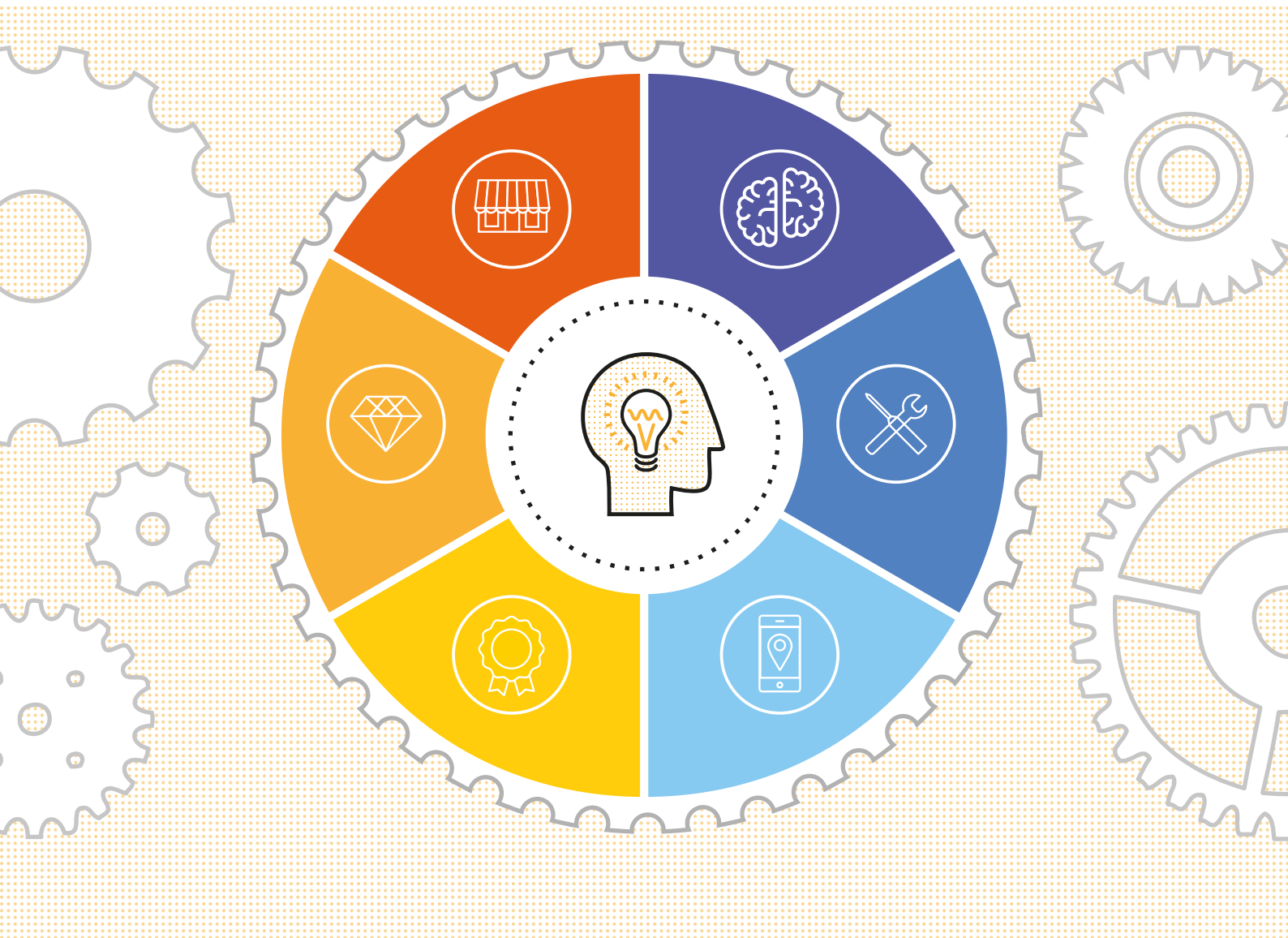


# OPERATIONAL EXCELLENCE



## Location-Based Operations



## Executive Summary

Consumer services providers know that the field of location-based operations is rapidly changing. In this white paper, we'll discuss how the services industry is ditching the dogma of training manuals and teaching something more practical. In fact, they're building well-oiled operational machines by adopting mobile data collection technology that helps identify teachable moments and drive the continuous improvement of employee and location performance.

## Introduction

In the television show *MasterChef*, bombastic celebrity culinarian Gordon Ramsay routinely rails against his contestants' dishes. "It's raw," he might say, "It's overcooked, it's simply not special." Yet, in the kid-focused version *MasterChef Junior*, Ramsay can be seen coaxing adolescent competitors out of their youthful shells and into their own talents.

