How National Metering Digitally Transformed Their Utility Service Operations with Field Squared

National Metering & Technical Services, LLC, headquartered in Washington state, is a leading resource of journeymen metermen, meter technicians, and revenue recovery specialists contract personnel. Having a solid history spanning over 20 years serving the utility services industry, the company maintains an impressive and extensive background across electrical revenue meter wiring, meter and safety training and troubleshooting; power quality and power theft detection; and meter service audits, testing and consulting.

The Challenge
A mobile field workforce still using paper-based processes

In the utility services space, maintaining a highly distributed, mobile field workforce comes with the territory. The ability to complete work orders on time from the field, effectively capture field data—including photos, barcodes and GPS coordinates—and provide an exceptionally positive customer experience, is a huge deal.

"With paper-based processes, it was difficult to get our field technicians to complete their tasks in a timely manner. That was further compounded by our inability to get all the information back to the office and into the Utility database," said Autumn Potter, Operations Manager at National Metering & Technical Services. "The real problem was having a mobile workforce that rarely came to our physical office. Many of our employees work in other states and out of other offices. For me to assign them jobs, was a massive challenge," she continued.

Like many field service organizations, National Metering first started managing work orders, scheduling, mapping and capturing field data via manual, paper-based processes. The concept of tracking field worker activity was non-existent. Eventually, they purchased tablets and leveraged forms they built in Microsoft Access. It proved to work well for a time, but they were still spending significant manual hours that made it too cumbersome to continue using such methods.

Success Story Highlights

COMPANY
National Metering & Technical Services, LLC

INDUSTRY
Power & Utilities

INTEGRATIONS
Dropbox

CHALLENGE
Lack of visibility across entire field service operations

Ineffective field workforce mobility

No field data capture solutions, such as photo and barcode capture

Inability to assign jobs in real-time

SOLUTION
Key Field Squared Capabilities:
- Field Workforce Mobility
- Field Data Capture with Photos and Barcode Scanning
- Technician Tracking via GPS
- Scheduling & Route Optimization

RESULTS
Increased confidence from National Metering customers

Field Squared as the source of record drives enhanced operational efficiency

Unified platform enables a small team to support a highly distributed mobile field workforce

"For record keeping and backup purposes, we had to manually track pictures and try to match them to the associated work order. Everything had to be completed in advance, which meant we either had to mail the materials or even hand-deliver them to the technicians. It was massively inefficient," recalls Potter.

Overall, National Metering's methods of managing work orders was hindering the ability to visualize their entire field service operations. They needed a way to enable effective field workforce mobility, provide field data capture solutions and be able to assign jobs in real-time. National Metering needed a complete field service management platform to automate their business processes.

The Solution
End-to-end field service management process automation

"Before Field Squared, we were uploading all electric meter locations from the Utility into a GPS system and then printing out paper maps for the technicians. It was a way to minimize field time for technicians trying to search for work order locations, since not every Utility can provide GPS coordinates of their meter services. It was a lot of work," said Potter. "With Field Squared, we cut down on back-end work order preparation by at least 50%."

Field Squared offered National Metering incomparable capabilities to cover their full, end-to-end field service management needs. Seeking a truly mobile solution, including a proprietary mapping engine with native GIS, work order management, GPS tracking of field technicians and the ability to update and assign jobs in real-time, National Metering found no other solution that provided the depth and breadth of Field Squared, with the flexibility they needed and within a price range that was affordable.

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> **Autumn Potter,** Operations Manager at National Metering

"We evaluated other solutions, but they didn't offer the configurability of the Field Squared platform. With other vendors, it was 'here's what you get and make it work,' that wasn't going to work for me," recalls Potter. "Some didn't have the picture/photo capture or barcode scanning features that we required. Not all meters, but about 75% have barcodes, which is another validation for us to be able to scan the barcode without the manual input from each field technician. The amount of time we saved just by doing this little task, while at the same time decreasing the chance of operator input error, was a huge benefit of using Field Squared."

What made a difference with Field Squared was the ability to configure the platform to National Metering's needs. "A few of the other solutions we evaluated didn't allow you to configure your own work order forms to our specific requirements. It's essential for us to have the ability to customize our forms to what the Utility wants. The configurability and flexibility of Field Squared is great for us because it allows us to give our customers what they want," remarked Potter. "We have a different form for a specific job, such as meter audits, meter exchanges, meter data collection, and so on. Other solutions would not allow us to tailor our forms to meet the specific needs of each Utility unless we paid for all those changes. By utilizing the feature-rich Field Squared platform, we can modify any form at any time, making changes available to the field technicians immediately, with no disruption or downtime."

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Field Squared

The cloud-based, always-up-to-date aspect of the Field Squared platform was another key difference that made Field Squared stand out. "Other software we looked at required us to pay for updates, which wasn't going to work for us. We're trying to keep up with the time, not spend money every year to get updates at some point in the future," said Potter. "Since Field Squared regularly provides enhancements that consistently improves the platform, we directly benefit and that's a great thing for us."

And it wasn't just Field Squared's unique software that attracted National Metering, but the customer service experience as well. "Field Squared was our first internal software launch. The Field Squared team trained me on the web application—the administrator or field manager's configuration engine to the platform. The team was available via live chat for all of my questions whenever I needed them. They also conducted a webinar with our field employees to get them going. It was just days and we were up and running."

The Results
Increased confidence from National Metering's customers

With Field Squared, National Metering significantly increased operational efficiency across the entire organization. "Field Squared has made us more productive in our work and it's helped greatly on the management side. Work orders, scheduling, tracking and creating reports in real-time helps us relay to our customers when they request something. We send them real-time status updates as to what's going on in the field," said Potter. "With Field Squared, we decreased time spent per work order by 75%, that includes verifications of data, reformatting/naming pictures and forms, locating jobs in the field and job prep work."

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When working with some of their customers, the company experienced something they had not anticipated. "When we were using some of the utilities work order systems, we couldn't help but notice how Field Squared was so much easier to use and includes many features and tools—like barcode scanning or real-time mapping and tracking—that most other solutions just don't have," said Potter. "I think we've impressed some of the utilities with Field Squared, since most of the systems they are using can't do that."

She continues, "One of our favorite things about Field Squared is the confidence our customers have in us at getting the job done right the first time. They can request what they want, when they need it. It's easy to keep them informed with Field Squared," concluded Potter.

About Field Squared, Inc.

Field Squared is the industry's first unified Field Service Management Process Automation Platform. As a cloud-based SaaS solution, Field Squared is flexible, scalable and purpose-built to optimize the efficiency of the mobile workforce in the field. Focusing on business process automation, Field Squared enables enterprises to digitally transform, completely automate and streamline their field service operations, from the frontline to back-office systems. Learn more at www.fieldsquared.com.