

Fieldporter Plus in action

WHAT IS IT?

Fieldporter Plus is a process and software management tool that takes care of integrating company strategy, operational activity and the engagement of people.

HOW DOES IT WORK?

By linking with existing systems it sets up a user-friendly, transparent interface between the workforce and company goals.

WHERE IS IT USED?

Fieldporter Plus is in use in 70 countries for thousands of people.

BEST SUITED FOR?

Medium to large-scale organisations, particularly those involved in sales and service and working in a multi-cultural, complex and competitive environment.

LIKELY

BENEFITS/RESPONSE:

Alignment of effort, more accurate forecasting, greater productivity, higher yields in new markets, improved staff satisfaction and staff retention: lower costs.

Set up cost:

Charged for time in set-up phase. Monthly subscription covers maintenance and upgrades. Cancel any time.

A COMPANY AIMING TO SUCCEED?

It was a tough call. But when Fieldporter's team worked on a major tactical and strategic project, they knew the results were unlikely to hit the mark. The aim was admirable; to restructure and to get the company strategy rolling out.

The team was bold enough to comment directly on their chances of success: "None of this is going to happen because your compensation schemes don't match your strategy." The intended outcomes were unlikely to be achieved simply because of the way they rewarded staff.

It could have been taken as a throw-away line, but it struck a chord with the client and a month later they were back again. This time to do something about the problem they'd identified.

They were convinced that for the identified benefits to take a hold, those managing the process would need to know what was being done, who was working on what, where (geographically) they were, and how much was being paid out to reach their targets. The current corporate remuneration scheme couldn't handle this; yet essentially knowing the answers would drive the performance change the company needed.

To mobilise and unify the effort involved required a motivated and integrated workforce. The large number of people who would implement the strategy needed a different and effective way of being rewarded – one that sharply connected the work of each individual to their remuneration.

Fieldporter viewed the way bonuses and rewards operated within this company as ineffective. Strategies were confirmed, projects outlined, and targets set. But the company often found itself unable to react to changing market conditions with the speed necessary to compete fully. In other words, the existing reward schemes didn't motivate staff to focus on the company's top priorities.

Furthermore, the company was often unable to quantify the costs and returns of reward schemes until a considerable period of time after launching the schemes.

But the company did have the essentials for an effective reward system: a variable payment mechanism for staff, and a culture that recognised and rewarded top performing individuals and teams.

They were never going to make it happen. The reason seems almost too simple: Their compensation scheme didn't match their strategy.

Were current bonuses really giving a return on investment?

Out of this challenge grew *Fieldporter Plus*, a software tool to manage and motivate people and maximise productivity. This tool enabled the important projects to be prioritised; it meant that every activity of every staff member could be tracked and rewarded; it enabled the creation of “virtual teams”, encouraging cooperation across regions and departments; it improved forecasting significantly because of the increased accuracy of the data available; and for the company, it showed exactly how on-track they were. As one of the executive management team commented, it finally gave those leading the company the *line of sight* they’d always wanted.

This tool enabled the important projects to be prioritised; it meant that every activity of every staff member could be tracked and rewarded. And better data meant significantly improved forecasting.

In terms of process, the executive management team confirmed the business objectives for the next period (the company’s quarterly cycle). This wasn’t a new step of course, but what was new was the capturing of these zones of activity in *Fieldporter Plus*. These targeted activities, named campaigns, would together achieve the business objectives. The focus was tight - each campaign had just one key performance indicator.

The 40 or so campaigns this organisation set up for each quarter covered a number of areas; for example, managing and progressing leads within sales groups, and achieving agreed outcomes and targets with service staff, production teams, and support and administrative staff. (Since the initial programme, campaigns have also involved compliance, and health and safety programmes, and they have included both strategic and short-term tactical actions.)

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A key element underpinning the success of the system with this client was alignment. Campaigns focused the work of individuals through integrated activity. The effort of individuals involved in a campaign might have been very different, but that effort contributed to the total result. The level of co-operation that eventuated was striking.

Fieldporter Plus was able to significantly improve the link between targets set by the executive management team and individuals in the company by telling them how they would be rewarded for their contribution to reaching those targets. The system generated a letter telling each individual what to work on. It told each staff member exactly what was expected and how much money each individual could make. It identified where on the website all the information needed for that particular campaign could be found - from the link to the mission statement right down to what specialists within the company would support their effort.

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As *Fieldporter* predicted, when the outcomes achieved by individuals were linked effectively to their remuneration, a new level of momentum was achieved.

The links to financial rewards came through two levels: personal activity and/or team activity. At any time those involved could see instantly who made up the team for a particular campaign even at the global level, and they could see who they could link with to achieve their targets. Moreover, the transparency of the system meant that everyone knew exactly the goals everyone was working towards.

