TEAM Software
by WORKWAVE®

DATA AND REPORTING:

Making Businesses More Performance-Driven

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EXECUTIVE SUMMARY

The field service industries are changing.

Companies, particularly those in commercial and residential cleaning and physical security markets, are experiencing growing demands from clients, which is impacting how services are delivered – and how to prove those services were delivered.

Combined with ever-changing market forecasts and potentially thinning profit margins – impacted in part by a fluctuating labor market – companies are under more pressure to maximize resources and gain efficiencies wherever possible.

That's where a data-driven approach can deliver.

In this resource, TEAM Software by WorkWave outlines several ways to use data and reporting to the advantage of your company. Take note of examples of different reports that can add immediate value to your bottom-line as you dive into your data-driven journey.

TEAM Software by WorkWave is the developer of market-leading software specific to the needs of field service industries, including cleaning, security and facilities management sectors. We understand the importance of data-decision making in these industries because we've been there. We started out as a provider in these industries, and when we couldn't find a software to meet our back-office, financial and operations needs – we built one. Since then, we've helped countless companies improve their profitability and gain efficiencies through technology driven processes – including data analytics and reporting.

READ OUR SUCCESS STORIES

Saving $250,000 in 24 hours

Providing better reporting through an integrated approach

Improving reporting and reducing labor costs

01

The Growing Need for Data and Reporting

The U.S. market size for the cleaning and security industries increased substantially over the past ten years. In the security industry, the market increased by **approximately 10 billion USD** between 2011 and 2022, and the market size of cleaning services in America rose significantly during the same decade by **approximately 40 billion USD.**

These large and relatively consistent increases in market size in both industries could entice more competitors to move into the cleaning and security industries. If that happens, established companies could have to work harder to win bids and retain customers.

Alongside increased competition, companies are experiencing a rise in client demands, especially in regards to **proof of service** and **guard monitoring**.

There are many possible reasons for this:

1 The repercussions of COVID-19 heightened the expectation of higher standards of quality assurance, especially with work orders involving high-sanitation cleaning and security protocols around visitor screening.

2 Economic factors have forced clients to take a hard look at their own bottom line. As companies evaluate possible expenses to cut, they want to know that the services they're contracting your company for are being upheld to the specifications of your SLAs – and that the quality of those services can't be found elsewhere for a lower price.

3 As compliance regulations become more stringent in the field services industries, companies are seeking cleaning and security contracts that can support regulatory needs while minimizing compliance risk. They are demanding 360-degree visibility into their contracts performance, service history and reporting, and they need cleaning and security partners who are able to deliver this knowledge to them in a seamless and automated way.

Because of these growing demands, cleaning and security companies should strongly consider **data and reporting solutions that support both of those needs.**

Proof of service and employee monitoring

Improving proof of service procedures can have a number of immediate benefits. For instance, in the event of an audit, a hospital needs to demonstrate their adherence to required cleaning standards for infection prevention and control. Non-compliance with any standards could result in serious health risks for patients, as well as fines and penalties for the hospital. However, adequate proof of service can show the processes taken, timelines, equipment used and more.

With regards to the security industry, many companies are required to prove they're effectively protecting assets at a contract location. By implementing guard monitoring, a company is protected against liability, which proves that guards performed their activities and responded as expected. Guard monitoring also helps establish a timeline of events, validate security measures and identify areas of security that need to be improved.

02

Establishing Data Processes and Benchmarks

There's a popular phrase that goes "garbage in, garbage out." That saying applies just as much to company data as any other use case. If you're operating from inaccurate or inconsistent data, it won't provide you with any meaningful or actionable next steps. That's why it's so important to establish a process and framework for capturing meaningful data, instantly sharing it across all core departments and reducing error in its upkeep.

When it comes to data, there are two areas where most companies find themselves while trying to become data-driven:

1 Very little access to data – or unreliable information that fails to help with making strategic business decisions.

2 Too much data without a clear objective on how to maximize the potential of that information.

In both scenarios, the businesses aren't able to leverage data in any meaningful way. That's why the first step in making effective data-driven decisions is to know the specific goals that your company is trying to achieve.

