

The challenge was to determine how to develop the best mobile application program in their industry to assist the client's customers with managing business while on the job and solving problems they faced in the field.

I was brought on to lead a team of designers and developers in order to create a solution that organized the daily workflow for technician's while streamlining the management of inventory.

In order to determine the stakeholders and need, the current mobile trends of the company were analyzed to establish the application user types.

# **B2B VISION**

## Job Tracker Application

# FERGUSON MOBILE TRENDS



**FERGUSON** Hi, Alexander | MY ACCOUNT 0 items

PRODUCTS SOLUTIONS SHOWROOMS LOCATIONS

Home > My Ferguson

## APPS FOR iOS & ANDROID

### DON'T JUST RUN YOUR BUSINESS, MAKE IT THRIVE

Install powerful apps, services & plugins to manage your business - anytime, anywhere.

FILTER BY BUSINESS

All



#### Project Management

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor.

[Apple App Store](#)  
[Google Play](#)



#### Where's My Stuff?

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[Apple App Store](#)  
[Google Play](#)



#### Ferguson Connect

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[Apple App Store](#)  
[Google Play](#)



#### Schedule Tracker

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[Apple App Store](#)  
[Google Play](#)



#### Inventory Management

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[Apple App Store](#)  
[Google Play](#)



#### Provisions on the Go

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[Apple App Store](#)  
[Google Play](#)



# FERGUSON MOBILE TRENDS



98% of Ferguson customers have a smartphone, and 65% have a tablet.

70% said they would download a work related app to their personal smartphones

48% of Ferguson customers polled about mobile activities said they would like to manage jobs in an app.

Gartner found 37% of field service managers were planning to use a mobile field service application in the next 12 - 24 months.<sup>(1)</sup>

43% of Field Technologies readers surveyed plan to deploy a mobile field service solution within 12 - 24 months.<sup>(2)</sup>

69% want service techs to have information in real time.

62% of field service managers were looking for improved data communication between field and back-office.

45% want to enable tracking of technicians, parts and products.

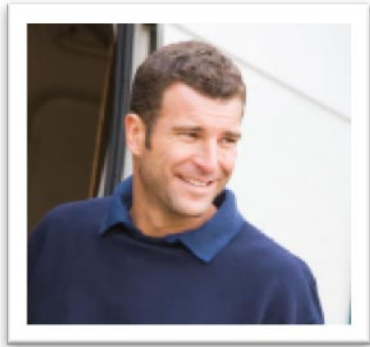
1. Gartner Field Service Management Survey April 2014

2. Field Technologies Magazine 2015 Field Mobility Survey

# USER TYPES



TECHNICIAN



JOB TRACKING APP



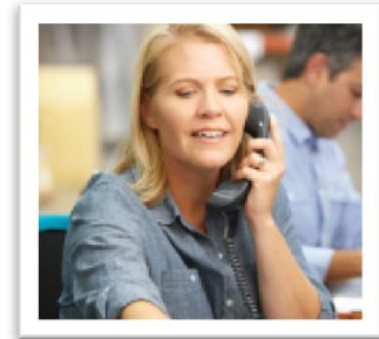
OWNER



INVENTORY MANAGEMENT APP



FRONT OFFICE



JOB TRACKING WEB



I had the team review the solutions that offered similar solutions to what our customer was looking for, and discovered that the available tools were office focused and difficult for technicians to use or they were cost prohibitive.



Service Task



Breezeworks



Jobber

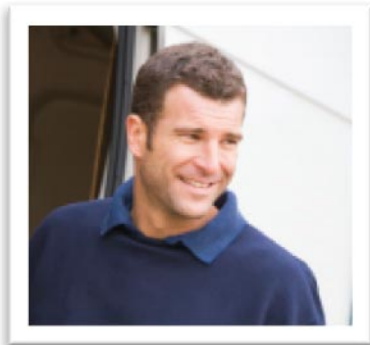


FieldAware

To find out more about managing jobs in an app we:

- Completed a day in the life study with 12 customers.
- Held a focus group session with 10 customers.
- Customer visits in New Jersey and North Carolina.
- Reviewed research and white papers about field service apps.

# CUSTOMER INSIGHTS



When in the field, techs need help with:

Communication: Where do I go next? What is the history at this jobsite?

Organization: How long did I work? What materials did I use?



When in the office, managers need help with:

Communication: Where are the technicians? How can I most efficiently tell them about changes in jobs?

