# SKYLLFUL

Maximizing Field Productivity with
Performance Support & Workflow Learning

Field service workers play a pivotal role in delivering seamless operations and exceptional customer experiences. However, the accurate execution of field service workflows can be hindered by the lack of proficiency in using field service software and technology.

This is exacerbated by the complexity of field service tasks and the reliance on mobile applications. A recent study revealed that **nearly 50% of technicians find their tools and technologies difficult to use**.

With field technologies so tightly integrated with field sales & service workflows, achieving technology adoption and proficiency is critical to organizational success. According an IFS survey, **change management and user adoption of new technology was ranked among the top 3 challenges (37%) service organizations currently face**.

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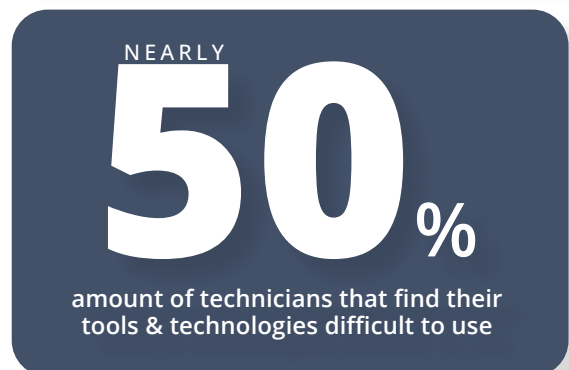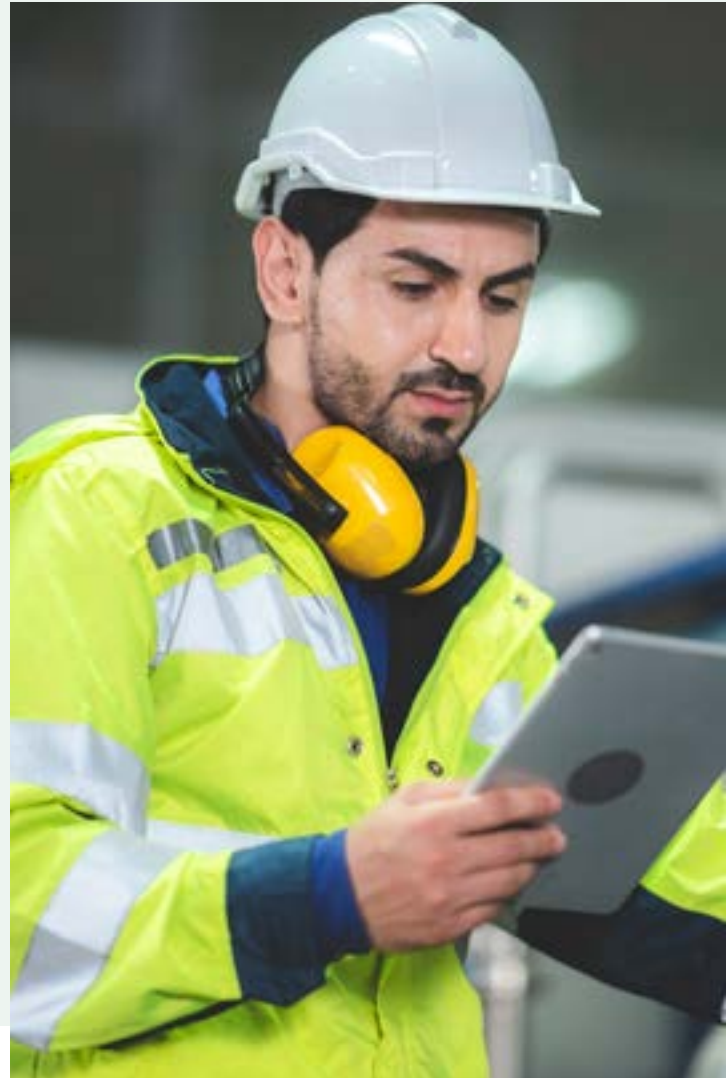
Why?

Poor adoption and user proficiency with software applications can create significant downstream issues such as: missed service level agreements (SLAs), low first-time fix rates, increased parts leakage, reduced technician utilization, and dissatisfied customers.

One of the main challenges field organizations are facing is the limited access employees have to content and knowledge support in the moment-of-need. What is too often overlooked and under-supported by current learning programs is the ability for employees to learn and apply knowledge in the flow of work.

In this report, we'll discuss the importance of performance support for field workers and explore effective approaches to implement workflow learning.

App Complexity, Outdated Training Lead to Service Errors

A primary reason field service workflows are frequently executed incorrectly and inconsistently is because **employees lack the necessary understanding of how to effectively utilize their field service software and technology**. Complex workflows that are highly intertwined with mobile field service applications, create an environment where confusion and errors can easily arise.

The need for technicians to follow varying processes based on unique customer requirements further adds to the complexity. The primary source of support for field technicians is other humans: according to the Service Council, **81% of technicians say that calling co-workers is their primary source of support**.

This burdens field managers, supervisors, or higher-performing technicians within their teams, and places greater stress on overall field productivity.

Let's examine these causes a little deeper.