GETTING RESULTS FROM NEW MARKETS

This transparency of the reward system also resulted in some interesting successes. With this global company it yielded surprising results in new markets. Previously, the company had attempted to extend their markets geographically by sending staff from existing areas into the new market, have them work with whoever was on the ground there, apply their best practice models, and wait for the results. But that was expensive, slow, and often didn’t encourage local personnel to apply local knowledge.

So when the company looked at opportunities in minor centres they approached it differently. Using *Fieldporter Plus* the staff involved could see who was in the team and what the expectations were of each of them. They engaged remotely to exchange information and tactics, reported on their progress, updated the strategy and results to date, revised the approach as necessary – and so on.

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Of particular interest was that this approach often yielded new business and market development opportunities that were invisible to others elsewhere – those in the central office for example.

Prior to the use of *Fieldporter Plus*, the smaller and more remote centres sold and managed a small range of relatively simple products and services; after the introduction of *Fieldporter Plus*, the capability of the organisation as a whole increased - and with less staff involved. Consequently, the company was better able to deploy its people and resources.

Fieldporter Plus was designed to help teams and individuals find and capitalise on business opportunities. Campaigns have typically had a success rate around 75% – way beyond previous performance levels. This has been particularly noticeable when big-ticket items are involved.

LINKING WITH EXISTING SYSTEMS

This *Fieldporter Plus* client had experienced complex software programs that attempted to interface with their organisational ERP system and a major CRM system. *Fieldporter Plus* has kept it simple and functional and so integration for this client (and others since) was seamless. Rather than build complex interfaces, the web-based system focuses on simple interrogation of existing data and clear presentation of the results. It moves effortlessly to deliver information to Excel and Word and enables efficient transfer of the requested information into instantly usable formats for real people.

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SO HOW WAS IT ACCEPTED?

While there was the usual spread of supporters, enthusiasts and dissidents, it was the percentages of each that were interesting. About 10% of those involved represented the usual numbers uncomfortable with any sort of change; another 10% felt uneasy with the level of accountability *Fieldporter Plus* introduced. What was interesting was the large group (well over 50%) who were delighted to be told what to do, how to do it, and how success would be measured. The Unions also gave it a stamp of approval, simply because of the level of transparency it introduced.

What was interesting was the large group (well over 50%) who were delighted to be told what to do, how to do it, and how success would be measured.

They also liked the way it worked as a straightforward mechanism for enabling people to prioritise their work: the resource allocations for each individual gave a clear idea of the company's view of the importance of an activity. The size of the rewards for achieving or excelling in the various targets also reinforced that message. *Fieldporter Plus* consultants also noted that *Fieldporter Plus* could be used for non-financial rewards - for example, staff could collect points that could be used to buy a day of holiday, extra training and similar.

The company was not only able to execute its business strategy with far greater precision and greater success, but they achieved the alignment that was lacking in their previous attempts. *Fieldporter Plus* enabled thousands of staff in 70 countries to integrate their efforts. It also sharpened the business planning of senior management. Success was based on an effective operating rhythm – going from determining business objectives critical for a particular timeframe, creating the teams that would make it happen, ensuring they did just that, and rewarding them effectively for their success.

AND THE INSTALLATION COSTS?

The initial outlay was that of time. Fieldporter's consultants began by working with the company staff – to explain the process to the various levels within the company and to set up the system. (Fieldporter's consultant Tony Hopkins says experience confirms that companies can expect between 10 and 50 days of consulting for this initial step.)

The set-up phase largely involved extracting information already in organisational databases. With the infrastructure and reporting systems already in place this was accomplished relatively quickly.

Hardware requirements and operating system software were minimal and within the capability of the company's existing servers. Fieldporter supplied the software.

Various other regions and functional groups within the company were later incorporated into *Fieldporter Plus*.

SUMMING UP: HOW DID THEY BENEFIT?

Perhaps the greatest success with this company has been the ability of *Fieldporter Plus* to not only significantly improve productivity, but also to manage the response to critical incidents – things like mergers, acquisitions, and extreme competitor threats. As one of the executive management team commented; "Success is all about our *line of sight*, and that's what you've given us."

In a nutshell:

Fieldporter Plus enables organisations to balance resources to achieve business objectives. It tracks activity and monitors both individual and company performance. Costs are controlled and sales are more accurately predicted. It provides a transparent mechanism to reward individuals and teams for high performance delivered consistently. Goals are shared and team spirit and effort across the business is enhanced.

With this tool, medium to large-scale multinational companies can align their effort and achieve outstanding results.

Fieldporter

- A business process and software tool that enables organisations to balance resources to achieve business objectives.
- Tracks activity and monitors both individual and company performance
- Effective control of costs; more accurate prediction of sales
- Provides a transparent mechanism to reward individuals and teams for high performance delivered consistently
- Goals are shared; team spirit and effort across the business are enhanced.