Details: Receiving information to accurately bill the jobs. (Hours worked, materials used)



Throughout the day, owner/ operators need help with:

Insight: Where are the technicians? Are they busy enough? Is the team coordinated with my office staff?

Details: What materials are on my tech's trucks? Will the techs turn in the items they need replenished?

# CUSTOMER INSIGHTS

## TECHNICIAN'S DAY



### Prep for Day



- Drinks coffee and socializes with other techs.
- Reviews jobs for the day.
- Passes any information to office staff they missed turning in the night before.
- Replenishes truck with any items used the the day prior.

### Working Jobs



- Travels to job sites.
- Tracks time and materials used at each job.
- Contacts office, customers and sales reps via mobile phone.
- Picks up any orders as needed throughout day.
- Completes jobs.

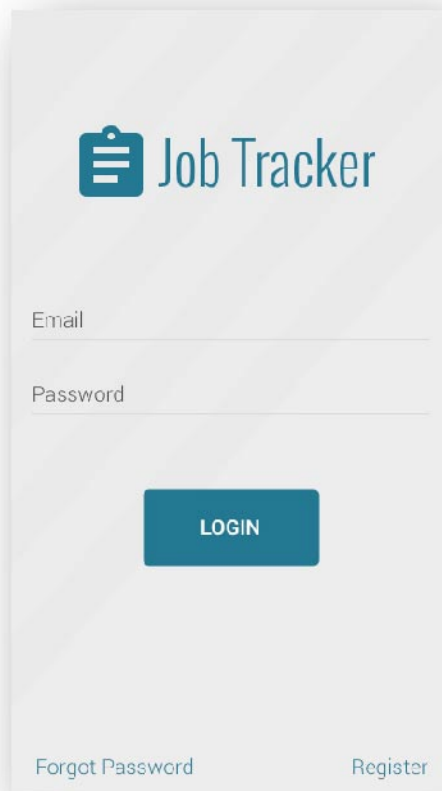
### Wrap up



- Returns to office.
- Hands the office staff any forms, notes, reorders or time sheets.



A simple concept was created to help technicians view their day, track and relay job details.



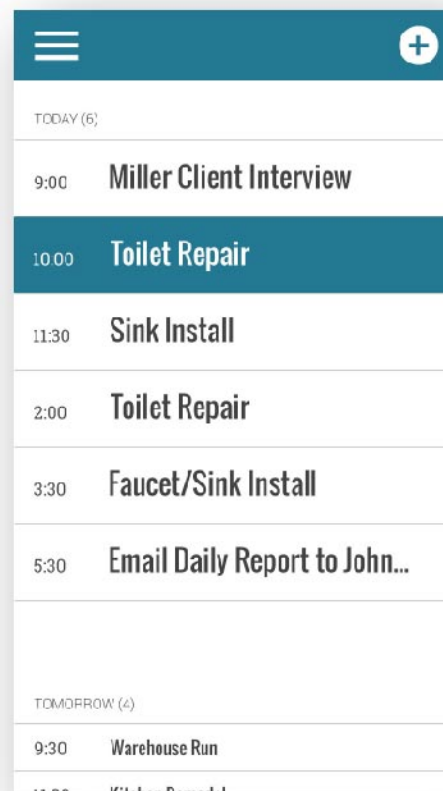
Job Tracker

Email

Password

**LOGIN**

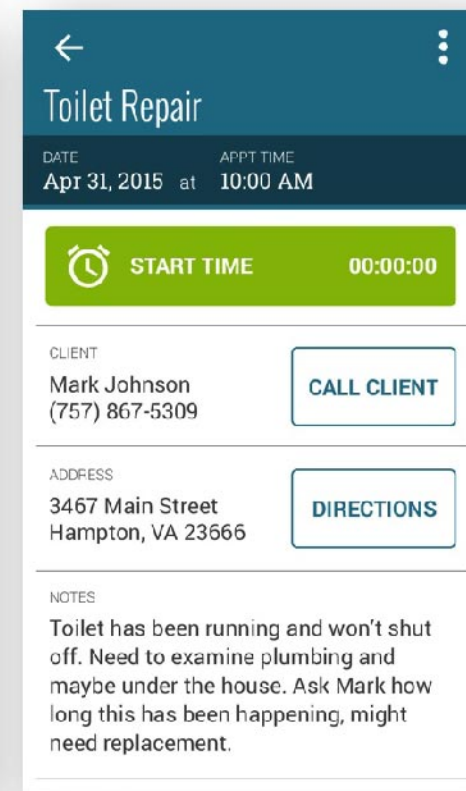
[Forgot Password](#) [Register](#)



TODAY (6)	
9:00	Miller Client Interview
10:00	Toilet Repair
11:30	Sink Install
2:00	Toilet Repair
3:30	Faucet/Sink Install
5:30	Email Daily Report to John...

