



Mobile Workers are First-line Workers

Make sure they are well equipped to serve your customers

Make your mobile workers more successful with Microsoft 365

Most larger companies have an increasing number of Mobile Workers. Mobile Workers spend most of their time on the road and at the customer's site. They come to the office only when that is really needed.

With current technology, you can empower your Mobile Workers, make them more efficient in what they do, and increase their service level to the Customer. Mobile Workers typically work alone most of the time. But sometimes they have to get in touch with colleagues to complete their job.

Typical challenges for mobile workers are:

- + *Planning/Re-planning*
- + *Remote access to the right information (without exactly knowing where it is)*
- + *Communication (audio and video) with back office workers and specialists in and outside of the company*
- + *Simple access/integration with Line-of-Business applications like ERP and CRM (for customer information, equipment or product data, work order details, etc.)*



“You already pay for the licenses. Now start using them to the full.”

You probably know Office 365 or Microsoft 365: you know the standard 365 functionalities like mail, calendar, document sites, etc. But Office 365 and Microsoft 365 offer a lot more to support your Mobile Workers. It is there for you to use. You already pay for the licenses. **And Spikes can help you to make more and better use of it and to empower your Mobile Workers.** All of this is part of the First-line Workers offering of Spikes.

4 Types of Mobile Workers

The Spikes First-line Workers offering is designed for each of the **following types of users:**



Sales representatives

- are the archetypes of Mobile Workers: they spend most of their time on the road, visiting customers, working outside the walls of their office. In order to perform well, they need the right tools to guide them through the day



Field Service Engineers

- work almost all of the time at the customer's site. They also work alone most of the time. Until they need support from a colleague or the office.



Project Workers

- work at the project site. And although that is often not an office environment, they still access to the right Office Tools to perform well.



Inspection Workers

- can do their only on the road. They travel from site to site to do their work. But they need to stay in touch with their back-office and colleagues and they need the right tools to make that possible.



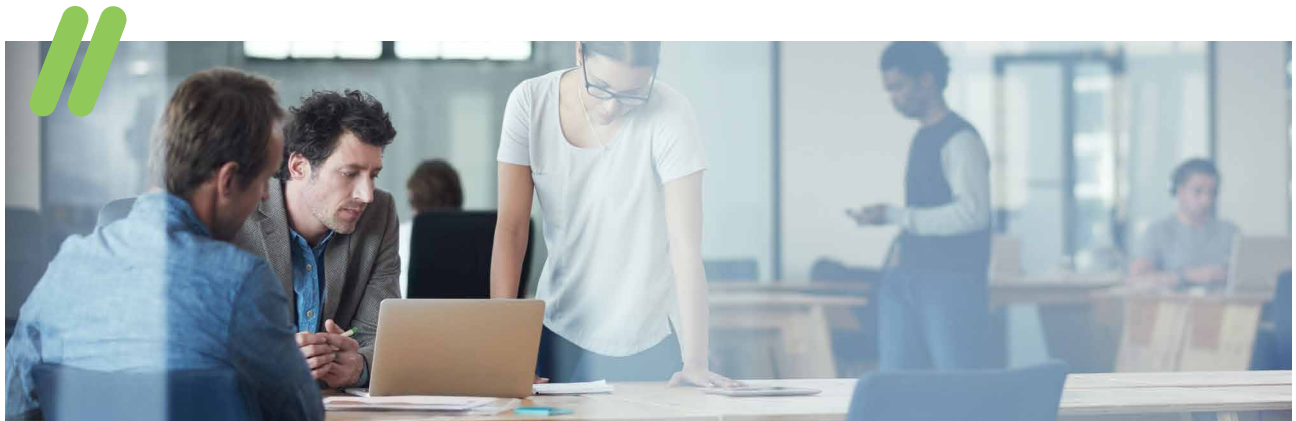
Security First

All business data is sensitive data. It goes without saying that it is critical that business information is protected against unauthorized or unintentional use. This is also true for devices and applications. You cannot empower your Mobile Workers as long as you have potential security issues.

Therefore, an important part of the Spikes offering for Mobile Workers is security: to protect users, business data and in the correct way. So that when a device gets lost, no individual can get unauthorized access to whatever confidential data that is on the lost device.

