



We simplify field work.

Best Practices for Monitoring Employees in the Field & Maintaining Trust

Should I Monitor my Employees?

In short:

Of course. In fact, most managers probably already are. The duties of a field team manager or small business owner almost always include reviewing the work that their team has accomplished and giving feedback based upon those results. In an office setting, managers and team leaders are free to walk around and check-in with employees, both to make sure that they are on task, and to offer advice and help if needed. When the duties of employees require them to work outside of the office, in a field setting, these luxuries are lost, and a great deal of efficiency can leave with them if the transition is not handled correctly.

So what steps should managers take to prevent this loss of efficiency and keep their business running smoothly?

1. **Decide what metrics need to be monitored**—This could include employee location, hours worked, vehicle mileage and more.
2. **Decide what tools are needed to monitor these metrics**—Mobile devices, apps, and software are all possible solutions.
3. **Decide how to present this solution to employees**—Monitoring in the workplace can have a negative stigma attached to it, legitimize its purpose with employees.
4. **Ensure that the solutions in place are legal and ethical**—A bond of trust between a business and its employees is vital to continued success.

Using a structured approach when implementing a system of employee monitoring allows managers and business owners to look at the entirety of their business operations, making sure that every process is happening as it should, and that employees are being treated fairly at the same time. By following the steps outlined in this guide, the execution of a successful employee monitoring system can become painless for employer and employee alike.





Developing a Monitoring Strategy

What Should I be Monitoring?

This should be the first question that any manager asks and answers before moving forward. Every business is unique and will have its own metrics to monitor, but there are certain characteristics of representatives working in a field environment that are virtually universal.



- **Location Tracking**—Employees working in the field will be on the move for most of their day, and making sure that they are visiting with customers at the correct time and location is incredibly important. More importantly, location tracking protects the best interests of every party involved. The business owner or field team manager gets the assurance that their team is performing all of the duties they are expected to, consumers benefit from improved customer service, and employees have proof that they are fulfilling all of their duties if a dispute arises. Employee tracking technology acts as an arbiter for every member of the sales or promotional process that takes place in the field, and [real-world implementation of such solutions](#) show that it is effective both as a deterrent from bad working practices and as a creator of communication throughout the company.

- **Work Time Tracking**—Something that exists in nearly every office, work time tracking can complement location tracking very well. The benefits of having a way to measure work time are clear: Business owners or field team managers can rest easy knowing that their business's time and resources are not being wasted on unproductive tasks. At the same time, employees are guaranteed fair compensation for the work they've done, meaning that any disputes that arise can be handled quickly and painlessly.
- **Geo-Tagging and Photo Tracking**—For those field employees who may be acting as merchandisers or mystery shoppers, having a way to visualize what is happening in-store is an invaluable tool. Field representatives can snap a photo with their smartphone or tablet and let their manager see what is happening at their location in real-time. For CPG or Food & Beverage companies, employees will be able to show that their product displays are correctly set-up, their inventory is stocked, and even what competitors are displayed near their product. Business owners now have the luxury of seeing that individual stores are being maintained in the way that they should. There are plenty of other applications for Geo-Tagging and Photo Tracking in non-retail environments as well, and it is up to the manager or owner implementing a monitoring solution to identify ways in which it can be best used for their business.

If it remains unclear what field managers and business owners should be monitoring, it can be helpful to look at what KPI's or metrics for success are currently being measured by the organization. Generally, these metrics are the aspects of the business that should be monitoring in the most detail, as they will deliver the clearest picture of how successful the business is, and where it can improve.



What Should I Use to Monitor Activity?

Mobile devices are the clear choice for businesses looking to optimize productivity in the field. There exists today a plethora of mobile applications that offer full-service solutions to business, tying together the monitoring, communication, and order management aspects of field work. Additionally, many of these mobile applications offer desktop software integration which allows a manager at a central location to interact with all of their employees in the field and analyze their data in real-time.

Whichever software solution an organization chooses, there are two very important decisions to be made. The first decision is a question of hardware, while the second is a policy decision. Both choices influence the entire organization, and managers should weigh the pros and cons of each solution before rushing to a decision.

Smartphone Or Tablet?