TOMORROW (4)	
9:30	Warehouse Run
11:30	Kitchen Remodel



Toilet Repair

DATE: Apr 31, 2015 at APPT TIME: 10:00 AM

**START TIME** 00:00:00

CLIENT: Mark Johnson (757) 867-5309 **CALL CLIENT**

ADDRESS: 3467 Main Street Hampton, VA 23666 **DIRECTIONS**

NOTES: Toilet has been running and won't shut off. Need to examine plumbing and maybe under the house. Ask Mark how long this has been happening, might need replacement.

Provided a proof of concept to demonstrate the layout and core features of the Job Tracker application. This design was reflective of the initial customer insights and an assessment of the user needs. Because of the limited user types it was an easier buy-in process

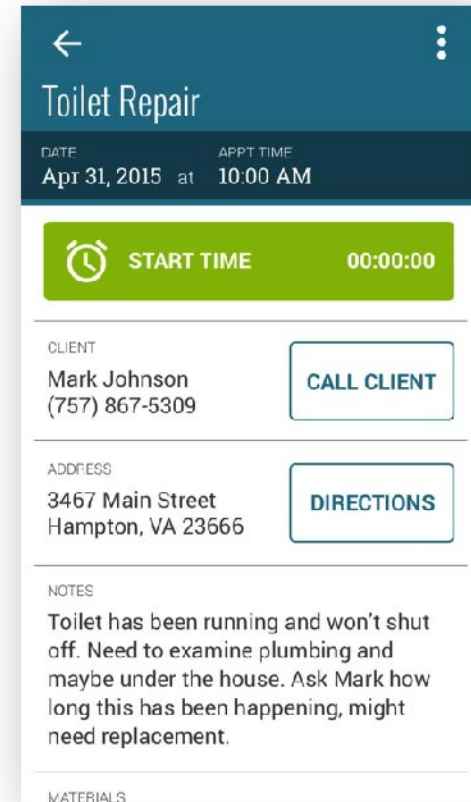
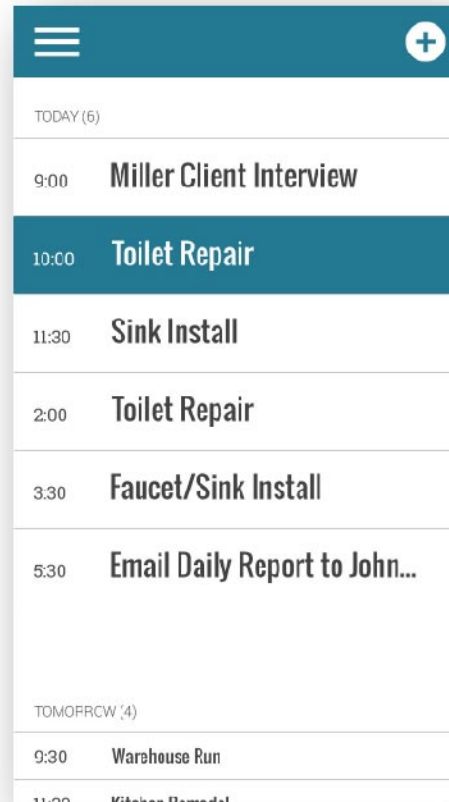
# JOB TRACKER APP



## Prep For Day



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- Reviews jobs for the day.
- Passes any information to office staff they missed turning in the night before.
- Replenishes truck with any items used the day prior.



# JOB TRACKER APP



## Working Jobs



- Travels to job sites.
- Tracks time and materials used at each job.
- Contacts customers and sales reps via mobile phone.
- Picks up any orders as needed throughout day.
- Completes jobs.

← Toile

DATE: Apr 31, 2015 at APPT TIME: 10:00 AM

🕒 START TIME 00:00:00

CLIENT: Mark Johnson (757) 867-5309 [CALL CLIENT](#)

ADDRESS: 3467 Main Street Hampton, VA 23666 [DIRECTIONS](#)

NOTES: Toilet has been running and won't shut off. Need to examine plumbing and maybe under the house. Ask Mark how long this has been happening, might need replacement.