At the end of an episode of *MasterChef Junior*, some of the boys and girls will say a tearful goodbye. However, throughout the experience, they'll have learned incredible lessons about both the cooking process and approaching tough tasks with confidence. It's a perfect example of how many businesses ought to treat their up-and-coming employees - especially in consumer services.

We should all take a page from that chapter of the Gordon Ramsay playbook: search for teachable moments.



# THE OPERATIONAL EXCELLENCE MACHINE

Whether you're tax preparation group, a dog grooming company, or a financial consulting service, chances are you probably have operational excellence or "OPEX" at the top of your to-do list. But you know you can't just go out and buy it. You have to assemble it, nurture it. You have to create an efficient machine, one that's focused on achieving and maintaining brand, customer experience, behavior, and training proficiency while driving continuous improvement.

Operational excellence is actually quite similar to a machine, complete with gears, pulleys, and levers that power industry-leading performance. The only difference is that this machine is fueled by data, propelled by continuous improvement, and powered by the cogs of employee proficiency, performance, and responsiveness.

## KNOWLEDGE

Do employees know what to do at all times?

## PERFORMANCE

Are they doing their job well?

## RESPONSIVENESS

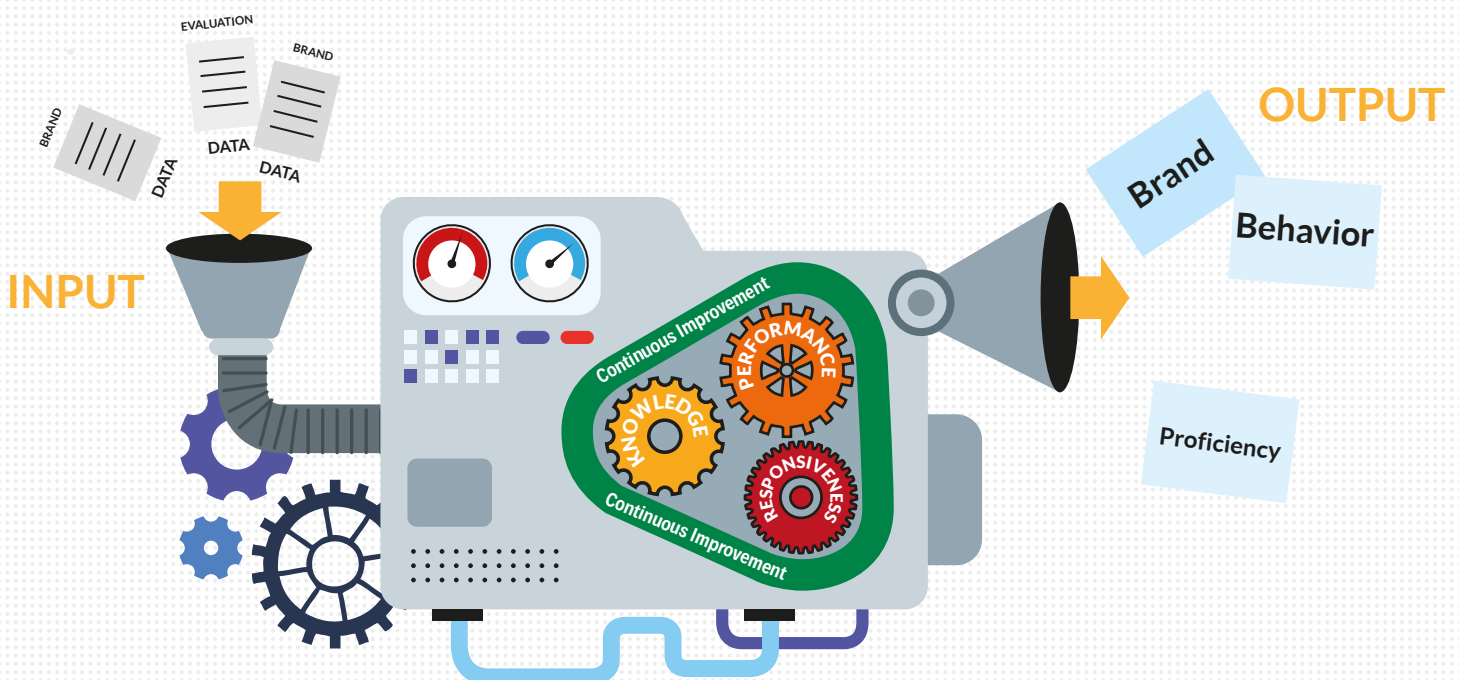
How quickly can issues be remediated?

