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IN MY OPINION

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The Birth of a New Standard

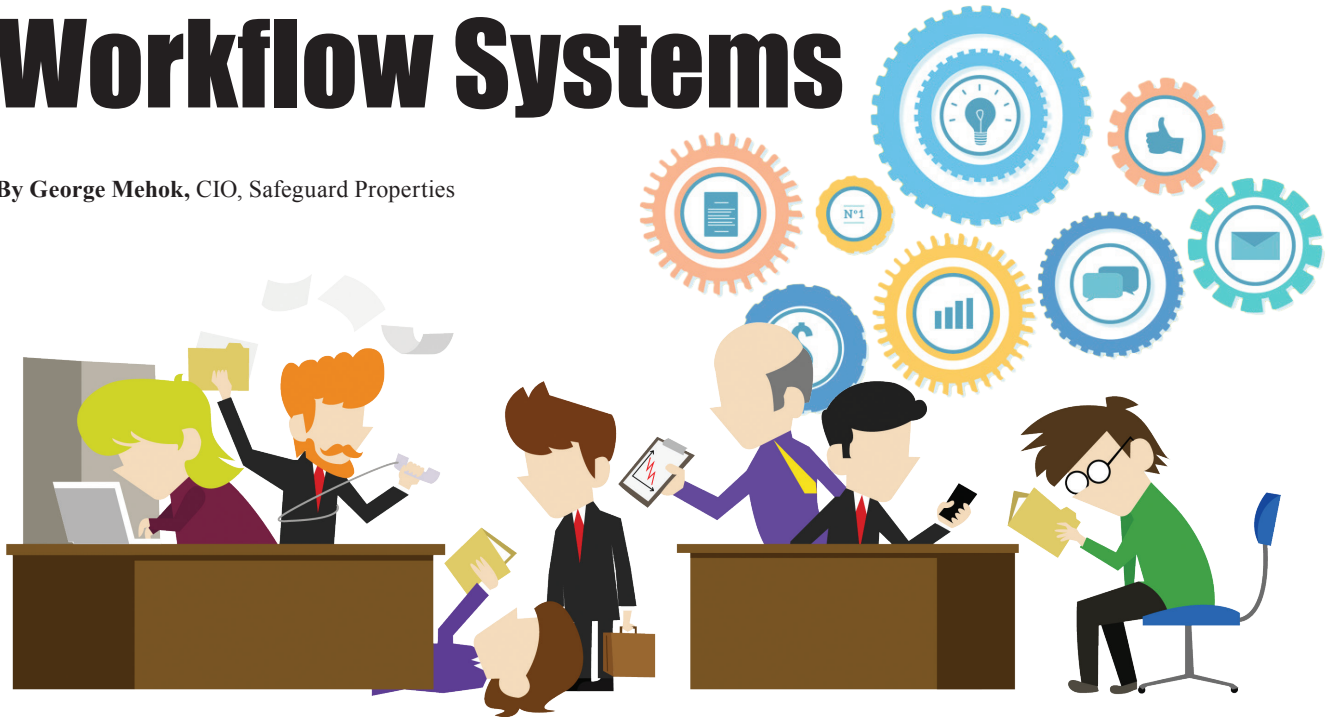
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Next Generation Automated Workflow Systems

By George Mehok, CIO, Safeguard Properties



Balance between Operational Performance and Service Quality:

The mortgage field services industry faced a monumental challenge when the most recent recession impacted millions of Americans and every community in the U.S. Mortgage lenders, also known as servicers, hire property preservation firms to inspect and maintain those properties on their behalf during the delinquency process, which can take months, even years, in some areas of the country.

Field service companies like Safeguard Properties, the largest national property preservation company in the U.S., inspects and maintains millions of residential properties across the country utilizing a national network of thousands of inspectors and maintenance contractors.

Those inspectors and contractors receive work and report their findings back to Safeguard by following a script

of questions, while utilizing a mobile device and a field service mobile app. Corresponding photos are required to paint a clear picture of the property for Safeguard and its mortgage servicing clients. Those scripts and photos result in millions of data points for Safeguard to manage by importing it from inspectors and contractors and exporting it to servicing clients. How does Safeguard, and other field services companies, manage the continuous flow of information—from the point a work order originates from the clients, to deploying inspectors or contractors to complete the work, processing and quality assuring the results, and reporting them back to the clients?

For field service companies like Safeguard, that manage millions of transactions flowing in and out of their systems, the key to success is to ensure work is routed efficiently, thus minimizing

idle time throughout the end-to-end business process. This is crucial because field service companies are measured based on time to completion of an order, in addition to the quality of work performed at a property.

The results of work reported back to the company from the field are systematically evaluated. Pre-defined business rules are then applied to route orders to the appropriate operations team. Routing of orders into “queues” enables effective management of work based on priority, client, employee skill set and availability. Advanced queuing is essential in modern workflow systems. Rather than pushing work to individual employees who may not be available, queues enable groups of qualified and authorized employees to pull work.

Another key driver to successful workflow in today’s field service industry



Operations and clients can know, at any moment, the status of work, either at the individual order level or aggregated for a subset of work order types

is data quality. Business processes and rules can be defined to effectively allocate work; however, if the data that the rules rely upon is suspect, the entire system will be compromised. Therefore, data quality controls must be built into the field workers' mobile apps to the extent that the information collected will initiate the appropriate workflow step based on the situation on the ground.

Business rules are built into the software as the workflow engine makes decisions based on client-defined guidelines, which are specific to each client and property

type. The automated workflow technology enables the company to prioritize work to meet service level agreements. Service levels are influenced by the effective systematic routing of orders to the field worker based on ZIP code, capacity, skill set, training and credentialing.

Internally, the workflow system is aware of services through a role-based definition or business rules. This means that employees are slotted into roles correlating to their abilities and authorization levels. Each work item is assigned to a group or queue—only allowing

employees in specific roles to work in specific queues. It removes manual decision-making and enforces security controls, which contributes to compliance for the company and its clients.

Additionally, the workflow system must be aware of the state of the employee—if he or she is in the office, in a meeting, on break or on vacation—in order to make appropriate staffing and allocation decisions based on the volume of work. That information is used to measure the productivity of the work routed versus the people available to do the work.

For example: An employee is working in the office in the morning but has to leave for a personal appointment in the afternoon. A manual process would utilize a spreadsheet of the work order volume for the day that gets distributed in the morning and would not account for the employee who had to leave. The work orders he or she was assigned for the day would not get completed in a timely manner. However, utilizing a modern workflow system, the other employees in the “queue”, who are qualified to perform the work, would be automatically assigned.

The software also can add an effective operational control by preventing employees from choosing or cherry-picking work that is easy to do. This ensures that all work gets done based on its priority as determined by the client or operations manager. The system can identify when a work item is complete because it must validate all actions are done properly before giving an employee the next order in the queue. This feature of the workflow system can have a dramatic impact on quality.

Visibility is another key feature in an effective automated workflow system. Operations and clients can know, at any moment, the status of work, either at the individual order level or aggregated for a subset of work order types. Effective workflow software has to provide visibility at company, client, worker and work order-type levels in order to identify opportunities to improve efficiencies.

The most effective workflow system is a sophisticated set of business rules that allows for dynamic routing of work based on client priorities and operational workforce design. End-to-end integration from order creation to the mobile field app and back into the operational units is the key for driving compliance, productivity and quality. Ultimately, automated workflow enables field service providers, such as Safeguard, to meet its commitments to the communities and clients that they serve. 