Start by asking yourself these questions:

✓ What are your customer demands?

✓ What are other stakeholders (managers, field workers, board members and executives) asking for?

✓ What kind of information are you missing to make effective decisions? This can range from C-suite needs (i.e. understanding large data trends, such as contract profitability) to tactical day-to-day needs (i.e. knowing who is available to work an open shift, while still meeting compliance requirements) and everything in between.

Next, determine how you're collecting information. Do you have data that simply isn't in sync between different departments? Or, are you staring at empty excel spreadsheets? Better understanding the available resources (where the information comes from and how it's being used) can help prioritize reporting needs.

Finally, set your benchmarks. Understand the meaning behind the metrics.

For example, to set up a Pass / Fail audit report, you need to know what standards of work constitute a success, versus what would trigger a fail.

Here are a few sample questions to help establish data benchmarks:

✓ What type of reporting tools are you using, if any?

✓ Are you relying on paper documentation?

✓ Are your clients asking for insights into worker location by time on site?

✓ Do clients want a summary of activities completed? At what frequency?

✓ How many employees do you have in the field, on average?

✓ Is your company in compliance with post orders or standard operating procedures?

✓ How many of your sites are experiencing issues? Which sites?

✓ What are the most common types of issues?

✓ Which days do you have the most issues and what are they?

✓ How many employees do you have that are regularly underperforming?

✓ Would your company benefit from tiered reporting or job costing information?

03

Actionable Reports for Specific Business Objectives

If you're newer to data-driven strategies – and the software used to support them – you may be wondering where to start. The truth is there are countless ways to collect, manipulate and act on business information – and it can be difficult to know what to prioritize first.

We've rounded up some of the most sought-after areas of reporting from our customers.

In this section, we'll:

- Highlight why the report is needed

- Include a snapshot of what the sample report may look like

- Help you understand how it can transform data into meaningful – and actionable – business decisions
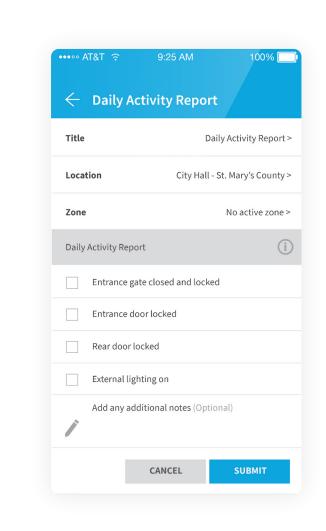
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Reporting to drive operations and business growth

WHAT IT IS:

This reporting tool can help with analyzing key performance metrics and identifying areas of improvement – it optimizes resources, tracks response times, monitors productivity and measures quality assessments.
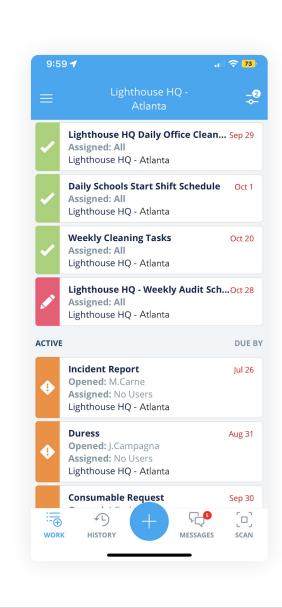
WHY IT MATTERS:

It identifies opportunities to streamline operations, reduce costs and allocate resources more effectively. For example, if a report is tracking overtime, a company can use it to investigate underlying causes and use that knowledge to better manage staffing levels and scheduling.

SAMPLE REPORTS:

DAILY ACTIVITY REPORTS ⊙
help companies:

- ✓ Better understand the time workers spend on or off the site
- ✓ Articulate shift change information with increased clarity
- ✓ Have a stored, digital record of all activity, including routine patrols
- ✓ Respond quicker to any unusual activity and escalate problems
- ✓ Reduce unforeseen overtime

SCHEDULING REPORTS ⊙
help companies:

- ✓ Keep track of exactly how many people are needed at each job site
- ✓ Compile information regarding qualifications on-site workers must meet
- ✓ Immediately confirm the qualifications of workers applying for open shifts
- ✓ Denote if a worker has taken on too many hours to minimize overtime pay
- ✓ Acknowledge high risk job sites for safety precautions
- ✓ Share information on how many workers versus supervisors must be on site

PRO TIP

Selecting a specific shift type can help make your scheduling and reporting more effective.