MATERIALS:

- 12ft pipe
- wrench
- electrical tape

LOCATION HISTORY: April 2015  
Toilet Replacement

← Toile

DATE: Apr 31, 2015 at APPT TIME: 10:00 AM

🕒 STOP TIME 00:24:37

CLIENT: Mark Johnson (757) 867-5309 [CALL CLIENT](#)

ADDRESS: 3467 Main Street Hampton, VA 23666 [DIRECTIONS](#)

NOTES: Toilet has been running and won't shut off. Need to examine plumbing and maybe under the house. Ask Mark how long this has been happening, might need replacement.

MATERIALS:

- 12ft pipe
- wrench
- electrical tape

LOCATION HISTORY: April 2015  
Toilet Replacement  
Faucet Installation

# JOB TRACKER APP



## Wrap up for day



- Returns to office.
- Hands the office staff any forms, notes, reorders or time sheets.

**Toilet Repair**

DATE: Apr 31, 2015    APPT TIME: 10:00 AM    TIME CLOCKED: 00:47:32

*This appointment occurs in the past*

CLIENT: Mark Johnson (757) 867-5309    **CALL CLIENT**

ADDRESS: 3467 Main Street Hampton, VA 23666    **DIRECTIONS**

NOTES: Toilet has been running and won't shut off. Need to examine plumbing and maybe under the house. Ask Mark how long this has been happening, might need replacement.

MATERIALS:

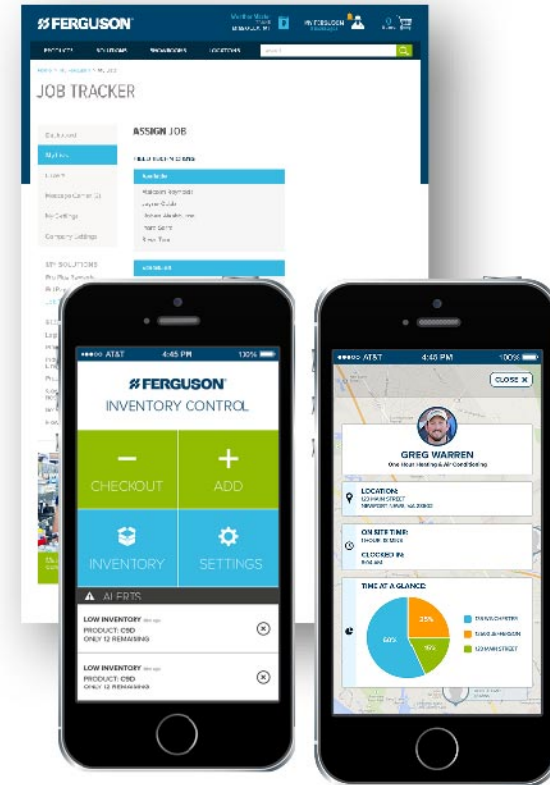
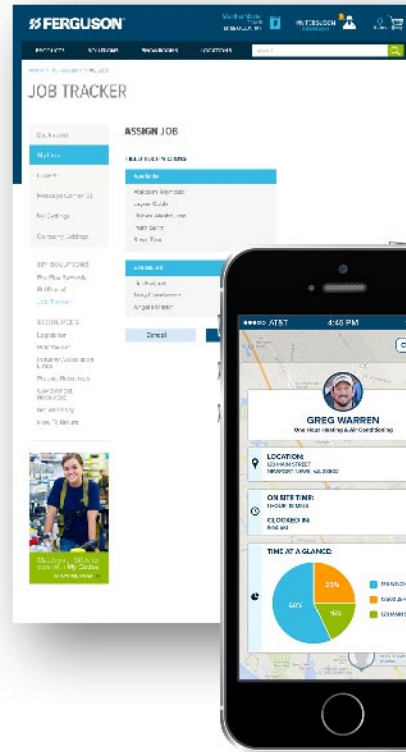
- 12ft pipe
- wrench
- electrical tape

LOCATION HISTORY:

- April 2015
- Toilet Replacement
- Faucet Installation



# JOB TRACKER PHASES



PHASE 1: Job Tracker App  
! Track jobs, time and materials.  
! Generates lists for home office

PHASE 2: Job Tracker App and Dispatch Web App  
! Connect to an admin/dispatch  
! Easy FOL Reorders/  
Replenishment of materials.

PHASE 3: Job Tracker App, Dispatch Web App  
! Allow for connections to other apps in Ferguson library.