Let's take a closer look at the "cogs" of the OPEX machine to get a better idea of how the gears work, and how mobile technology can enable peak performance.



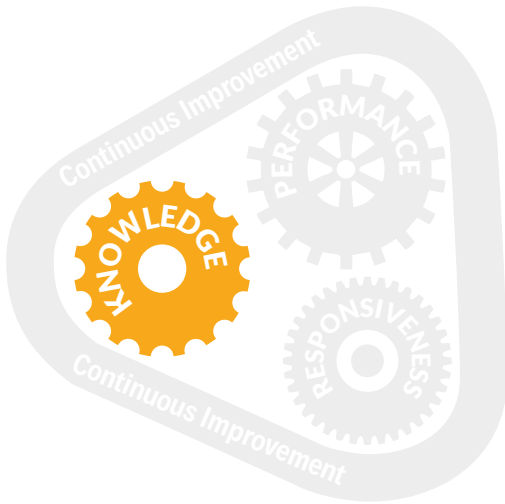
### What is Operational Excellence?

At Form.com, we define operational excellence as the ability to meet rigorous brand, customer experience, and safety standards by driving continuous improvement in employee **knowledge, performance, and responsiveness.**



# THE COGS OF YOUR MACHINE

## Knowledge, Performance, Responsiveness



## Knowledge

### Do employees know what to do at all times?

These days, it's more critical than ever that each employee understands the proper procedures and standards for their daily operations. Services companies need top-notch onboarding to ensure their employees offer a world-class customer experience and the ability to measure the employees' knowledge at intervals throughout their tenure.



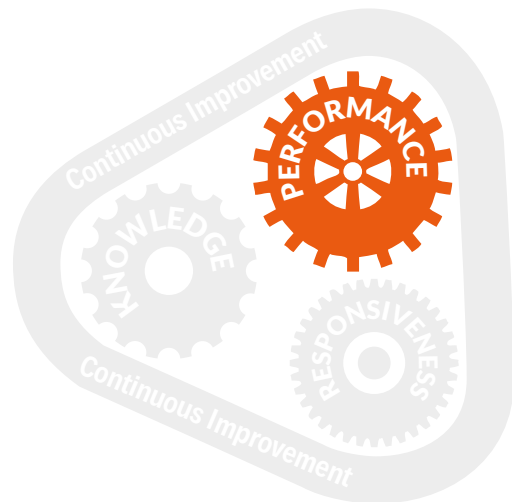
### How mobile technology and software can help

*In addition to serving as a hub for training documents and materials, the right mobile software will let you integrate, compare, and cross-reference training metrics (from employees and trainers) directly back to performance, audit, and client feedback.*

## Performance

### Are they doing their job well?

Employee performance may be the most critical cog in the OPEX machine. After all, you're not going to get the output you need if employees aren't performing at the right level. The key to optimizing performance is to help employees apply the proficiency they've gained in a way that helps them continuously improve.



### How mobile technology and software can help

*By habitually performing internal evaluations, inspections, and walkthroughs with data collection software, you can gather a steady stream of information. As data accumulates, you'll spot trends and opportunities to improve training and tweak procedures.*



## Responsiveness

### How quickly can issues get remediated?

A significant component of operational excellence is the ability to quickly course correct when issues arise. For instance, imagine a visit to a tax preparation service reveals that employees are offering a promotion after it has ended, such as a refund advance loan.



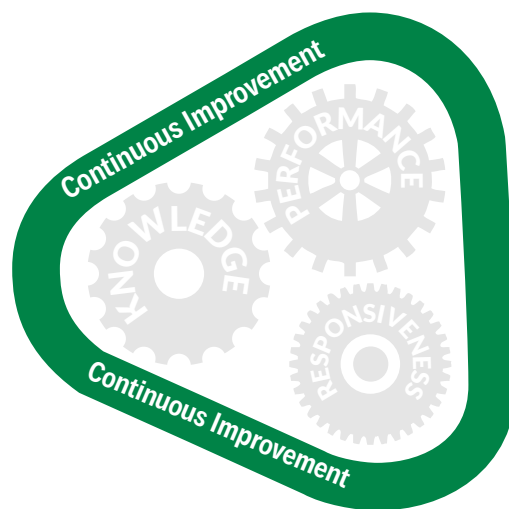
#### How mobile technology and software can help

The right mobile software will have corrective and preventive actions (CAPA) integrated into your solution, allowing boots on the ground to know how to correct the issues they encounter. Mobile software can help you gather evidence to diagnose and confirm the issue at hand.

