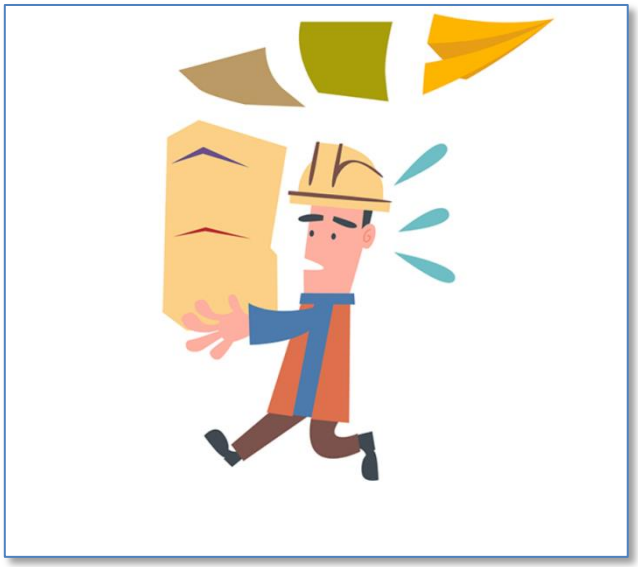
ELECTRICAL CONTRACTOR
POWER & INTEGRATED BUILDING SYSTEMS



Paper-Free

Mobile Apps And Software Save Contractors Time And Money

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By Claire Swedberg

Paperwork is vanishing from desks in contractor offices and from the hands of contractors on the job site. The shift to digital, however, can be hard to navigate. A host of software solutions and mobile apps are available, but not all are created equal. How does a contractor prevent the mistake of spending thousands of dollars on a convoluted system that doesn't provide any benefit?

The need for some kind of solution is growing. First of all, paper is expensive—for every job, purchase order and inventory list, the paper being purchased and printed is costing the company money. In addition, the risk of loss increases every time paperwork is moved.

Good software, on the other hand, typically reduces staff-labor hours dedicated to inputting data by about 30 percent, said Damien Moriarty, service delivery manager, Retriever Communications. He sees that kind of reduction among Retriever's electrical contractor customers.

A quality solution might offer a way to easily input and collect tasks, include spatial details based on geolocation, and identify the tasks that need to be completed next. For instance, users can follow a drop-down menu of equipment that is being installed, inspections that need to be done or other deadlines to consider.

"The key thing is to assess who you're automating, who you're making life simpler for," Moriarty said. "There could be 1,000 workers in the field."

A good solution will ease the data collection or input for as many of those workers as possible.

Training system users is an important part of the process, and it's not just the older electricians and managers who need it. In fact, often the 25-year-old who is convinced he or she knows everything might need the most training.

"There's a curious trend toward zero training," Moriarty said, adding that even those who think they understand all the technology will need to know how their daily tasks might change. "You'll get a mix of people who have questions about how to use an app and those who need to know how they will be doing their work from here on out."

Retriever Communications focuses on training the trainer. Electricians will listen to someone they respect, Moriarty said.

One common concern among users on the work site is how the system is tracking them. Some apps make it possible to know who has completed which tasks, when and how fast. In some cases, apps note the user's on-site location and when they go to an unauthorized area.

To address these concerns, managers should stress that the technology intends to benefit workers rather than penalize them.

The methods for implementing a paper-free system can vary, but technology providers advise contractors to focus on the least stress-inducing option and work their way to the more complex, which typically means a phased approach.

Andy Lambert, Penta Technologies

"The key point is that you are making life easier, and there will be better acceptance, better productivity and better returns if the [electricians] understand that," Moriarty said.

The technology can also be used to track safety procedures, and, for that reason, Moriarty believes the Occupational Safety and Health Administration (OSHA) may someday require apps to track how systems are installed, when they are inspected and other safety-based processes.

The hurdles and the initial high jump

According to Rachel Schmidt, marketing associate for field service software company Wintac Software, the three most common headaches that electrical contractors encounter when moving out of an all-paper system involve getting data transitioned from paper to digital, overcoming false expectations and getting the support they need as the system goes live.

“It’s normal to forget that, when you open up the software for the first time, it’s blank; there’s no data or information in it,” Schmidt said.

Depending on how lengthy the paper trails are, for some, this complication could delay the transition because they need to enter all their paper invoices and customers into the system.

