the field
- Reassign activities based on cancellations or no-shows
- Re-route appointments if there are possible delays on their route
- Add resources to the route or approve overtime

Mobile Applications

With the proliferation and cost-effectiveness of mobile devices and communications, mobile workforces do not need to be kept out of the loop any longer. Our mobile application allows mobile workforces to

- view their appointments and the customer information the expected travel time between sites and expected service windows
- any special equipment or directions for the jobs record the results of their audit
- collaborate with other auditors (or dispatch) if they need help with a job, need to ask questions, or maybe even need to borrow equipment.

It can be challenging to manage the mobile energy auditor workforce to avoid wasted labor costs and missed customer expectations, and we provide a holistic solution from scheduling to dispatch to timely delivery to customer communication for energy consultants and auditors for a seamless customer experience.

Get in touch for an end-to-end solution to empower your mobile energy auditor workforce.