

# Predictive



## Customer Appointment Management™ (CAM)

Next Generation Strategies for Managing the Mobile Workforce and Enhancing the Customer Experience

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**A Business White Paper**

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## A Business White Paper

## Executive Summary

Mobile Workforce Management is undergoing a disruptive transformation, driven by heightened expectations of customers for enhanced, real-time delivery of goods and services. Companies, ranging from cable and telecommunications operators to leading retailers and other home services companies can no longer rely on outmoded ways of interacting and communicating with customers to manage appointments. Nor can they continue a “silo” approach to mobile workforce management that focuses on optimizing the work flow and work order process, while not taking into account the integral customer interactions that drive intelligence dispatching, routing and scheduling. In order to achieve a higher level of optimization for their mobile employees, as well as improved customer satisfaction, companies are embracing more holistic technologies that unify the workflow and customer appointment processes.

## The Demanding, On-Demand Customer

Companies may call it a “window”, but consumers have other names like “prison sentence” or “being trapped” or just plain “annoying”. It’s that maddeningly imprecise time span in which a service technician, installer or package may or may not arrive at your home. And it’s a time frame that customers are increasingly unwilling to put up with, according to recent research findings. The situation is just as frustrating for companies, who lose both customer goodwill and relinquish efficiencies and incur non-value operational costs when service personnel fail to connect and when customers call to ask where and why.

More than 68% of consumers polled say long waits and uncertainty about when and whether a field service representative will show up are their biggest frustrations with service and delivery appointments. Nearly half of respondents say they have either waited longer than 2 hours or have experienced a “no show.” More than 27 percent say that shortening wait times to one hour or less would save them more than \$400 in wages or income for each appointment.

More than ever, customers are expecting enhanced on-demand customer service at the point of delivery. Increasing competition in industries like cable and telecommunications means customers are often in the drivers’ seat rather than the service provider. Customers who have a poor experience regarding the initial installation or delivery are more likely to switch to a competitive provider and more likely to have continued low customers satisfaction ratings.

## Mobile Workforce Management Revisited

TOA Technologies is taking the lead in defining a new approach to mobile workforce management called Customer Appointment Management™, or CAM™. Rather than simply delivering work orders to field employees, CAM optimizes the mobile workforce with a focus on the most critical touch point - the customer appointment event. CAM is a holistic approach for delivering goods and services to customers that optimizes mobile workforce operations, utilizing mobile technology, predictive computing, and automated interactive customer communications.

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### The Four Pillars of CAM

There are four essential aspects of CAM:

#### 1. Customer Preference

CAM enables appointments to be driven by customer preference, not by service provider dictates. CAM embraces customer preference as an integral part of a holistic approach to service delivery.

#### 2. Predictive Intelligence

CAM accurately analyzes every aspect of the service delivery process. It's a system that constantly learns from the data it analyzes. The result is a dramatic improvement in operational efficiencies and a substantial reduction in the customer's "wait window".

#### 3. Continuous Feedback

CAM provides interactive and automated ways for customers to continuously receive real-time information regarding appointment status, updates and delays. Customers can painlessly cancel, reschedule and confirm appointments, as well as provide valuable feedback through fully integrated, flexible and configurable automated post-appointment surveys.

#### 4. Always On Demand

CAM gives operational managers, dispatchers and customers real-time, actionable and interactive knowledge in order to deliver the ultimate customer experience. It is predicated on the notion that a superior customer appointment experience depends on responding to customer needs and managing the mobile workforce with a real-time, on demand approach. post-appointment surveys.

### Key Business Drivers

When deploying a mobile workforce management solution, companies who employ mobile field personnel to deliver goods and services directly to customers have two over-arching business objectives. One is to increase efficiency and reduce cost by optimizing the workflow between the field and dispatchers. This involves reducing wasted truck rolls to customers who are not at home, as well as unnecessary calls into the call center by customers asking “where is my service technician?” The second business objective is to improve customer satisfaction by leveraging the appointment as a relationship-building opportunity. For many mobile workforce management solutions, these are separate initiatives, both in terms of business process and technology. However, with TOA’s approach to mobile workforce management, these dual business objectives can be addressed within one modular platform.