Smartphones offer increased portability compared to the average tablet, and notably, have the ability to make calls. Although network data plan can be purchased for tablets, nearly every smartphone will have data supplied by the carrier the business chooses. Finally, many employees may be familiar with how to use a smartphone interface, while many employees may struggle with tablet adoption.



EMPLOYEES IN THE FIELD: SMARTPHONES VS TABLETS

SMARTPHONES



TABLETS



Screen Size
(Average)



BATTERY TIME
(HEAVY USE)



OS



OWNERS



\$337

PRICE

\$386

SOURCES :

http://www.phonearena.com/news/Did-you-know-that-smartphone-screens-nearly-doubled-in-size-since-2007_id52067

<http://tablets.findthebest.com/app-quest-on-642/What-is-the-average-screen-size-of-a-tablet-computer>

<http://tgr.com/2013/1/26/smartphones-average-selling-price/>



Master your field.

Tablet computers on the other hand, offer a larger screen space that is fantastic for giving live presentations, accepting signatures for proof of delivery and services, and video conferencing. If field representatives will be doing any typing longer than a few form fields at a time, a tablet can offer a large keyboard, or even a Bluetooth keyboard attachment that makes typing much easier. A final benefit: Newer tablets offering much of the same software that is available on traditional laptops and desktops, such as spreadsheet and word-processing applications.

BYOD or COPE Policy?

An important policy decision businesses will need to make is whether they will provide employees with mobile devices or allow them to bring in their personal devices from home. A BYOD (Bring your own device) policy means that employees will be familiar with the device they are using and won't need as much technical support. This policy also allows companies to avoid paying for data and carrier costs. While this is a great benefit to businesses, personal devices bring their share of problems with them, such as security concerns.

A COPE (Company owned, personally enabled) policy means that businesses supply smartphones or tablets to their employees and cover all data and carrier related costs. The cost of maintaining the devices is often offset by decreased security and management costs. Additionally, a COPE policy is often seen as a perk by employees who are getting a device free-of-charge. Businesses may find it easier to install and maintain their employee monitoring software when using a COPE policy, but in the end, the decision will depend on a number of factors including company size, budget, and the software chosen.



BYOD vs COPE



82% Of Employees Think That Smartphones Play A Critical Role In Business



The Other 12% Are Wrong



What if my Employees Don't Like the Idea of Being Monitored?

What may be the most important part of the entire activity monitoring implementation, active and open communication with employees is absolutely necessary to maintain the relationship of trust and teamwork throughout an organization. Oftentimes there is a stigma attached to employee monitoring which makes employees feel like they are not trusted to do their job well. Employers should inform employees about what is happening throughout each step of the implementation process, and explain the overall benefits to the organization, as well as the individual benefits employees will be getting from such a solution.



Field Representatives have the ability to defend themselves from being mistreated—whether by the business or customer. Employees should be assured that their personal life is not being invaded in any respect. If employees understand that businesses are being upfront with them before implementing a solution, they will be much more willing to adopt it, and any questions or concerns that employees may have can be addressed before the system is implemented and becomes a problem.

“Research indicated that employees have three prime needs: interesting work, recognition for doing a good job, and being let in on things that are going on in the company.” -Zig Ziglar

Is it Legal to Monitor my Employees?

GPS Location Tracking—While the legal landscape is always changing, the overwhelming majority of court decisions in the U.S. and around the world have decided that it is indeed legal to use GPS tracking technology to monitor employee location.



Communications—The legality of monitoring phone calls and other methods of communication varies from place to place, but is almost always legal. The exceptions to this vary from state to state, but as a general rule, if an employer is listening in to a phone call, they must immediately end monitoring when they realize that the call is of a personal nature.

To determine the legality of proposed a proposed monitoring system search for privacy laws by state or country. Read [here](#) for more information on privacy rights.

Maintaining a Monitoring System

Once a monitoring system is in place, employers should make sure to update any employee handbooks to reflect the new policies that have been put in place. Additionally, employers should hold regular meetings regarding the usage of monitoring systems in order to gauge employee opinion and make changes as necessary. Although integration of any new system or policy within an organization can be a difficult task, field Managers and business owners who use this structured approach to employee monitoring in the field will begin to notice positive changes in employee behavior and work performance.



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