Microsoft 365

All of the above can be designed and implemented by using standard building blocks and standard functionality of Microsoft 365, which most likely is already in use within your company. It is just a matter of configuring the right functionality and optimizing the way in which your Mobile Workers operate.



A Day in the Life of a Mobile Worker

Let us take you through a ***“Day in the life of a Mobile Worker”***. You will recognize the activities and also the questions/problems your Mobile Workers run into on a daily basis:

Start of the day`

1. In most cases your Mobile Workers start from home and never come into the office before they start their round
2. Before they leave, they want to make sure they have all the information they need for every visit to perform the planned activities
 - If yes, they can start, if not they need easy access to all pieces of information that are critical for them to perform their job.
 - The information they need is probably stored in many places (or applications) and must be remotely accessible, even without exactly knowing where the information is stored. Think about previous visit reports, pre-defined activities that need to be executed, safety regulations that are critical to follow, pre-defined processes to follow for the job execution. For the Mobile Worker it should be easy to search for this necessary information, in case it is not prepared and made available in advance.

Execution on site

1. In most cases the Mobile Worker is able to do his/her job independently from anybody else. But in a number of cases it is not unlikely that help and assistance is needed on the spot.
 - In case help is needed, and additional information is required, the search for that information must be very easy for the mobile worker, based on parameters related to the job at hand: location, customer or equipment information, history, etc. The supporting system detects where that information is stored, even across applications.
 - In case more help is needed in the form of hand-on help or the advice of an expert, that person must only be “a click away”. If it is not clear who is the best expert and if he/she is available, the system will be able to help locate the right expert at that time. This expert can be somebody inside or outside the company.
 - In case it is important to make the situation on site very clear, Augmented Reality and sharing of video and photos is available. In that way real-time collaboration leads to a quicker resolution of the problem on site

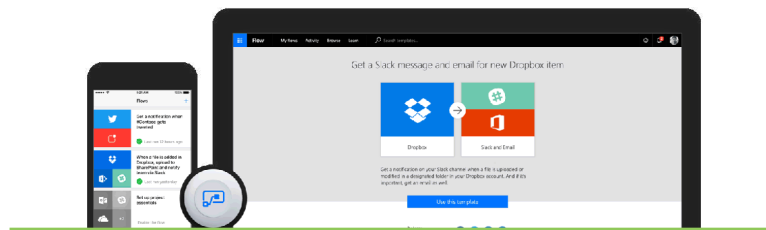


Wrapping up the visit/execution

1. When the visit/execution is completed, the fieldworker travels to his/her next appointment
2. In case the execution is not completed and another visit is required, the Mobile Worker needs to be able to re-plan immediately a next visit (having full access to the calendar of the person that needs to come on site), or
3. Order materials/supplies via a simple workflow and re-plan the visit, based on pre-defined delivery dates
4. Also a visit report needs to be completed, describing the executed activities, including time stamps.

Emergency

1. When an emergency visit comes up, disturbing the current planning, all the following visits must be re-planned automatically, and the customers will be informed of the change of plans.



You already have the Tools

The building blocks within Microsoft 365 that support the above mentioned activities are a.o.:

- ✓ **"Planner"** for the planning of the activities
- ✓ **"SharePoint"** for the Knowledge portal (With "Autotagging" of documents to facilitate easy search)
- ✓ **"Interactive Chatbots"** to help the fieldworker navigate to the right documentation
- ✓ **"Teams"** for the collaboration on site and also for all communication on site (written or voice)
- ✓ **"Flow"** to create a workflow for ordering materials
- ✓ **"Power apps"** for visit reporting and closure of a visit
- ✓ **"Enterprise Mobility Suite"** to keep your data and mobile devices safe

How will we help you

XXXXXXXXXXXXX To be completed: how will Spikes conduct a First-line Workers project XXXXXXXXXXXXXXXXX

Who is Spikes

If some of the above-mentioned problems are part of your daily life, the Spikes First-line Worker Offering might be a good place to start for putting solutions in place. **We are experts in Digital collaboration, focussing on Microsoft 365 to help our customers become more efficient, have more engaged employees and become more customer oriented.**



Contact

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Hopefully this whitepaper provided you with some inspiration and insights to prepare your organization for the various automation tools and possibilities? If you would you like to challenge your ideas, if you have specific questions or issues? Do not hesitate to contact me and we will look at the possibilities together:

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