# TeamPilot

A smarter way to manage field team and services



## **Field Service Challenges**

















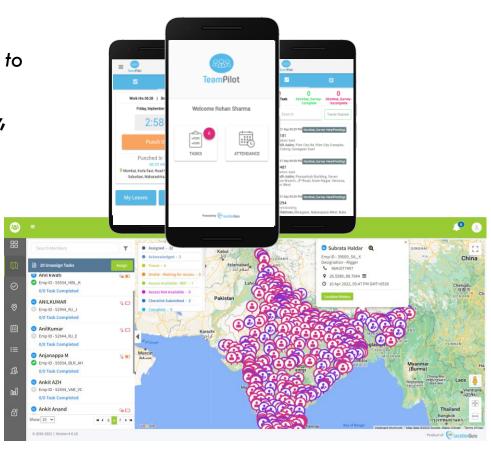




"TeamPilot is a Field service
Management solution for Enterprises to
effectively manage its field service
operation and team to improve visibility,
efficiency and productivity"

### TeamPilot helps organizations to

- Improve Visibility with Location Tracking
- Travel Claims Review with Location Tracking
- Optimize Resource Utilization
- Improve service fulfillment
- Achieve transparency in field operations
- Digitize Working Process



## **TeamPilot Ecosystem**

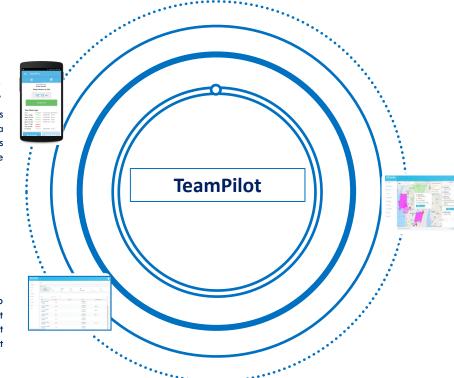




Push Tasks Capture Field Data Submit Updates Attendance

## Portal Administrator(s)

Organization Setup Site/ Resources /Asset Management User Management



Portal Manager

#### Management

Plan Tasks Manage and Monitor Field Reports and Analytics

## **TeamPilot Key Features**









**Geo-tagged Mobile Checklists** with Pictures, Signature etc.



**Travel Claims and Approval** 



Intelligent Task assignment and execution



Field Attendance & Deviations



Mobile app for Field Team Creating Own Tasks and Field Updates With

## **TeamPilot Key Features**









& KPIs







**Inventory Management** 

#### **Solution Workflow**





Tasks are created by Managers or third party ticketing system and assigned to Field Team. Tasks can be auto / manually assigned.



Field Team member punch in for the day and receive tasks on mobile app. Location Tracking starts in background.



While in travel, TeamPilot shows Field

Team members location on map and returns real-time field updates on task status.



Field updates includes status such arrival to location, completion and details such as readings, pictures service feedback on task fulfillment.



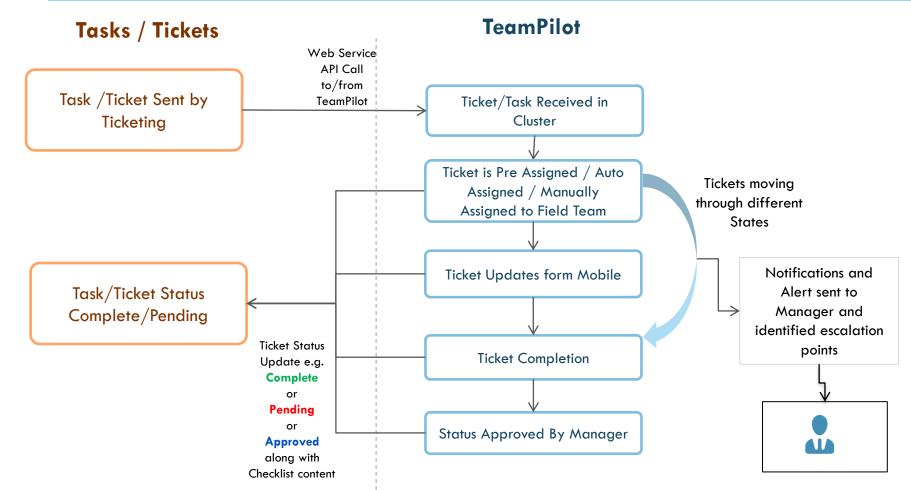
With visibility of and location history and service data collection, travel claims, and reimbursements are effortless.