HERE ARE SOME EXAMPLES:

Fixed shift
Know the start and finish time of each employee and where they logged on.

Flexible shift
Create a specific time window for an employee to complete their work. Get a notification when the work is done, or escalate the issue if there is a problem.

Fill open posts
Efficiently fill open shifts manually or automatically pull data suggesting the most suitable employees to fill open posts.

Auto create
Proactively monitor exceptions needing attention by viewing an automated report detailing which tasks or jobs need attention.
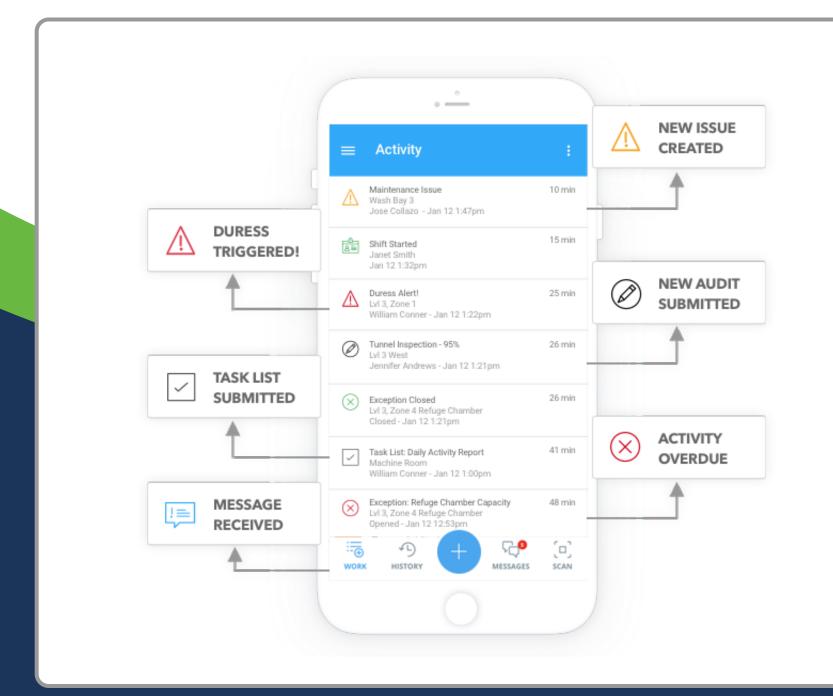
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Exception-based reporting

WHAT IT IS:

It highlights outliers in reported data, so you can better identify red flags. Automatically review service delivery data for missed items or incomplete tasks. Or, receive and review reports based on exceptions to jobs being performed.

WHY IT MATTERS:

It quickly resolves issues and continues to provide satisfactory services by recognizing outliers. It helps you better focus on specific issues that are relevant to your business, while helping prevent error and protect profits against loss.

SAMPLE REPORTS:

EXCEPTION-BASED ▸
reports help companies:

- ✔ Shed light on actions that require immediate attention, as the most important task will surface at the top of the dashboard screen

- ✔ Identify individuals who fail to clock into their shift that day, so that information can be escalated quickly and efficiently

- ✔ Manage payment exceptions by providing data to make decisions on what to pay and what to bill separately

- ✔ Create unique, high-level views featuring insights that are most valuable to your company through specific reports and usable data

- ✔ Focus on common issues (i.e. scheduling, payroll, financial, human resources, inspection and supply chain needs)

3

Fraud prevention

WHAT IT IS:

Time theft happens when employees round up their clock-out time, clock in or out for another, take extended breaks, socialize while on the clock or take unscheduled stops while performing a route.

