



We simplify field work.

Best Practices for Integrating Field Activity Management Software Into Operations

Deciding on a Software

Where Do I Start?

For Field-Based organizations, staying competitive means adapting quickly to new technology and utilizing that technology in ways more creative than competitors. What is becoming quickly apparent to managers in such fields as medical supplies, luxury goods, and the food and beverage industry is this: The old way of doing things—using paper forms and large, complicated, software—is no longer efficient.

CRM and customized software still serves a genuine purpose for massive corporations who utilize every aspect of the software suite. Unfortunately, a prohibitive cost and lack of flexibility in CRM meant it was never a viable option for small and medium businesses who were hoping to compete on an equal playing field with their larger competitors.

Today, Field Activity Management Software offers an affordable and efficient solution to entrepreneurs, small businesses, and medium businesses. Managers who leverage such flexible and simplistic software have seen improvements from their representatives in the field among other benefits.

Although the benefits are clear, many managers and business owners are hesitant to adopt Field Activity Management Software, fearing a disruption to existing systems, or backlash from employees. While an aversion to change is not uncommon in many organizations, those who are willing to make a concentrated software integration effort will reap the many benefits that Field Activity Management Software provides. This Best Practices Guide offers tips on how to integrate Field Activity Management Software into existing business operations, step-by-step.



Look at Existing Systems

Before beginning your search for new software, it is beneficial to review current software systems. If you are using a single software suite for all of your organizational needs, prioritize those features which are most important to the company. At the same time, survey your team of field representatives and other members of your organization to better determine where improvements need to be made in the existing system.

Truly effective Field Activity Management software should, at a minimum, perform the following functions well:

- **Field Rep Monitoring**—Great software will give representatives the ability to check in with managers from the field, using the GPS function on their mobile device.
- **Customizable Digital Forms**—Eliminating physical paperwork and replacing it with digital forms which can be tailored to unique situations should be high on the priority list for any field-based organization.
- **Real-Time Data Communication**—Cloud-Based software platforms allow reps in the field to send data to their managers in real-time, allowing businesses to become more reactive to events in the field as they happen.
- **Order Management Tools**—Regardless of the industry, order management allows reps to perform inventory audits (monitoring price and promotion accuracy), replenish customer orders, and avoid Out-Of-Stock instances.

Once software which meets all of your organizational needs is found, determine whether or not the solution is cost-effective. If the software clears this final hurdle, it is time to start thinking about integration. To better foresee how difficult the integration process will be, managers should review their current field team's adaptability to new technologies.



Existing Team Ability & Adaptability

“For Success, attitude is equally as important as ability” –Walter Scott

Averseness to technological change is a serious problem for many companies. It is very easy for employees, especially those who have been at the company for a long time, to become set in their ways and resist any change which shakes their established system. There are, however, ways in which managers can help their teams transition smoothly into new technology.

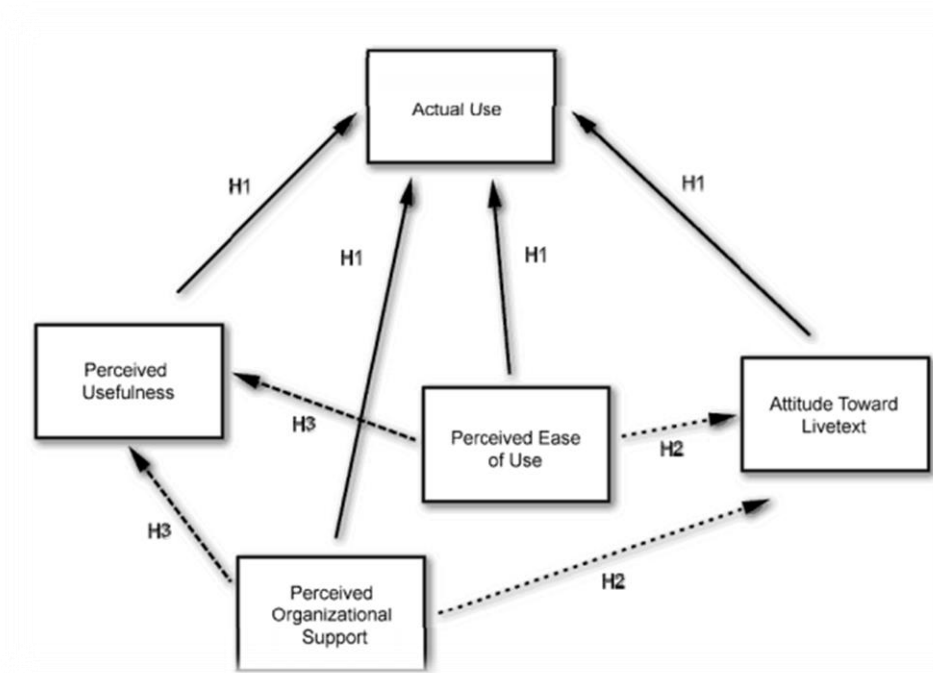
[A 2008 dissertation study performed at Florida Atlantic University](#) by Daniel Siegel draws on motivational theory to determine what influences the actual use of new technologies when they are presented to employees. There are four major determining factors as to whether or not employees use a new technology:

1. Perceived Organizational Support—Affecting the perceived usefulness, employee attitude, and actual use of a new technology, reassurance that employees will be supported throughout the implementation of a new software is vital to its success.
2. Perceived Ease of Use—Another factor which affects perceived usefulness, attitude, and overall use, ease of use should be made clear to all employees to encourage quick adoption.
3. Perceived Usefulness—Affecting actual use of the software, the perceived usefulness of the software solution you choose will have a large impact on employee adoption rates.
4. Attitude Toward Field Activity Management Software—The final usage factor, attitude can be affected by peer opinion or other external factors. Relieve any worries employees may have about this type of software to ensure the greatest possible usage rate.