TeamPilot ensures improved operational efficiency and lower operational costs

## Task/Tickets Flow When Used with Ticketing System

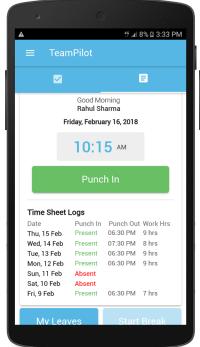


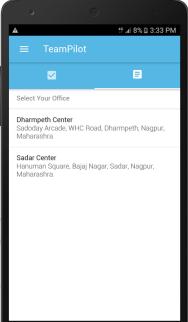


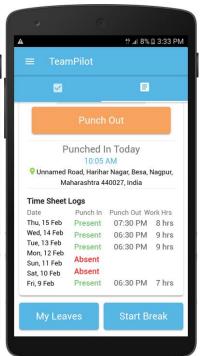
## Key Capabilities

## **Attendance - Mobile Application**









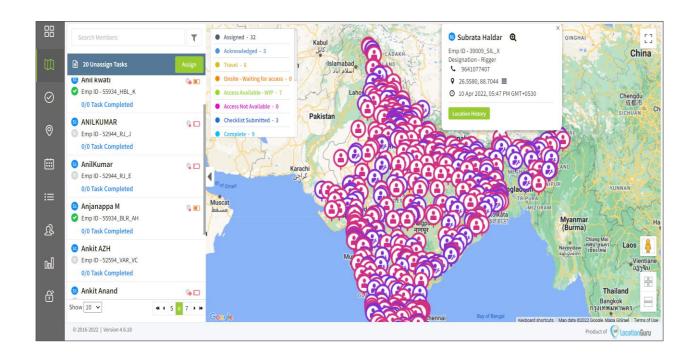
#### **Features**

- Field Team can punch in from the field or from an office
- Punch In and Punch Out captures time and location
- Select a office if you are within the office to mark your punch in as working from office.
- Fault tolerant operation network fluctuations in the field.

- Easy to use attendance for field team.
- Improved visibility for manager as to team available for work
- Improve attendance discipline.

## **Location Tracking**





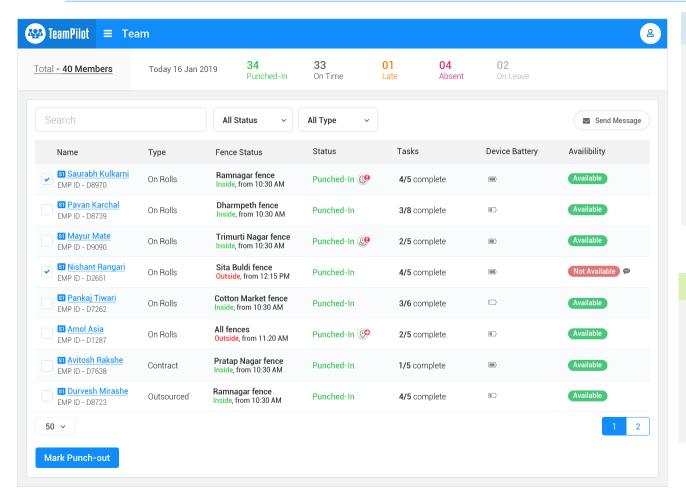
#### **Features**

- Real Time, High accuracy, background mode location tracking of Field Team with Mobile App
- Tracking starts with attendance or as per schedule.
- Tolerance for network fluctuations in field. Tracking continues when data network is unavailable and captured locations are sent to server as data network becomes available
- Search and filter by multiple fields (name, dept, mobile no etc.)
- Managers can only track their respective teams.

