

## A Case Study on Dispatching Field People Save \$ and Do It Better With AI

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### Common dispatching challenges

People are not great at dispatching people. Even the word does not inspire excitement for most of us...more a, “necessary evil”. However, the accountability for ensuring our field technicians are where they need to be can make or break us as an operations and maintenance company.

Pitfalls such as over-promising or showing up late, undermine customer confidence. Poor communication frustrates customers and can often lead to lost business. Unreasonable expectations for arrival times and work completion, creates resentment and push back from our field technicians.

Most humans aren’t wired to be good dispatchers. Dispatchers account for many variables including:

- Availability of techs
- Matching a tech’s skill level for a work order
- Tech’s proximity to customer site
- Customer preferences



As the number of field techs and customer sites grow, the complexities compound.

When people make dispatching mistakes, customer *and* employee relations can suffer. Emotions beyond frustration can damage relationships and trust issues between our field techs and dispatchers.

The underlying problems often were due to our techs misinterpreting our dispatcher’s decisions or questions they interpreted as aimed at their competence or a failure to understand the nature of their work. “Are you done yet” and “when will you be there” are loaded questions but obviously essential to the dispatcher’s ability to do a good job.

### Blackfin’s dispatching challenge

In 2006, we started Blackfin and I was responsible for dispatching a handful of mobile techs. Admittedly, I didn’t always do a good job as I multi-tasked and focused on other priorities. As the company grew, this mission-critical work suffered and too often led to missed expectations that frustrated both customers and techs. We knew we needed to do a better job of dispatching.

We hired someone who spent part of their time dispatching field techs. Although this improved dispatching, the dynamics didn't dramatically improve for our customers or techs.

Our customers started using web based real estate software so we became familiar with several of these smartphone applications. We found that these apps fell short of effectively handling dispatching, too.

### **Finding a solution**

We looked for a better solution to our dispatching challenge; however, creating a website or app seemed to simply replicate tools already on the market.

In 2017, we met Matthew Beckner, who proposed an entirely new approach to our challenge: *Text-messaging coupled with artificial intelligence to completely automate dispatching.*



Matt spent hours with our key clients, our techs and our human dispatcher to wire frame the complex workflow loop and Terminus was created. Matt has an intuitive feel for customer experience and has built solutions that mitigate, “technology to human friction” and encourage people to adopt technology by making it work for them:

*Technology should work for people rather than people working for technology.*

### **Outcomes of deploying Terminus AI**

With the implementation of Terminus AI we no longer had to log into websites or apps, deal with forgotten login credentials or waste time learning and navigating complicated systems. Terminus knows users by their phone number and uses intuitive text prompts to expedite work order creation, assignment and closure.

*And because it's AI, it learns with experience and becomes an even better dispatcher.*

Our techs rarely embrace technology intended to “manage” them but Terminus removed the barriers and steps inherent with most traditional systems. This new technology gave our techs control and an empowered sense of responsibility. Our techs wanted us to expand use of the technology because it *helped* them.

Terminus gave our techs control in accepting and scheduling work orders. This subtle change dramatically shifted the culture of our work environment because our techs felt empowered and responsible for handling work requests. Our field techs could estimate arrival and completion times better than someone sitting in an office. Techs also had the ability to defer work requests to other techs if they were busy or the job was not suited to their skill set.

Terminus's dashboard makes monitoring key performance indicators and metrics, easy. We can see what our techs are doing without badgering them.

Communicating status and completion to customers eliminated worry and emotion on all sides. Customers knew when to expect our techs and our techs strived to meet schedules – after all, the techs were the ones making these promises vs a remote dispatcher. We found that personal commitments meant increased reliability and accountability. “Are you done yet” is freighted with negative emotion if a human asks but not so with a machine.

Our customers prefer the text interface because it's easier and faster than using an app or website. Texting a work order and not having to worry about it eliminated stress and distraction for our customers.

### **Embracing technology**

We know that each industry has technologies that are built and useful. As mundane as dispatching sounds, the process is complex and crucial for managing field people and helping them perform, well. Pairing Terminus with existing technology is a great way to remove friction and make current technology work better for all its users.

We're all looking for solutions that give us more time and a better experience. Once in awhile, technology actually does make our lives easier!

### **Automating Dispatch With AI** *Proven results for Blackfin*

Terminus's simple, convenient text messaging capabilities eliminated the need for a full-time employee to dispatch our 50+ techs. This resulted in a savings of **\$62,000 per year**.

Today, Terminus is Blackfin's sole dispatcher. Terminus:

- Fields our work order
- Assigns work orders
- Communicates status and completion notifications

Unlike a human dispatcher, Terminus never takes a day off, gets tied up in a meeting or busy on a phone call when an urgent work order comes in. Terminus is our reliable automated dispatcher.

*Blackfin is an operations & maintenance company serving over 10 million square feet of commercial real estate in 15 states.*