These four factors will be what determines whether or not software succeeds within your organization. For a clearer picture on how exactly these factors build



upon and influence each other, take a look at this diagram from the aforementioned study.



Introducing the Software

How Do I Begin Integration?

Integration should always be prefaced by a team meeting or company-wide newsletter to avoid the shock that often comes with a big change in operations. Put at ease any worries your employees may have about the new Field Activity Management software, emphasizing the benefits they will receive and how it will aid them in their daily routine.

Based on the feedback received during this meeting, managers will be ready to construct a roll-out strategy that is best suited for their particular team. While some teams will be ready for immediate company-wide or “blanket” roll-out, others will need gradual integration, also known as a “drip” roll-out.

Give the Team a Heads-Up

A team meeting is something that many organizations already perform routinely, collecting field rep feedback and informing team members about new happenings within the company. If your organization doesn't already hold meeting such as these, let employees know in advance that there will be a meeting regarding new software integration, and provide them with materials to look over before the meeting happens. This is important as it allows any preconceived worries to be assuaged, and lets employees to educate themselves.



Be Honest With Your Approach:

Don't sugarcoat the reasons for your new adoption, explain to field reps what you are expecting from them, and how you feel Field Activity Management software will help them with day-to-day tasks. Chances are there will be questions from worried employees—be prepared to answer them.

Choose a Roll-Out Strategy

Blanket Roll-Out

The blanket roll-out can be a fantastic way to bring cohesion to a field team unsure about their new software. It involves installing the software on every field rep device at the same time and ensuring that the entire organization understands and actually utilizes the software. For field teams that can easily adapt to new technologies and situations, a blanket roll-out may be the best solution.

Managers should make sure they offer some kind of training session or introductory period with the software so that employees have time to work out the kinks. Managers should also keep in mind that successful implementation should not be based on the number of employees who have the software installed, or are running it on their device. Instead, it should be measured by employee improvement and measured using intelligent metrics—preferably [KPIs \(Key Performance Indicators\) specific to their organization](#). Handling this roll-out strategy well means quick and smooth transition into new Field Activity Management software.

Drip Roll-Out

A drip roll-out can be much slower than a blanket roll-out, but in many cases it is necessary. This strategy should primarily target the most tech-savvy and least change-averse field reps in the organization, offering them the software before their peers. Managers should concentrate on closely supporting these individuals while providing other employees with positive news on the pioneering members' progress.

This strategy relies heavily on recognition of positive improvement and leading by example. Spend time with field reps during their day, use the new software alongside them and make sure that they are aware of your support.

A recent Harvard Business Journal [article written by Didier Bonnet](#) focuses on some of the most common problems managers and business owners have with new tech implementation. As Bonnet explains:

“The real return on digital transformation comes from embedding new work practices into the processes, work flows, and ultimately the culture of organizations.”

Plan your roll-out in advance and prevent a culture of business-related technophobia from developing within your organization.



Monitoring the Software

“True genius resides in the capacity for evaluation of uncertain, hazardous, and conflicting information.” –Winston Churchill

Preparation and implementation are incredibly important parts of Field Activity Management software integration, and their success should be celebrated. It is crucial, however, to understand that the efforts of managers cannot stop here.

Throughout the process of whichever roll-out is chosen, and consistently after complete integration, the monitoring and review of software adoption should take place. This may mean surveying employees regularly, or shadowing them while they perform routine duties in the field. Whichever methods are chosen, managers should be sure to collect employee feedback alongside their own observations. This means monitoring two key effects of the new Field Activity Management software—[how it impacts performance](#) and the effect it has had on team morale.

Effect on Performance

By using [KPIs \(Key Performance Indicators\)](#) that are specific to the organization, managers can easily see the impact that new software has had on various areas of business. This monitoring can be made even easier if done in conjunction with the drip roll-out. Simply take two field reps of relatively equal ability or performance and give the software to one of them. After a grace period where the rep can learn how to effectively use the new technology, compare [key metrics](#) from each rep against your intelligent indicators. With a blanket roll-out, allow the entire team a similar grace period, and then compare metrics from overall performance to pre-implementation data.



Effect on Morale

Managers too often forget that changes in technology can have a very real impact on team morale. Depending on the rep, this could be a positive or negative impact, but it is up to the manager to diagnose this change and take action to remedy it when negative. Go above-and-beyond traditional feedback collection methods by offering employee incentives for their input on the software transition. When leveraging any new technology, it is vital to have the full support of the field team. The new software is meant to be for their benefit as well as for the benefit of the company. Ensuring their happiness will go a long way towards improving performance in the field.

Looking at the Future

Even after a wildly successful implementation of new Field Activity Management software, there is no time to sit back and become complacent. Great managers continue the monitoring process long after initial integration is finished. This ensures the continued improvement of the team, and can highlight areas of the organization which may need to be reworked and tailored towards the new software.

By following the steps outlined within this guide, painless planning, implementation, and monitoring of Field Activity Management software integration is entirely possible. A careful look at existing systems and team composition helps managers to make an educated software purchase. Team managers can then give their field reps notification about the upcoming software transition, either through a team meeting or an alternative method. Choosing a roll-out strategy and offering employees a sufficient support network completes the integration step of the process. By then monitoring employee performance and morale using KPIs and feedback collection methods, managers will have successfully integrated Field Activity Management software into existing operations.



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