- Improve visibility: Single view of entire team location on map
- Location visibility leads to ability to react to situations where field team is not reaching as planned

#### **Field Team Attendance**





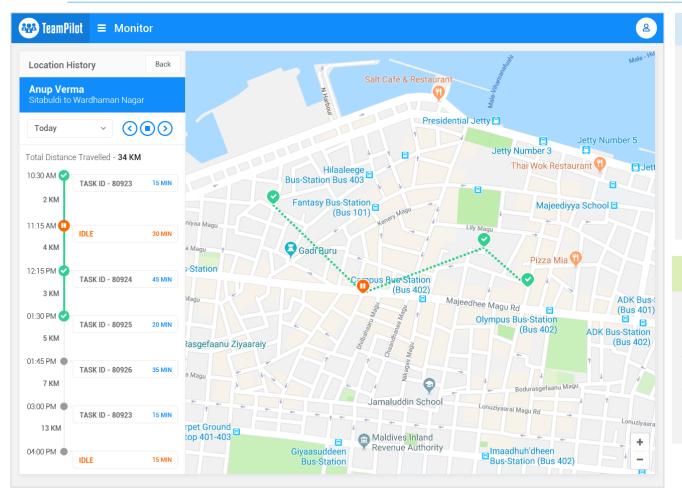
#### **Features**

- Field Team marks attendance (Punch in) from the field
- Punch In captures time and location of punch-in
- Measure punch in discipline for time and intended location

- Single view of who is in who is not, who is late to manage the day.
- Improve punctuality.
- Improve hours utilization.

## **Location History and Playback**





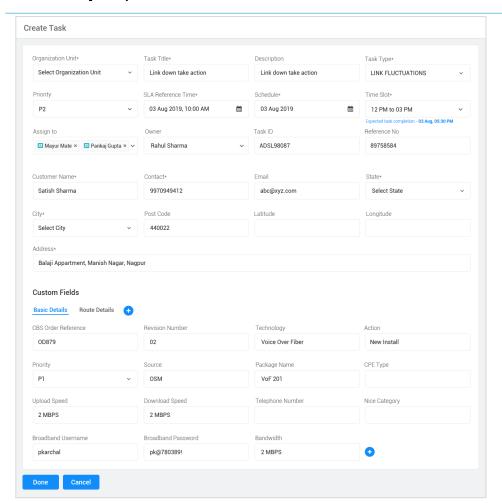
#### **Features**

- Location history and movement as a playback with respect to time
- Movement shows travel, stops with durations, tasks and distances.
- Pause and Continue to play at any time.
- View exact path taken by team in the field when moving between multiple tasks

- Improve traceability: View how the team member went through the required travel path of the day across tasks
- Transparency in Trave Claims Verification: Verify travel distance claim with actual location movement and distances.

## Manual job / Task creation





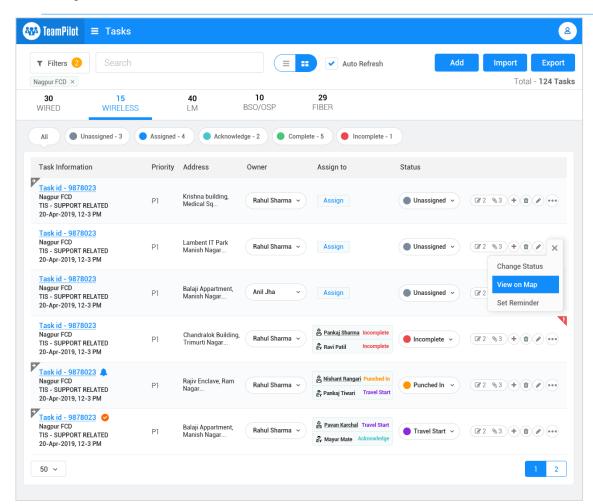
#### **Features**

- Tasks are created Manually orfrom Ticketing / ERP and sent to TeamPilot
- Tasks can also be assigned in Intelligent Auto mode, or can be manually assigned in managers user interface interface.
- Tasks are automatically filtered for logged in Managers with respect to their with their responsibility geographic areas
- Search and filter by multiple fields (status, dept, mobile no etc.)

