



FMI Case Study

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Founded in 1995, FMI is the leading provider of outsourced sales solutions to business across Northern Ireland and the Republic of Ireland. They currently employ 60 full time employees at head office, and maintain a network

One current contract involves supplying 100 field sales professionals to Electric Ireland to drive door-to-door sales of their energy services, for instance.

Problem



FMI's field sales representatives are responsible for visiting houses across Ireland, encouraging householders to switch energy providers. At the start of the Electric Ireland contract, assigning jobs to the field reps was relatively easy – they were each issued a batch of contacts records each morning, and they would work their way through the list.

The problems began once the client had signed the paperwork agreeing to a change of electricity provider. Many of the reps would send the paperwork by post, adding at least a day to the process as head office waited for the completed forms to be returned. There were similar delays if the field agent faxed the paperwork through after 4pm because it simply would not be processed by the accounts team at head office until the following day.

These delays were further compounded when it came to processing handwritten paperwork. The head office team, led by Kevin Teers, found that the data captured on the sign-up forms was frequently captured or transcribed incorrectly;

"Something as simple as indistinct handwriting caused us major problems when processing paperwork. We then had to expend even more time and energy trying to chase up the correct information – a needless waste of time and money."

"So although our field sales team were doing brilliantly, our processes were holding us back – we needed a system that would help us become more efficient and provide a better service to our clients."

Solution



Initially FMI tested a platform modified to support their operations. However the system never properly matched their processes, and was quickly discarded.

A recommendation from one of their contacts at Electric Ireland pointed them in the direction of PSI, a mobile-enabled system designed for field sales operations from the ground up.

“PSI really did ‘fit’ with our operations.”

PSI provides a mobile interface that allows head office to send contact lists direct to an app installed on the field sales operatives’ tablet/smartphone. The same app is then used to capture the customer’s data and uploaded directly to the main accounts system at head office.

“We were instantly able to do away with the legacy paper-based system and all the associated problems. Which was great for me particularly – before PSI was deployed I had to process the physical paperwork.

Outcomes



The move to instant data capture using PSI has greatly increased the efficiency of back office operations for the Electric Ireland account. Instant upload of data means that agents can begin the transfer of utilities provider in as little as thirty minutes, greatly improving the service they can offer to clients.

In the event that there is a problem locally, head office can deploy updated work plans within a few minutes. There is never any wasted days for the field agents, who can adjust their schedule accordingly.

The PSI system has also helped to reduce the instances of data errors. By having field agents collect data on site, and enter it directly into the backend systems, the margin for error has been reduced.

“We don’t have any more problems reading our field agent’s handwriting for starters. So there’s much less chance of it being transcribed incorrectly.”

Exploiting mobile technologies has had some unexpected benefits too.

“We had an agent accused of fraudulent activity recently, and PSI allowed us to provide a conclusive resolution. Using the geotagging features built into the PSI mobile client helped us prove where the agent in question was at the time of the alleged infringement. Happily we were able to clear him of any wrongdoing, because we managed to avoid upsetting a client and firing a valuable employee.”

Conclusion



FMI may not have noted a significant uptick in closed sales (which have been consistently healthy), but the gains at the backend have been considerable.

“Without any physical paperwork to process, we are pushing sales through the system more quickly than ever, which frees up time for other account management tasks that improve the service we offer Electric Ireland’s customers.”

“We would definitely recommend PSI to other businesses working in field sales. It’s easy to use, and all of the ‘heavy lifting’ is performed at the backend so your field agents can get on with their jobs – selling more subscriptions.”

“In fact, we are so pleased with PSI that we are looking at using it to support our other clients’ operations too.”



<http://www.psi-mobile.com>

info@psi-mobile.com

+353 (0)1 213 0921