



Guide to Systems Optimization Through Digitization

How Equipment Rental, Sales, and Service Companies can Reduce Operational Expenses and Increase Efficiencies

Digitization is key to future growth. As your business grows, so does the need to accelerate business process improvements to streamline efficiencies. With the evolution to more remote working environments and contactless service, the value of digitization, process and data transparency, and real-time collaboration has become even more important. Many businesses now embrace these capabilities as imperative to success.

For equipment rental, sales and service companies, there are complex service and delivery aspects that can complicate the move to digital. Most work/asset management and field service solutions were built as individual systems, each with its own silo of data and little, if any, integration to billing and financial systems. These systems often require complex integrations, weeks of training, and a heavy dependency on key employees to bridge information silos.

With the rising costs of operations, equipment businesses need to find ways to better optimize their operations; they need to extend the reliability and life of rental assets as well as maintain and increase service revenue streams from equipment sales. What should equipment companies look for in their field service management, work, and asset technology solutions?

Read on for five considerations to maximize asset and field work technology investments.





1 Real-Time Digital Engagement Increases Efficiency

Think about the processes that have been transformed through digital engagement in everyday life – from ordering a ride, to tracking a package, to shopping online. As consumers, it's almost unacceptable for a business to not have a way to digitally order, track service delivery, and provide feedback.

The same engagement technologies that enable so many consumer interactions are now also expected in the equipment rental, sales, and service industry. Real-time engagement with back-office employees, field teams, subcontractors, vendors, and customers accelerate the speed of sales, service, and revenue.

Siloed data from disparate systems relies on complex integrations to synchronize data intermittently, resulting in potentially outdated information as soon as an update occurs. Your customers, employees, and contractors operate and communicate in real time – so should your systems.

Look for a modern cloud solution that combines asset management and mobile field service management. The solution should enable real-time digital data capture, exchange, and visibility of information between operations, sales, customer support, technicians, contractors, vendors, and customers.



2 Business Flow Configurability Streamlines Processes

Efficient business processes enable repeatability and ensure consistency in service delivery. Manual and paper processes and siloed systems are cumbersome and prone to error. It is imperative that the chosen technology solution has the flexibility to allow workflows to be reconfigured and aligned to your business as needed. Your business systems should support flexibility while also enabling consistency, operational excellence, and higher levels of customer service delivery.

Look for a system that allows you to dynamically create workflows not only for the needs of your business today, but also as your business grows. The most effective systems will enable users to easily create digital processes that align to industry-specific business requirements. **Look for capabilities such as business rule triggers, transactional data validations, and workflow orchestration supporting audible or visible alerts and 'to do' lists.**

3 Embedded Integration Engine Elevates Operations with Connections to Back Office

Many businesses today have digitized various aspects of their operations with best of breed solutions such as ERP, CRM, inventory management, procurement, and sensor-based IoT. Integrating these systems into your work and asset management platform gives you visibility into the demand for human resources, equipment, and materials across your enterprise.

Be sure any solution considered has an integration engine designed on no-code/low-code data architecture. This combination will enable “speed-to-value” with complete end-to-end processing integration at an accelerated pace.

4 Mobile-First Native Software Ensures Easy Field Worker Adoption

Gone are the days of huddling your workforce in a training room and handing them a complex user manual to introduce new software. Now, with a distributed workforce, adoption and compliance are heavily reliant on intuitive design, reliability, and ease of use.

In the case of mobile apps, looks can be deceiving, so be sure to understand what's under the hood when evaluating solutions. Some vendors offer an alternative to a native mobile app as a web application – which appears to be a mobile app, but in reality, is just HTML. While web apps are cheaper to develop, they have drawbacks that can hamper productivity such as the inability to operate offline and access inherent device functions, and can't be easily configured to specific roles.

Native mobile apps, on the other hand, are developed using a platform's core programming language, making them intuitive and easy to use, and configured for each role to make everyone's job easier. They're also stored on the mobile device itself. As such, they're more efficient on their respective platforms and take full advantage of the device's processing speed.

Native mobile applications also integrate seamlessly with the device hardware, readily accessing capabilities such as GPS, camera, phone, touchscreen, etc. Accessing these same capabilities from a web browser can be problematic, limiting the capabilities of the application.

For equipment businesses, an important consideration is whether the application can operate offline. Web applications require internet connection to access page content. Native mobile apps reside on the device, and can be accessed and utilized whether working in an office or delivering or providing service to equipment in a remote area.

5 Industry Best Practices Enable Faster Implementation

Fitting a square peg into a round hole characterizes the feeling of many software implementations. Once the contract is signed and the project moves into execution, the magnitude of internal and external resources required for implementation comes into focus. Industry implementation timeframes of twelve months or more are not unusual. How can you avoid going over time and over budget?

Look for a solution that can address your industry-specific nuances with pre-configured best practices. Otherwise, you risk high levels of customization that are costly and difficult to maintain. Research the implementation methodology and understand what resources will be required from your business. A successful implementation is a two-way street and will need, at the right points of the project, key business users involved to validate the workflows.

The best provider will offer an implementation with built-in change control mechanisms. To minimize barriers to adoption, always involve your end users early in the process during business requirement confirmation, conference room pilots, and user acceptance testing. This gives them ownership and a say in the success of the project. You and your team have a business to run—software implementation should not become a drag on your core business.



Conclusion

The impact of COVID-19 has intensified the need to streamline business process and reduce operational costs – and will continue to have ripple effects. The same flexibility, process transparency, and collaboration that allowed businesses to adapt in times of uncertainty will allow them to flourish in stable market conditions. Companies must access all the information trapped in siloed systems and connect the ecosystem of their employees, sub-contractors, assets, and customers to compete effectively and grow. Selecting the right technology to harness the power and intelligence that has been stifled by siloed systems and manual processes is fundamental to success.

As you evaluate systems, be sure your checklist includes:

- ✓ Real-time collaboration across back-office and field employees, subcontractors, vendors, and customers
- ✓ Workflow flexibility and configurability
- ✓ Easy integration with established systems
- ✓ A native mobile application
- ✓ Built-in industry best practices

About KloudGin

KloudGin is a trusted provider of the only combined, one-cloud, industry-focused mobile field service, work, and asset management solution that connects customers, employees, and assets using AI-powered access to information, on any device. Built for the workers who use it most, KloudGin eliminates traditional information and process silos to enable clients to unify siloed systems, resources, and processes so they can transform the customer experience and improve worker productivity to effectively meet the challenges of today—and the demands of tomorrow.

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