- Improve visibility: Single view of entire team location
- Ability to react to situations where field team is not reaching

## **Projects, Tasks**





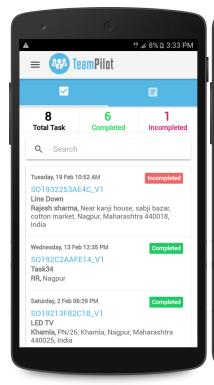
#### **Features**

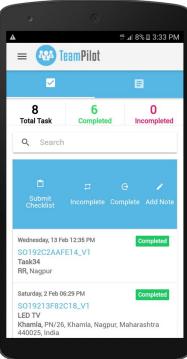
- At a glance view of Tasks with assignments, status update, with easy to use filter by task groups, status.
- Alerts for not assigned, not updated, and delayed tasks.
- Advance filter for dates, departments, person assigned amongst others

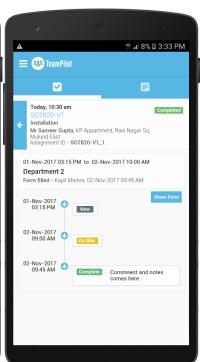
- Improve visibility: Single view of entire field activity.
- Ability to react to situations and escalation

#### **Tasks on Mobile for Field Team Members**









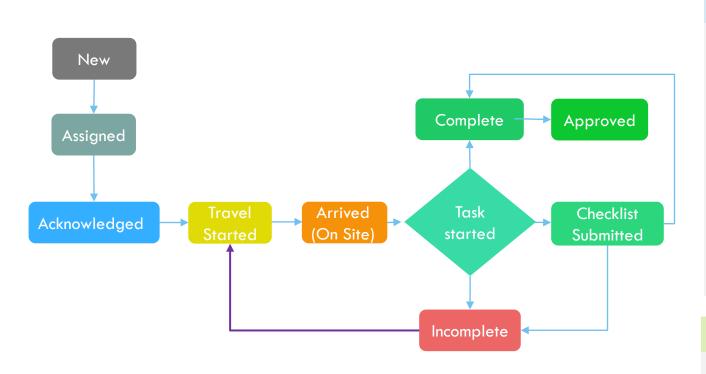
#### **Features**

- Field Team can create their own tasks with or without customer locations.
- Manager can assign tasks to field team which are sent to mobile application in real time.
- Flexible task status operations flow as per requirements of customer
- Fault tolerant task operation to withstand network fluctuations in the field.

- Receive information from the field as it happens as field team is in travel, reaches site, starts work etc.
- Improve communication with customer with respect to expected visits.
- Improve SLA performance and customer satisfaction

## **Customizable Task status life cycle flow**





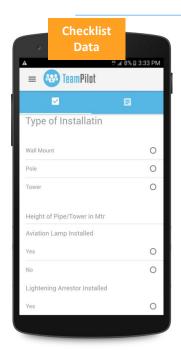
#### **Features**

- Flexible Task status flow from simple Assigned -> Complete OR task going through multiple statuses before completion
- Role wise permissions who can change status to a certain value (e.g. Complete and Approved can be only done by manager).
- Near real time update to managers.
- All updates are synced with Third party ERP / Ticketing system
- Complete history of flow

- Digitization of process to match how you work in the field.
- Complete traceability activity who did what when and where.
- Improve SLA performance and first time fix rate.