In order to achieve the twofold objectives of streamlined optimization and improved customer satisfaction, companies are finding the following business requirements essential in a mobile workforce management solution:

- The ability to address both contract and non-contract mobile employees
- Rapid implementation
- Easy to use with minimal training and maintenance
- Flexible pricing that can be paid for with the operating budget
- Continuous software updates deployed instantly

### TOA’s Solution

TOA’s CAM approach comes to life in its ETAdirect Solution Suite – the only solution that provides enhanced mobile workforce management by addressing both advanced automation and integrated interactive customer communications in one holistic, completely Web-based application. Some of ETAdirect’s key differentiators include:

- **Customer Focused:**  
Built from the ground up to be focused on solving the most critical customer service issue - the unpredictable “wait window”
- **Predictive:**  
Combines historic performance patterns with customer preference to accurately predict optimal scheduling, routing and dispatch. ETAdirect employs a unique algorithmic approach to provide maximum functionality and flexibility with significant, proven, benefits.
- **Self Learning:**  
ETAdirect is constantly updating the system’s intelligence based on historical patterns of mobile employees in the field combined with their interactive communications with customers.

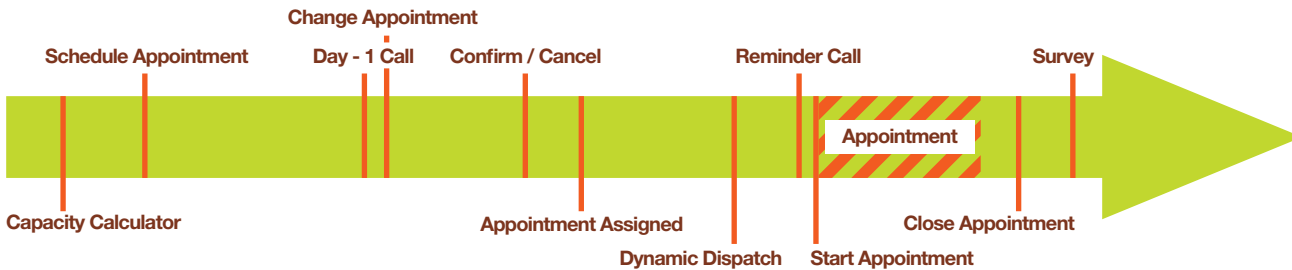
• **Configurable:**

ETAdirect is highly configurable, easy to use, fast to train, and simple to maintain. The system has proven its ability to scale to support tens of thousands of users, and has excellent reliability and availability record.

• **Web Based:**

Built as a Software-as-a-Service (SaaS), ETAdirect is the only completely Web-based Mobile Workforce Management solution on the market. The ETAdirect software is accessible via any standard browser, and does not require installation or download of any executables or plug-ins.

The high level timeline below illustrates the holistic approach that ETAdirect employs in regard to managing the customer appointment, beginning with capacity management, scheduling and routing and moving on to varied customer communications, appointment confirmation, dynamic dispatch, appointment management and post-appointment surveys. While the foundation of ETAdirect is enhancing and better managing the customer appointment event, the solution includes a comprehensive set of modules for mobile workforce management.



## Software as a Service (SaaS)

TOA is the first company to offer a complete Mobile Workforce Management solution via the Web. ETAdirect is offered as Software-as-a-Service (SaaS), and is fully Web Services enabled. ETAdirect can be accessed from any Internet-enabled device, and has a zero footprint on the devices used. This approach facilitates clients' purchasing decisions, and greatly reduces maintenance costs. The Web-based approach also enables TOA to uniquely offer a complete solution to sub-contractors, who account for 50-100% of the mobile workforce among TOA's customers. Sub-contractors work on narrow margins, and cannot afford investment in expensive upfront license and hardware payments. The Web-based SaaS model enables subcontractors to benefit from top-of-the-line technology that dramatically improves their bottom line with ease.

## ETAdirect Overview

ETAdirect is designed to be modular, so clients can deploy components of the solution that best matches their business objectives.

### **Planning and Scheduling Modules:**

#### **ETAdirect Dynamic Routing & Scheduling Optimization**

- Completely configurable for multiple organizational levels
- Fully integrated with customer communications
- Effectively minimizes travel time, work time and overtime while reducing service window violations
- Efficiently matches mobile employee with the most appropriate jobs

#### **ETAdirect Capacity & Availability Planning:**

- Includes Predictive Capacity Estimation based on historical performance and work patterns
- Utilizes a range of data from geographic location to appointment time windows to mobile employee skills
- Effectively minimizes travel time, work time and overtime while reducing service window violations
- Easily integrates with customer care systems via Web services

### **Mobile Workforce Management and Reporting Modules:**

#### **ETAdirect Manage - Dispatch & Monitoring**

- A complete application for dispatch and field management
- Supports installation, delivery, service/repair, maintenance and contractors
- Access and view at multiple organization levels (mobile employee, dispatch center, region, company)
- Interactive Route Maps - fully integrated with Google™ Maps
- Full integration with Customer Care and Billing systems
- Works with all major mobile devices and carriers

### **Interactive Customer Communications Modules**

#### **ETAdirect Notify**

- Interactive estimated time of arrival notifications delivered according to customer preference
- Automatic personalized messages can be sent to customers via voice, text, and email
- Completely configurable rules based on client objectives
- Easily integrates into client websites for online customer access
- Full integration with Customer Care and Billing systems
- Integrated access for Customer Service with ability to redirect “where’s my tech” call

### **ETAdirect What Customers Think™ Post-Appointment Survey**

- Automated, interactive post-appointment survey captures real-time customer satisfaction
- All surveys are configurable
- Immediate statistics and analysis of customers delivered across the organization – not a random sample.