## Continuous Improvement

### That which gets measured, improves

Continuous Improvement (CI) is the drive chain that transmits mechanical power from gear to gear in the OPEX machine. If conducted properly, a CI program will keep all the gears turning and working towards an output of brand, customer experience, and training comprehension.



At Form.com, we define **Continuous Improvement** as a data-driven approach to incrementally tweaking and improving services and processes to maintain operational excellence while meeting the ever-changing demands of today's consumers.



#### How mobile technology and software can help

The core principle of continuous improvement is data-based decision making. Mobile training, evaluations, and audits generate a TON of data, and software distills it into digestible graphs and charts. When you take the time to analyze your data, you'll gain a better understanding of whether things are improving or getting worse over time.

# THE OUTPUT

## Brand, Behavior, and Proficiency



### Brand. Behavior. Proficiency.

These are what we strive to deliver with our OPEX machine. These are all critical client-facing matters. Should anything go wrong there, the end result could be devastating to the entire service.

#### Brand Compliance

Brand consistency, through things like location appearance, processes, and look-and-feel, can strengthen a brand's ability to differentiate itself from competitors while lending credibility to your whole business.

Like operational excellence, brand consistency is easier said than done. Brand audits usually trickle in slowly and aren't tied to the rest of your system. This disconnect can make it especially challenging to get ahead of potential problems.



**How mobile technology and software can help**

*With the right mobile platform, services can tie data collected from brand evaluations directly back to performance, customer experience, and training metrics to determine the impact that brand consistency can have on the bottom line.*

*A customized mobile platform can also serve as a service's system of record for distributing brand updates, educating your internal teams on your brand promise, and maximizing your brand vision.*

## Employee Behavior

Employee behavior is a significant factor in client satisfaction and a prerequisite for best-in-class consumer experience. But established procedures and processes don't guarantee individual performance.

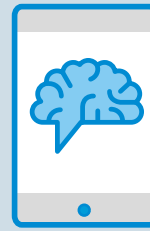
Without ongoing evaluations, behavior cannot be measured proactively. And if there's ever a compliance problem at one of your locations, it's always better to discover it yourself rather than hear it from an angry client on social media.



## Training Proficiency

Training risks seem to lurk around every corner of the service business. There's the risk that an employee performs so poorly that it turns a client off to your business forever. There are also the "invisible" risks: the potential for being fined, sued, or maligned in the media if scandal arises.

Many locations with distributed operations still manage training processes with paper, spreadsheets, or homegrown solutions. But time is of the essence when it comes to training brand representatives, and you need to prevent problems from recurring. Paper, spreadsheets, and carrier pigeons just aren't going to cut it.



### How mobile technology and software can help

*Mobile technology and software can help companies quantify employee behavior by measuring user satisfaction and process effectiveness against location and worker performance.*

*Mobile apps can also accelerate employee evaluations and audits by pre-populating data fields, automating tasks and notifications, and informing management of any issues.*



### How mobile technology and software can help

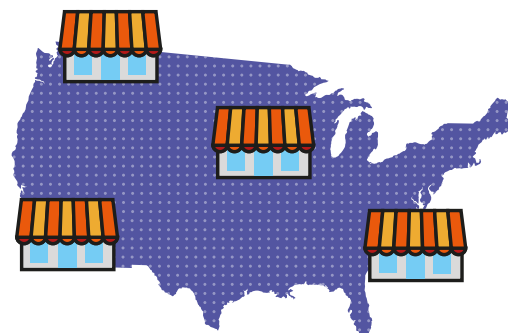
*Ultimately, the right software can mean the difference between a filing cabinet filled with useless inspection documents and a training-focused system based on continuous improvement.*

*With mobile technology, you can see employee trends and client feedback while improving training with automatic triggers to kick off time-sensitive coaching sessions.*

# The 7 steps to Operational Excellence and Continuous Improvement

## 1 Establish a baseline for employee performance

With a mobile data collection platform pulling data from disparate systems, companies can gain an understanding of how compliant a location is compared to your brand, behavioral, and training standards. This information can be reviewed and analyzed on a local and global level and used for future learning moments and strategic decisions.