## Task Checklists, Notes and Attachment









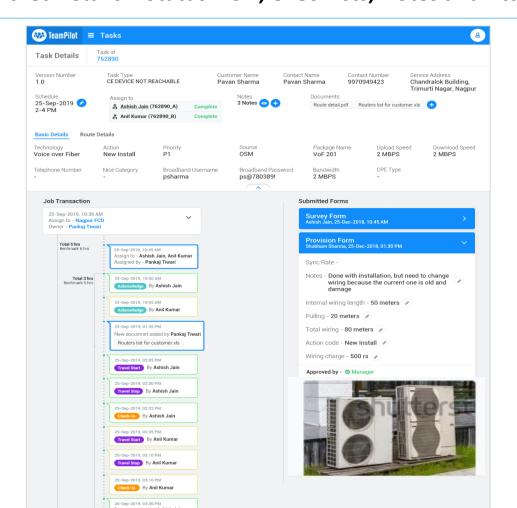
#### **Features**

- Define your own job cards / checklists as per need. Record field activity with text, dates, dropdown, reading, photos, signatures.
- Field Team records checklist for tasks assigned or self created tasks.
- Checklist covers all the relevant information about actual activity including meter readings, damage photos, spares replaced etc.
- Add notes and attachment for information outside checklist
- Opportunity for Backoffice manager to review and approve the work done before field team leaves the work site.

- Digitization of process to match how you work in the field.
- Improve root cause analysis and first time fix rate with digitization.

## Ticket Details – Status Flow, Checklists, Notes and Attachment.





#### **Features**

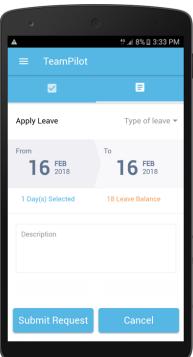
- Detail of checklists, notes, attachments and lifecycle flow of task status.
- Review checklist recorded by Field
   Team pre-assigned or self created tasks.
- Manager can add notes and attachment for the tasks
- Backoffice manager to review and approve the work done before field team leaves the work site.

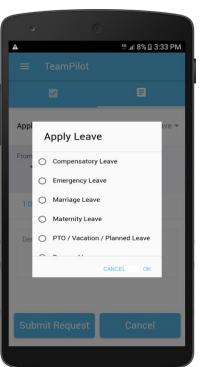
- Single point visibility of all the tasks lifecycle, checklists, pictures, notes and attachment
- Improve root cause analysis and first time fix rate with digitization.

## **Field Team Leaves and Approval**









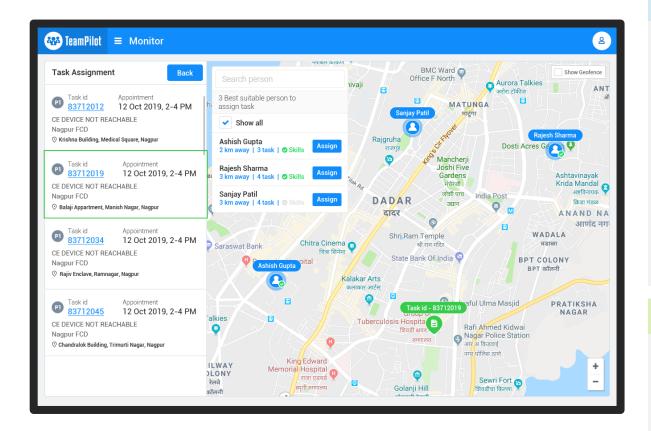
#### **Features**

- Field Team can apply leaves from the field without having to come to office
- Manager can approve the reject applied leaves.
- Track Leaves used, balance approval and rejection
- Visibility control of Field Team on leave. Location Tracking is enabled for field team member on leave.

- Know your available workforce
- Location privacy for field team on leave.
- Managers can plan alternatives for task assignment for Team members on leave.