## Interactive Customer Communications (PCC)

**ETAdirect Notify** and ETAdirect “**What Customers Think**”™ are the backbone of TOA’s unique approach to Customer Appointment Management.

**ETAdirect Notify** is a flexible, intelligent messaging platform that allows interactive communications with a company’s customers, mobile employees and managers to keep them up to date regarding the status of customer appointments. Notify allows customers to make changes in their appointment schedule and receive continuous, automated and personalized information throughout the appointment process.

*Notify features include:*

- Delivers personalized interactive messages automatically according to pre-defined business rules
- Retrieves feedback from customers regarding the appointment while delivering notifications
- Delivers notification via voice telephone, or in text to mobile phones, pagers and email accounts
- Lets customer retrieve appointment status information from the company’s website by embedding that information within the site
- Captures incoming customer calls to the call center and provides field service employee’s updated Estimated Time of Arrival and Status information without having to speak to a CSR
- Allows collection of preferred contact information and message delivery preferences automatically during the process
- Stores customers message delivery preferences, both mode, frequency and timing
- Allows control of message delivery rules in an easy-to-use Graphical User Interface (GUI)
- Defines voice, text and email message content in an easy-to-use Graphical User Interface (GUI)
- Supports any and multiple languages according to customers’ choice.

**“What Customers Think”**™ (WCT) is ETAdirect’s Integrated Post-Appointment Survey Module. WCT automatically surveys customers immediately after an appointment is completed to gauge their satisfaction and better understand the quality of service they received. WCT enables an unprecedented view of field service quality to provide advanced business intelligence.

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*WCT features include:*

- Automated surveys sent out to customers immediately after the completion of an appointment
- Management access to customer satisfaction and employee performance metrics online in real-time
- Deeply configurable surveys can be continuously customized for business initiatives, marketing campaigns, different regions, company subdivisions, services and languages
- Comprehensive statistical analysis of customer satisfaction delivered across the organization
- Links customer response to technician records at the group, system and company levels

## Summary of Key Benefits

Companies who have deployed ETAdirect have achieved significant gains in productivity while reducing costs and improving customer satisfaction. Some of the benefits include:

- Increased daily job completion rate
- Improved dispatcher-to field-employee ratio
- Reduced “not-at-home” wasted truck rolls
- Reduced “cancellations at the door”
- Reduced “where’s my tech” calls to the Call Center
- Provided a centralized Web-based view for monitoring field service activities
- Ensured adequate staffing and on-time arrival of field service personnel for improved customer satisfaction
- Continuously and proactively communicated with back-office, mobile employees, and customers to better manage delivery and service expectations
- Eliminated the notorious customer “wait window”

## Conclusion

TOA's breakthrough approach to mobile workforce management, called Customer Appointment Management™ (CAM), provides a holistic approach that integrates interactive customer communications with intelligent capacity planning, routing, scheduling and dispatch. TOA's solution, ETAdirect, offers the only completely Web-based service, built on the Software as a Service model, that is modular and easy to deploy and maintain. ETAdirect's Interactive Communications include Notify and “What Customers Think”™, two modules that allow customer preference to drive the mobile workflow process – a fundamental difference that separates ETAdirect from other mobile workforce management solutions.

## About TOA Technologies

TOA Technologies is the leading provider of Cloud-based mobile workforce management applications for large enterprises. Its patented platform improves customer service while dramatically reducing operational costs and providing immediate return on investment. As the industry's only solution using predictive, time-based analytics, TOA reduces customer wait times while increasing field workforce efficiency. TOA automates Time Of Arrival communications across multiple channels to proactively keep customers apprised of their appointment status. It delivers unparalleled cost savings by providing on-demand tools for real-time planning, routing, dispatching and tracking of workers in the field. TOA's system deploys quickly, is highly configurable and is easily integrated with existing CRM solutions. Named a Visionary for three years running in Gartner's annual Magic Quadrant for Field Service Management, TOA Technologies is headquartered in the United States and has offices across Europe. For additional information please visit [www.toatech.com](http://www.toatech.com).

*For more information, please contact us*

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