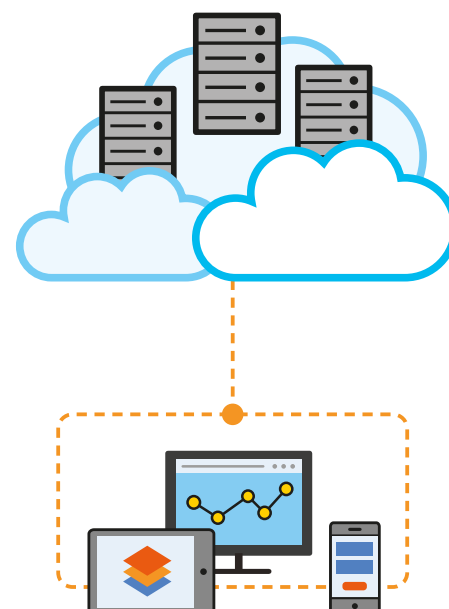


## 2 Streamline data collection and see all your data on one platform

You need to be continuously improving at all levels, which can be difficult to pull off when you're responsible for everything from training and compliance to brand management and client experience. What's the point in collecting all this if each type of data remains isolated from the rest? With flexible software, you can see all your data in one place to enable data-driven decisions and streamline inspections or audits.

## 3 Leverage data analytics to make more informed decisions

A data analytics program can uncover patterns and help you draw conclusions. With the right system in place, you can get a closer look at the data, and brainstorm ideas for advancement before even visiting the location. You can even compare data captured from one location to other locations worldwide to investigate trends and identify opportunities for improvement or preventive actions.



## 4 Improve communication to keep everyone on the same page

Spreading a consistent message can be tough. Poor communication can be especially damaging when rolling out a promotional offer with complicated instructions and a limited window of operation. Maintaining open communication through mobile technology ensures that every location is always on the same page as the HQ.

## 5 Optimize processes with data-driven trend analysis and decisions

Companies focused on process improvement consistently analyze, improve, and refine their procedures regardless of scale. By using trends spotted in data analysis to inform the decision-making process, companies can ensure each outlet delivers quality experiences.



## 6 Align your workforce with the company's vision to drive continuous improvement

The key to driving change is system-wide acceptance of your initiatives. To get there, you need input from all levels and collaboration across all channels. Clearly communicating your organization's goal will empower employees and help them adapt when policies change.

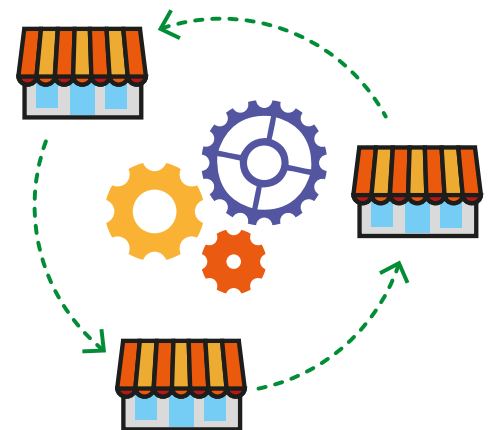
## 7 Develop a success methodology to ensure all cogs are spinning

When setting your benchmarks, remember to consider both internal and external factors.

For example:

**External Benchmark:** Are you meeting or exceeding the growth rate of your competitors? Can you keep it up long enough to gain a competitive advantage?

**Internal Benchmark:** How much value has been captured from driving operational improvements?



# A Few Parting Words

As satisfying as it may seem on TV, consumer services leaders can't gain insight into their organizations by merely shouting down their staff like Gordon Ramsay on MasterChef. We know that there are better ways to spark continuous improvement and find teachable moments.

Mobile technology and data analytics can rapidly turn an incongruent service system into a well-oiled machine driven by continuous improvement and a dedication to operational excellence. This OPEX machine delivers brand, behavioral, and training consistency by providing operational leaders with the ability to see how each location is performing and to dig deeper to determine if employees:

- Understand the procedures and standards they should follow
- Perform against those standards

And whether your organization is:

- Continuously measuring the effectiveness of training
- Quickly remediating known issues
- Making smart, data-driven decisions

Form.com clients use our platform on thousands of mobile devices, gathering and analyzing data every day. They're automating tasks, notifications, and workflows to quickly find and fix problems at individual locations while understanding whether these local issues are trending regionally and globally. And, most importantly, clients are taking notice.

## Got questions? We can help!

Form.com is a flexible platform designed to take time-consuming procedures done on paper and spreadsheets and turn them into user-friendly forms. Our mobile and offline app allows you to access and complete forms from anywhere, even while offline, and our team of experts will work with you every step of the way to create your ideal solution.

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**For more information**

Call **1-888-708-8118**

or email [info@worldapp.com](mailto:info@worldapp.com)