## Task/Ticket Assignment - Intelligent Auto Mode, Manual





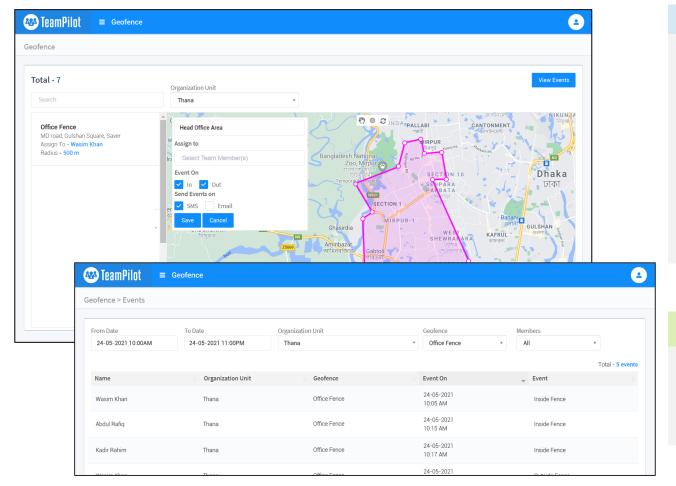
#### **Features**

- TeamPilot can be set to Intelligent
  Auto Task assignment mode where
  Aptech Tasks are assigned to Field Team
  with a Intelligent Optimization
  Algorithm
- Tasks are assigned basis availability (attendance), location proximity to work location, matching skillset, workload of field team member
- Intelligent priority reordering for higher priority tasks.
- Backoffice manager can do manual assignment or override auto assignment

- Automation of assignment decreases TAT as Tasks are not stuck for waiting for assignment .
- Improves utilization for back office Managers as most of assignment workload is handled by system

## **Work area Monitoring with Geofence**





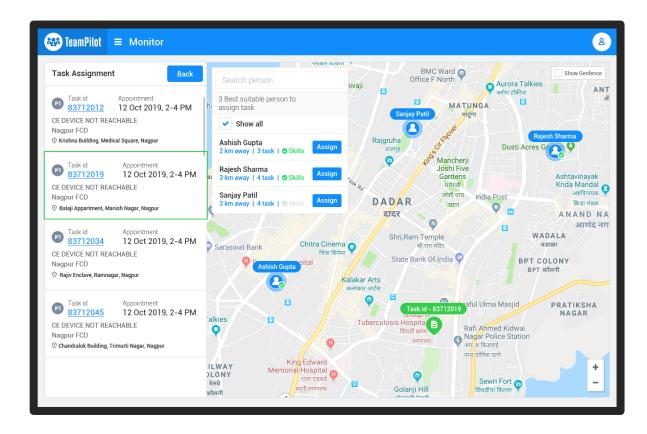
#### **Features**

- Define Work areas as geographical boundary (circle or polygon) for Field Team and monitor their presence in the work area.
- Get alert for area violations on SMS / email as field team members move out of assigned work area in work hours
- · Approve authorized area violations.
- Get detailed presence reports for field team members for their presence in assigned area.

- Visibility of area violations and travel time for tasks as they are assigned.
- Improves TAT of tasks as field team members discipline of working in assigned area increases

## **Intelligent Auto, Manual Task/Ticket Assignment**





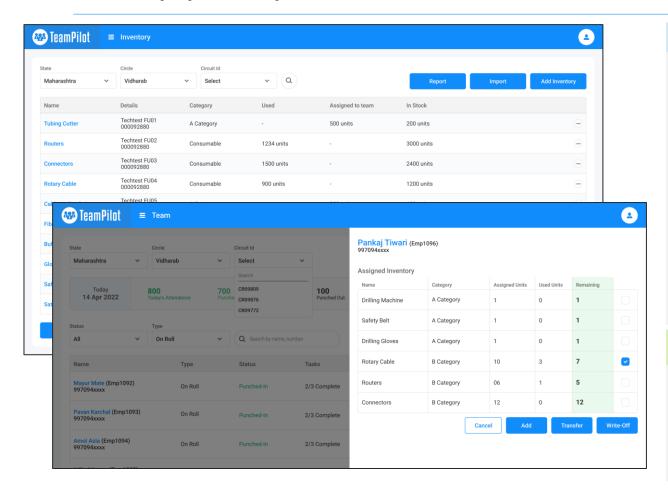
#### **Features**

- TeamPilot can be set to Intelligent Auto Task assignment mode where Tasks are assigned to Field Team with a Intelligent Assignment Optimization Algorithm
- Intelligent Assignments are done basis availability (attendance), location proximity to task location, matching skillset, workload of field team member
- Intelligent priority reordering for higher priority tasks.
- Backoffice manager can override auto assignment and do manual map view assisted assignment.