COMPLEXITY OF FSM APPLICATIONS & WORKFLOWS

Field service workflows encompass intricate procedures and interdependencies. According to the Service Council, **91% of field technicians indicate that greater knowledge is required today compared to when they started in field service**. Mastery of these workflows requires a deep understanding of the associated mobile field service software applications.
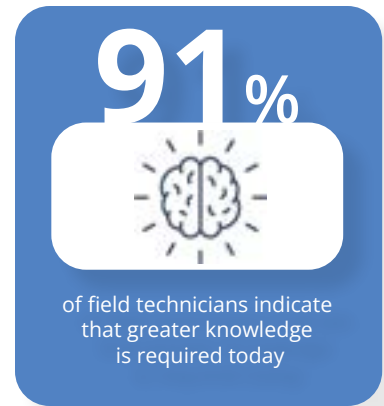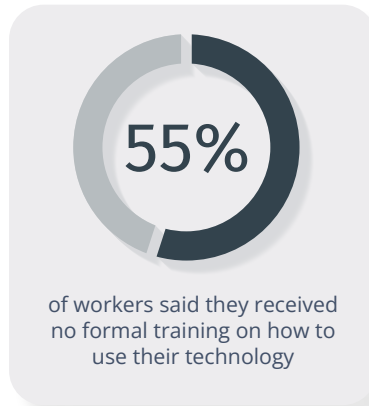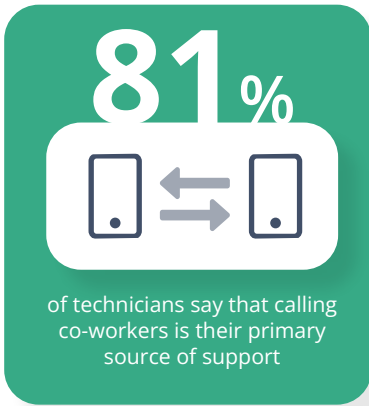
LACK OF FORMAL TRAINING

Formal training on software or technology is often non-existent or ad-hoc, leaving technicians ill-prepared to tackle complex field service workflows. In a recent Microsoft study, **55% of workers said they received no formal training on how to use their technology**. In many cases, it is assumed that field managers and supervisors will teach team members how to effectively utilize their software and workflows. In reality, this becomes a game of "telephone" with critical information being lost in translation, causing inconsistencies across the organization.

OVER-EMPHASIS ON UP-FRONT TRAINING

While the majority of time and effort is spent during employee onboarding, or pre-launch training (in the case of new technology launches), research clearly shows that retention is difficult to achieve with up-front learning alone.

These training programs predominantly rely on long-form, static content such as PowerPoint presentations, word documents, or videos, which are time intensive to complete, difficult to absorb, and cumbersome to reference after-the-fact.

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How to Create a Performance Support & Workflow Learning Approach

In order to empower field service workers and enhance their performance, organizations need to focus on providing learning in the flow-of-work, ensuring that knowledge and support are available in the moment of need. To achieve this, Operations and L&D leaders need to think about the realities of learning for field workers:

How much time do they have for training?

What devices do they use to access information?

How do they learn best?

All of these factors dictate how performance support should be designed and delivered. Here are some key considerations in designing a true frontline learning experience:

CONTEXTUALIZED LEARNING

Designing learning modules and lessons that align with field technician workflows is crucial. By integrating training directly into the technicians' work context, they can acquire knowledge and apply it immediately, reducing the gap between learning and real-world application. This approach, known as **workflow learning or learning in the flow-of-work**, has shown significant benefits.

OPTIMIZED CONTENT

Front-line workers don't have the time to sit through long modules and lessons. They need **micro-learning content that can be consumed quickly, on-demand, where and when they need it**. And the format is crucial here as well — quick walkthroughs, simulations, videos or short-form reference articles work best. Content needs to be optimized for consumption in the flow-of-work.

ON-DEMAND ACCESS

By offering on-device and on-demand access to learning content via their mobile devices, technicians can conveniently access information and resources without disrupting their workflow. This approach **promotes continuous learning and empowers technicians to resolve challenges** more effectively.

RELEVANT AND ACTIONABLE CONTENT

Identifying the most relevant information your field workers need access to in the flow-of-work is vital. For example, this might be information related to equipment maintenance and repair or diagnostics; customer-specific instructions; or environmental health and safety procedures that field employees may need to apply in a particular situation. **Ensuring the availability of up-to-date and accurate information equips technicians with the knowledge required to remain productive and confident**.

HANDS-ON, INTERACTIVE LEARNING

Interactive learning content such as **app simulations, offer a powerful solution to enhance the abilities of field service workers in executing workflows accurately and efficiently**. Hands-on performance support tools that provide an immersive experience can provide a safe environment for employees to learn, while improving knowledge retention.

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Achieving excellence in field service operations requires a strategic approach to address the challenges faced by field employees. By implementing performance support and workflow learning initiatives, organizations can empower their workforce with the necessary knowledge and resources to execute field service workflows accurately and consistently.

Learning in the flow-of-work ensures that field service technicians have access to relevant and actionable information in the moment of need, reducing errors, improving productivity, and enhancing customer satisfaction.

By embracing a continuous learning culture and leveraging technology-enabled tools, organizations can foster a proficient and productive field workforce.

*Learn more about **Skyllful for Field Service***