



# Field Force Manager Implementation Best Practices



## Training Tips and Reminders for the Field Force Manager Administrator or Trainer

- The proper usage of the Field Force Manager phone will provide useful reporting and mapping. By following the steps outlined in the training, you will be able to properly train your mobile workforce.
- It is required that your workers charge their mobile phones properly. An extended battery and vehicle power adaptor are also recommended, depending on usage.
- Proper Field Force Manager application usage on the mobile phone will provide the following data in the Activity Log of a worker's detail page in the Field Force Manager Web portal:

<b>05/12/08 06:00 AM</b>	Session	Login
<b>05/12/08 06:15 AM</b>	Timesheet	Start Shift
<b>05/12/08 02:53 PM</b>	Timesheet	End Shift
<b>05/12/08 02:55 PM</b>	Session	Exit Field Force Manager

*Note: Start Shift and End Shift functionality is only available in the Basic and Premium packages.*

- Allow for a ramp-up period for your mobile workforce to get used to using the new system.
- Dedicate some time to organizing your thoughts around the discussion you will have with your employees to introduce this project. Focus on the business benefits and new opportunities this technology presents to the business and to each individual. It is not uncommon for employees to be wary of this technology since it involves gathering detailed location and activity information. They will want to understand how you intend to use this information, so be prepared to discuss your strategy.
- Key points to emphasize:
  - Automated timecards (less paperwork)
  - Employee accountability
  - Status tracking (knowing when workers are available for work or not)
  - Driving directions (convenience)
  - Safety (knowing workers' locations or last known locations)
  - Routing efficiency
  - Reducing phone calls
  - Reporting (customer audit trails)

- Become an expert at using the mobile phone application yourself. Before training your employees, take a few days to use the mobile phone and application and practice different “what-if” scenarios (i.e., low battery, forgot PIN, etc.) so you can share your experiences with your employees. This will help you troubleshoot any issues and allow you to share simple tips and tricks that you picked up while learning yourself.
- Appoint a few project leaders among the mobile workers to help support your efforts. Providing your mobile workers with a peer support group will help them be more receptive to the technology. You may want to consider having your project leaders use the application for a few days before training the entire team.
- Provide mobile phone training as part of a regular team meeting to minimize your employees’ time away from work.
- Provide each employee with a printout of the training materials. You may want to consider having the training sheet laminated so they can keep it in their vehicles for future reference.
- Log in to the Web portal every morning for the first few weeks to make sure that mobile workers are using their phones properly. Spending a few minutes each day to remind those who may forget to start Field Force Manager on their mobile phones will instill a usage pattern that will save you time and frustration later on.

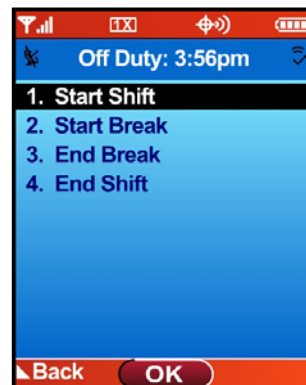
## Daily Phone Procedures

Following is a step-by-step illustration of how a mobile worker typically uses Field Force Manager. This section can be given to employees for training purposes.

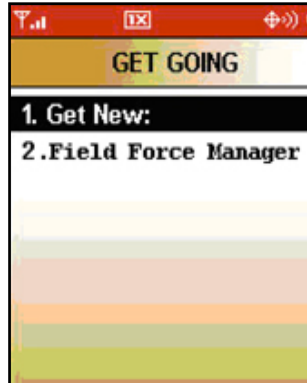
After starting the application, users will be taken to the Field Force Manager main menu. From there they can access their jobs, forms, locations, messages, and timecards. Features and functionality differ depending on the Field Force Manager package purchased.



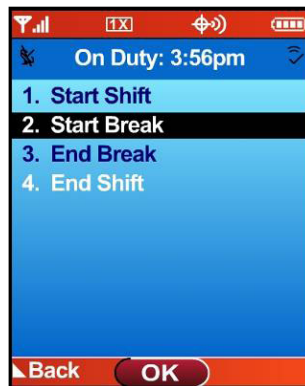
To "punch in" to a timesheet, select **Timesheet** from the Field Force Manager main menu. From the Timesheet menu, press **Select** while **Start Shift** is highlighted. Next, users can either return to the Field Force Manager main menu or suspend Field Force Manager and return to the phone main menu.



To resume Field Force Manager, press the **Menu** button, select **Get It Now**, select **Get Going/Tools on the Go**, and select **Field Force Manager**.



After resuming Field Force Manager, users are returned to the last screen they were on before suspending the program. If they need to perform an action such as starting or ending a break, they can do so before suspending Field Force Manager again by pressing the **Red Phone** key.



At the end of the day, users can choose **End Shift** in the Timesheet menu. After they have ended their shifts, they can return to the Field Force Manager main menu, then choose **Exit**. If auto-shutdown is enabled, the application will automatically exit at the end of the designated hours of operation.



Before completely exiting Field Force Manager, users are prompted to confirm that they wish to exit Field Force Manager by choosing **Yes**. Exiting the application will stop location tracking until the application is started again.