- Automation of assignment decreases TAT as Tasks are not stuck for waiting for assignment.
- Improves utilization for back office Managers as most of assignment workload is handled by system

## **Inventory System: Spares and Tools**





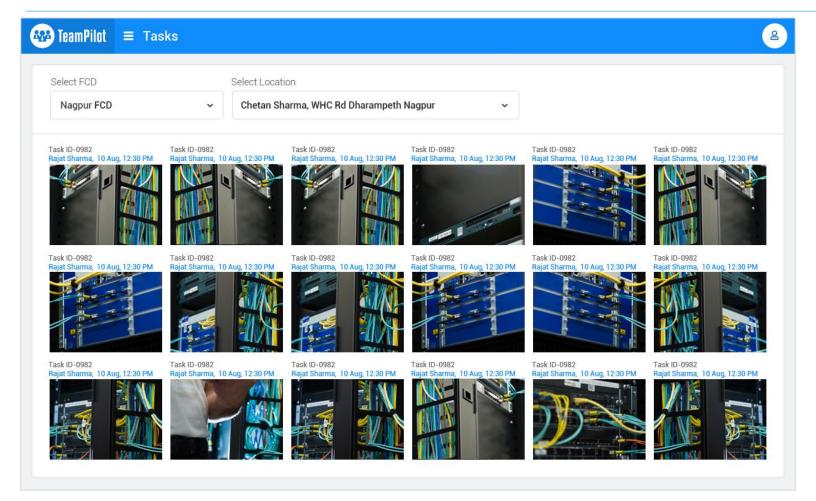
#### **Features**

- Assign and track inventory of spares, consumables and tools
- Consumables and Spares assigned to Field Team are recorded in tasks / tickets as the spares / consumables used.
- Track spares used by ticket / customers / geography.
- Track tools and assets assigned to Field Team member.
- Integration with third party inventory system if available (e.g. Inventory module in an ERP)

- Complete traceability of spares and consumables used in tasks / tickets.
- Complete traceability of tools and assets to Field Team.
- Reduction in voluntary / involuntary loss of spares and tools.

## Uploaded photos through task forms

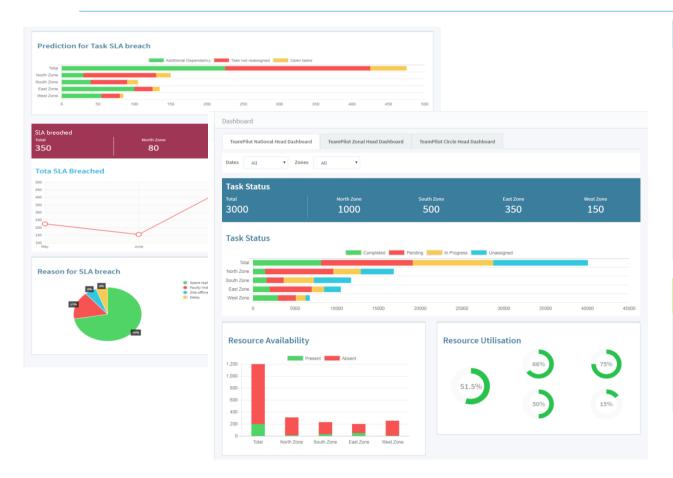




## Reports

## Team Productivity, Utilization and Ticket KPI Measurement





#### **Features**

- Measure productivity and utilization Metrics for Field Team basis attendance, tasks attended, time in travel, task service time etc.
- Measure Task KPI such as Turn around Time, First time fix rate along with reason metrics for failures
- Metrics presented as Intuitive Graphical dashboard.

- Measurement is key to improvement. Improve Team Performance, Utilization, Task KPI for the organization
- Improvement in task KPI improves customer satisfaction scores.