Not many contractors know their way around the software before they acquire it, so, at first, a learning curve can slow the adoption or limit the way they use the system. Also, many users may expect the software to run itself.

“Software will help you run and better manage your business; it won’t do your job for you,” Schmidt said. “As we like to say, ‘Put crap in, get crap out.’”

If a company already runs like a well-oiled machine and inputs useful information, it will quickly see good results from the software.

“If you’re properly utilizing an all-in-one system, you’ll certainly become more profitable,” she said. “But, it doesn’t happen overnight, and it won’t do anything for you that you don’t tell it to do.”

Because of the learning curve, it’s important to choose providers who offer live support and assistance along the way. Once contractors become reliant on a software solution, they need available tech support when there’s a problem. - Wintac is a solution provider that offers live, unlimited technical support, so a contractor can call in and speak with someone in less than five minutes.

“To ensure that our customers are able to get up and running with software as soon as possible, we provide learning guides within the software itself, offer webinars and training videos, and live one-hour training sessions, all in addition to the live phone support,” Schmidt said.

There is no one-size-fits-all solution when it comes to field-service software. One electrical contractor’s needs could be vastly different from another.

“Regardless of why they’re looking for software or the size of the business, it’s important to really understand the business’ processes in the areas where improvement is needed,” Schmidt said.

Once a holistic picture is painted, the organization can begin to understand how specific solutions will fit their business and employee needs.

Growing into it

At the small and medium-sized business level, there’s really no right or wrong way to implement a solution. However, implementation becomes more complex at the enterprise level.

With Wintac specifically, since the mobile web portal integrates with the software, “implementation is simple and seamless, and we help you through the process,” Schmidt said.

In a more general sense, though, for users who have chosen an all-in-one solution that they intend

to grow into, some functionality might be more robust than they need initially.

“To avoid being overwhelmed, we suggest that our users start by mastering the features they need most,” Schmidt said. “Once they are comfortable with those, they can then begin to explore the features that were a nice ‘extra’ or bonus to have.”

Sometimes users will get comfortable with the software first then add the mobile component if and when they’re ready.

Mobility for electrical contractors’ means technicians have the ability to work in real-time and have access to vital customer and job information while on-site. This advantage allows many electrical contractors to stay competitive in the industry.

The trend toward mobile isn’t going to change soon, especially as technology becomes more prevalent and affordable. If you want to stay competitive, making this switch will be inevitable, Schmidt said.

The methods for implementing a paper-free system can vary, but technology providers advise contractors to focus on the least stress-inducing option and work their way to the more complex, which typically means a phased approach.

“People tend to stress out if they start with complex work flows,” said Andy Lambert, director of account management at Penta Technologies.

The best alternative is to consider an easy first step with which all stakeholders get the most benefits. He recommends a “crawl-walk-run” process to get fully invested in a solution.

The first (crawling) stage focuses on linking and retrieving documents, such as those used for accounts-payable invoicing, electronically. In addition, solutions, such as those offered by Penta Technologies, can provide a single repository for all documents so that, as the company expands its use of the technology further into the job site, a project manager on-site can send pictures and other documents using Android-, iOS- or MS Office- based systems to be shared with interested parties.

Already in the first phase, “the company itself becomes more efficient and reduces the low-value, low-efficiency tasks,” Lambert said.

Learning to walk

Companies can build on the early knowledge gained from phase one and move into a second (walking) phase of their deployment by introducing more functionality. For instance, the system can begin generating forms, automatically, as preprogrammed. This kind of automation could help the generating of material and equipment or paid-time off requests. Those requests are then also automatically documented. Filling out forms is simplified, and alerts can be sent automatically if the usual workflow is not being followed.

The third (running) phase of a paperless system would include more complex workflow tools, creating forms that could be forwarded to multiple departments at the point at which each party requires them. CAD drawings can be managed and shared with the appropriate individuals at specific phases of a project, for instance.

“We’ve seen people using these workflow tools becoming more efficient, and that’s where people save the most money,” Lambert said.

He said some contractors take the next step and look beyond their own departments within the company and share documents with suppliers, other subcontractors, architects, engineers or even a general contractor or owner, anyone who has a stake in the project.

“We’ve seen people set up collaborative systems with Intranet sites to share electronic documents,” he said.

http://www.ecmag.com/section/your-business/paper-free

That means users will need a software system with good portals, since sharing data will require the portal for employees, suppliers or other contractors.