WHY IT MATTERS:

Losses from time theft come in the form of work avoidance or fraudulent time tracking, which wastes money. Being more conscious of time theft ensures that staffers complete their entire shifts, and your company can avoid losing money to unnecessary overtime pay.
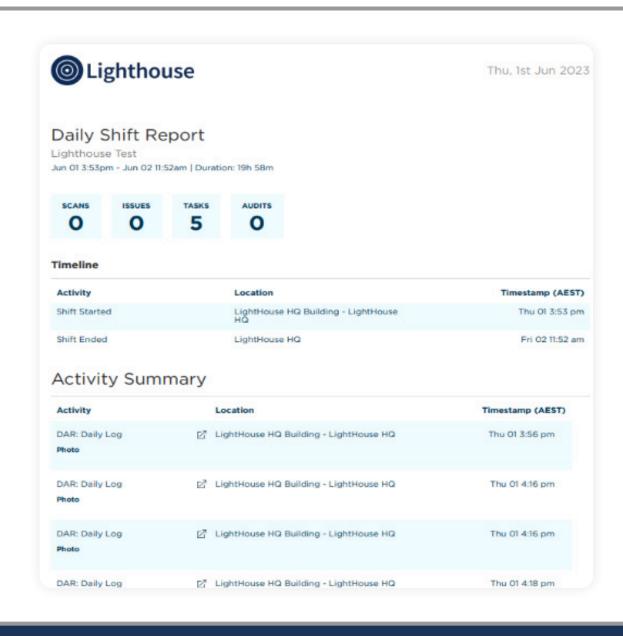
Read how one company caught

$1M IN TIME THEFT

-- and how they stopped it:

Advantage Maintenance >

SAMPLE REPORTS:

ACTIVITY REPORTS ⊙

helps companies optimize time and attendance tracking by:

- ✓ Optimizing back-office functions
- ✓ Automating manual processes for increased accuracy
- ✓ Lowering the risk of compliance issues
- ✓ Supporting regulatory requirements (i.e. meal and rest breaks)

04

Resolving issues and incidents

In recent years, data-driven software has become paramount to incident response, because it provides resources that help with record keeping and sharing information. Those two factors are key when it comes to investigating incidents and responding decisively.
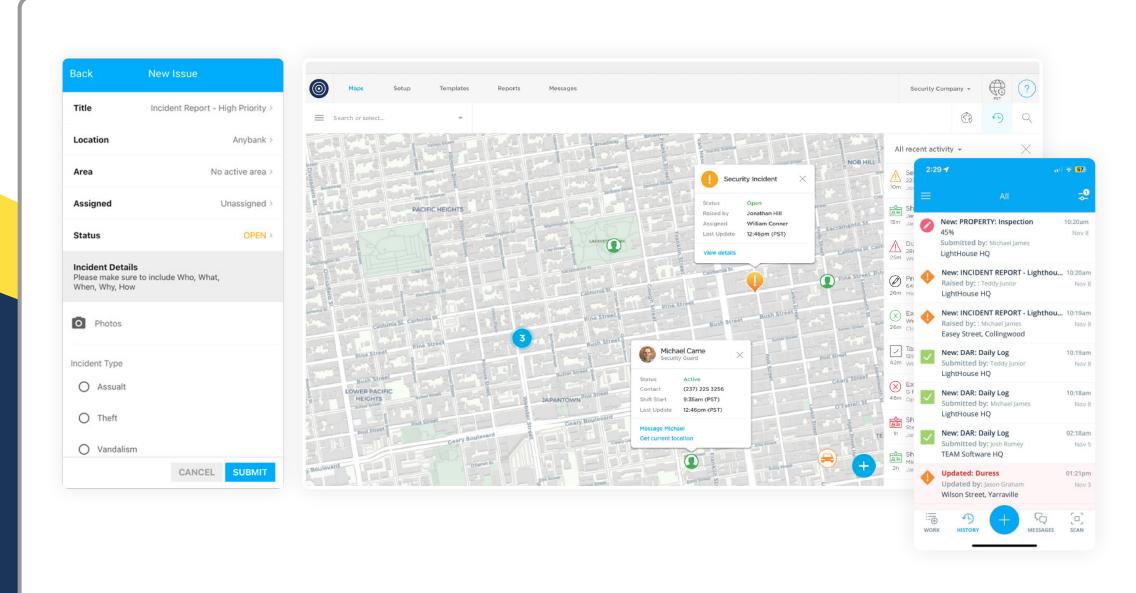
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Incident reporting

WHAT IT IS:

Incidents can cause harm to workers and the public. Slip and fall issues, for example, can lead to costly liability risk for your company, while incidents at security contracts can pose a risk to public safety.