## **Team Member Report**





## **Task Status Report**

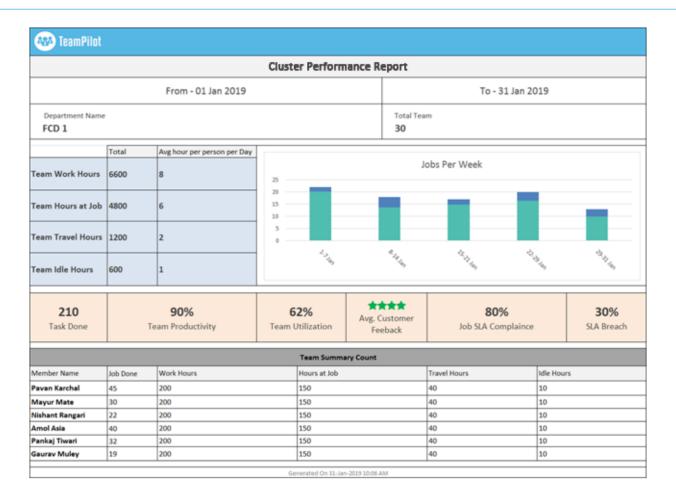


This report should be downloaded with all TASK status, not only completed TASK but incomplete task also

TeamPilot TeamPilot										
Task Status Report - All Tasks										
From - 01 Jan 2019					To - 31 Jan 2019					
<b>90%</b> Tasks Complete	<b>6 hrs</b> Avg. TAT		<b>20%</b> Resolved in 30 minuts		Avg. Customer Feeback		80% omplaince		<b>20%</b> Avg. SLA Time	
Task Info	Customer	Schedule Time		Assign to	TAT	Arrival	SLA Breach	Feedback	Status	
ID9087 LEAD	Pavan Sharma	01-Jan-2019, 10:30 AM		Mayur Mate	3 hrs	On time	0%	Excellent Experience	Complete 01-Jan-2019, 01:30 AM	
D8793 PREMIUM COLLECTION	Mahesh Verma	01-Jan-2019, 10:30 AM		Nishant Rangari	2 hrs	20 min delay	0%	Excellent Experience	Complete 01-Jan-2019, 12:30 PM	
D8983 LEAD	Gopal Joshi	01-Jan-2019, 10:30 AM		Pankaj Tiwari	30 min	On time	20%	Excellent Experience	Complete 01-Jan-2019, 11:00 AM	
ID8792 LEAD	Tapan Jha	01-Jan-2019, 10:30 A	M	Ravi Patil	3 hrs	On time	0%	Excellent Experience	Complete 01-Jan-2019, 01:30 PM	
ID9082 LEAD	Sapan Verma	01-Jan-2019, 10:30 A	M	Sameer Gupta	4 hrs	On time	0%	Excellent Experience	Complete 01-Jan-2019, 02:30 PM	
				G	enerated On 31-Jan-2019 10:06 AM					

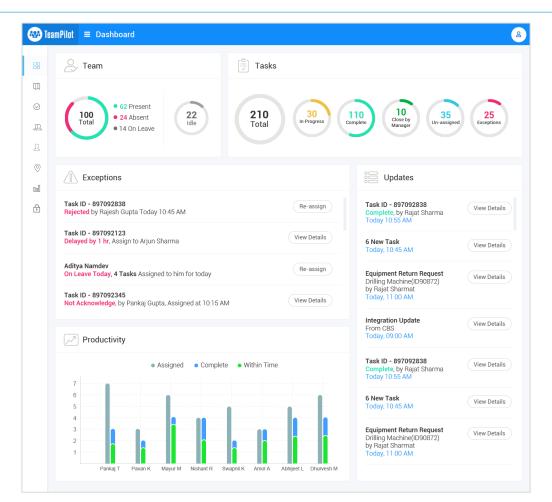
## **FCD Performance Summary Report**





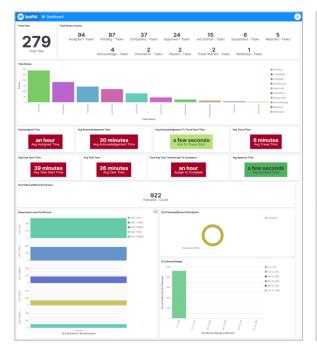
## **Managers Dashboard**

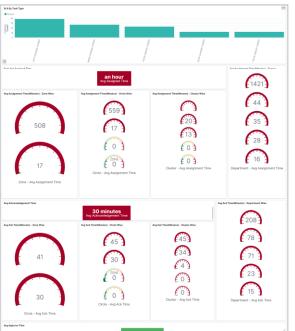




### Task Dashboard









## Thank You

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