WHY IT MATTERS:

It's important to mitigate issues and incidents whenever possible. When they are outside of your control, however, it's even more important to be able to resolve them quickly, ensuring client satisfaction and public safety. Reporting tools can provide a holistic view of the operations and activities on a site, even triggering alerts and protocols to support quicker resolution.

SAMPLE REPORTS:

INCIDENT REPORTS ▶

help companies keep better track of staff by:

- ✔ Tracking where staffers are on a map
- ✔ Determining the best and the closest staffer to respond to an issue
- ✔ Providing evidence against slip and fall claims to increase safety
- ✔ Increasing awareness at security checkpoints by making sure key zones are serviced
- ✔ Setting up loop times to automatically monitor the time since the last service was performed

05

Understanding Profitability

Leveraging data to make decisions with the best available information is more than just a good business practice – it's an absolute necessity for any company attempting to succeed in today's competitive economy.
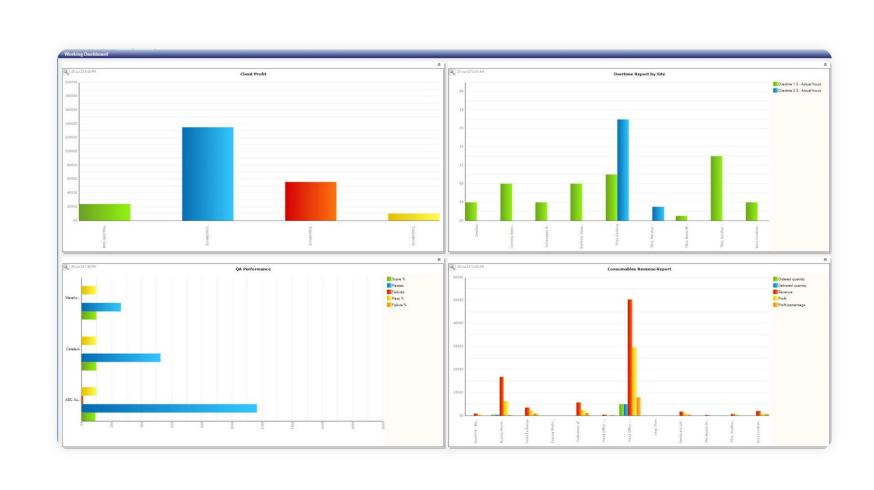
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Job costing

WHAT IT IS:

Data and reporting tools can report accurate information associated with job costs. Some of the more common costs that should be allocated for each job include labor costs, payroll taxes, workers compensation, general liability insurance, umbrella insurance, supplies, materials, fuel and vehicles. Performing job costing is also key for budgeting and understanding profitability.

WHY IT MATTERS:

Complete visibility into the profitable aspects of a job helps facility management professionals better understand the true profitability of a job. Depending on the type of software you use, this can even attribute indirect costs down to the job level (including labor costs and true overhead expenses).
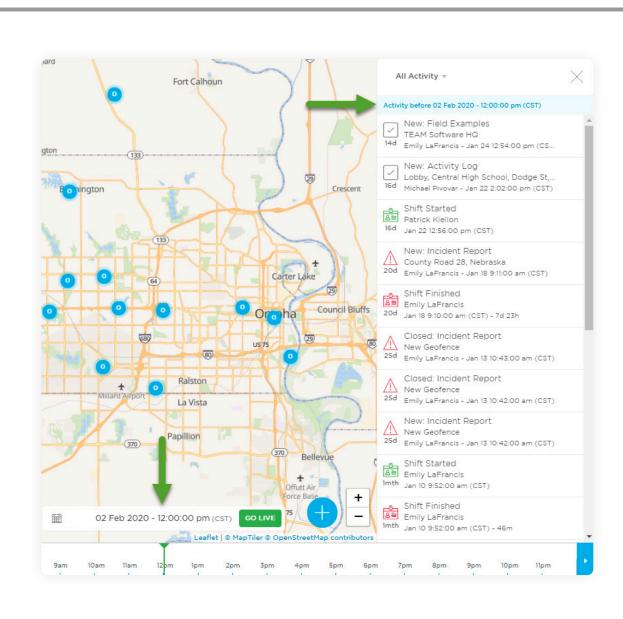
SAMPLE REPORTS:

PROFIT AND LOSS REPORTS ⊘
help companies understand profitability by:

- ✔ Tracking costs and revenue associated with individual projects or jobs
- ✔ Enabling standardized reporting of profitability by job
- ✔ Ensuring that a business is cost-effective
- ✔ Producing metrics that can be used to lower expenses
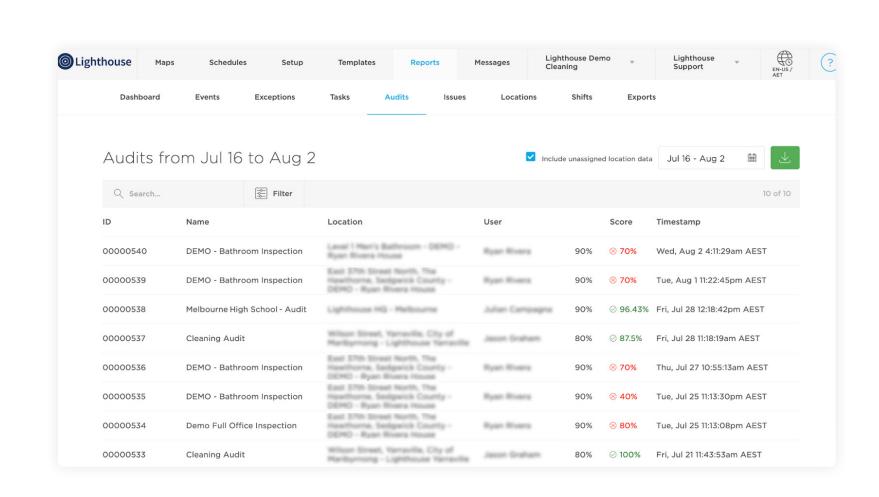
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Building Customer Satisfaction

Customized dashboards are particularly useful when attempting to review data and take advantage of reporting features within software designed for cleaning and security professionals. Discover the ways that these dashboards can help build customer satisfaction through customizable features.

SAMPLE REPORTS:

DAILY ACTIVITY REPORTS

Daily activity reports are a useful tool for better understanding which activities were performed on a job site within the last 24 hours. Cleaning and security professionals are able to keep track of events, tasks and checklists with increased efficiency. Managerial level staffers can also use that information to confirm the duties completed by workers.

Share these reports, which can be sent automatically, with clients who wish to better understand proof of services. Then drive additional requests for future business by acknowledging gaps in the reports that identify work, which wasn't previously outlined in the original contract.

SAMPLE REPORTS:

AUDIT REPORTING

Whenever it's necessary to take a deep dive into inspection related tasks, audit reporting serves as an investigative tool for tracking quality of service. Use it to measure quantitative data against necessary client inspections, and highlight areas that can be improved in the process.

Audit reporting can also be used jointly with a customer to help that client get a first-hand view of the cleaning services provided by your company - based on a pass or fail grade-like system.

SAMPLE REPORTS:

KPI REPORTING

Tracking your progress against KPIs is made easier with this dashboard. KPI reporting offers a visual summary against KPIs within the client contract. Over time, this hard data provides the critical information in terms of recognizing trends and preparing for future contracts.
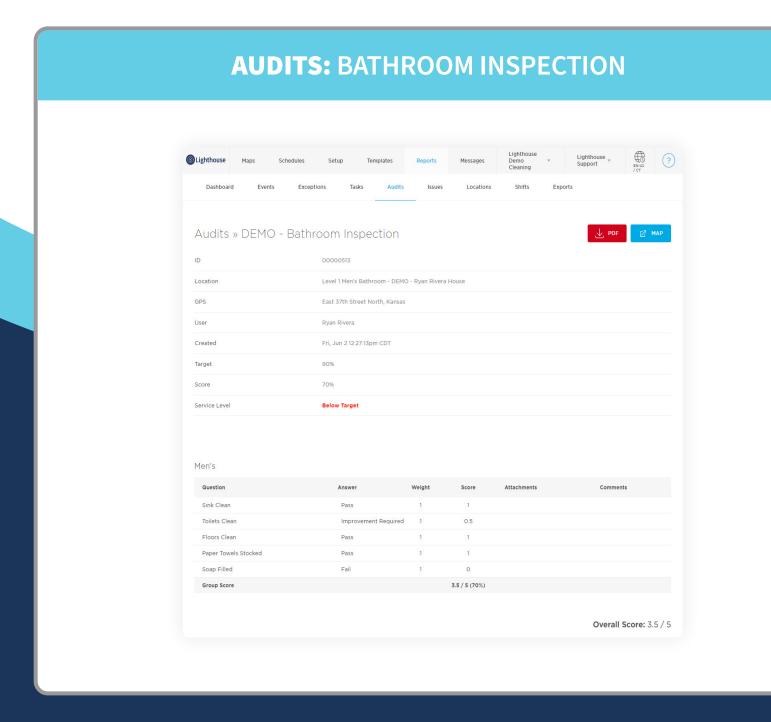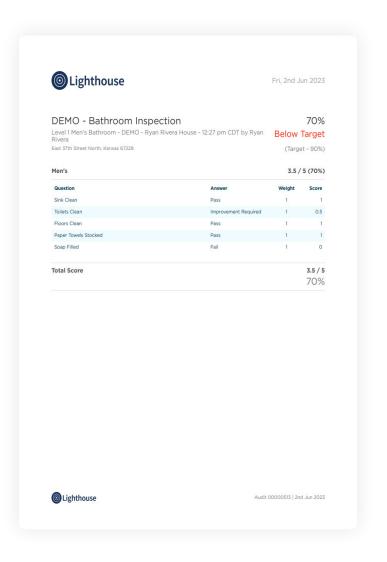
07

Using Data and Reporting to Win Business

Cleaning and security professionals have to work hard to earn bids. Today's economic landscape facilitates competition amongst businesses. Customers are also compelled to seek out top business, due to government regulations. Additionally, there's been a spike in demand in both industries within the country.

All of these factors boil down to the fact that success takes an extra edge – the kind that data and reporting tools provide. Use data and reporting to make wiser business decisions, tighten workflows, gain productivity, become more efficient, increase safety measures, and deliver added value.

Include samples of your reporting capabilities in your bids for new contracts. Being able to demonstrate the scope of your data collection -- and the information you're able to provide to your client because of it -- can mean the difference between a contract won or lost.

SAMPLE REPORTS:

AUDITS: BATHROOM INSPECTION

AUTOMATICALLY GENERATED REPORT: BATHROOM INSPECTION

CONCLUSION

The field service industries are changing.

Becoming a data-driven organization is not an overnight process, and this guide is not all-inclusive. Every company is different. That means your reporting needs may vary, even from direct competitors in your industry.

The experts at TEAM Software by WorkWave are here to help with each unique business case. To start implementing data-driven processes, learn more about any of the sample reports provided in this resource, or to discuss custom reporting needs, contact TEAM Software by WorkWave today.

NOTE: TEAM Software by WorkWave reporting capabilities vary by product. If you are interested in learning more about any particular reporting functionality in this guide, please reach out for a demo.

About TEAM Software by WorkWave

TEAM Software by WorkWave develops market-leading solutions for companies powered by distributed workforces, specifically those serving the cleaning, security and facility management sectors. TEAM's technology enables companies to manage and optimize their business, from front-line service delivery to back-office financial management, by providing business-critical information to reduce risk and costs while driving efficiency, profitability and growth. Established in 1989, customers count on TEAM's proven industry expertise, scalable world-class software solutions and exceptional customer experience. For more information, visit teamsoftware.com.

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