



USE CASE

Field Ticketing

An energy services company focused on natural gas and oil trucking and water logistics turned to TrueContext for assistance with challenges in modernizing its field service operation and overcoming workflow inefficiencies in its field ticketing process.



- ✓ Streamlined operations
- ✓ Improved route planning
- ✓ Gained a competitive advantage
- ✓ Reduced DSO
- ✓ Saved maintenance costs
- ✓ Increased employee engagement



OVERRELIANCE ON PAPER

Managing a large volume of paperwork was challenging, making it difficult to find information. The company realized it quickly needed to go paperless to ensure greater safety and efficiency.

MULTIPLE DATA POINTS

Field tickets containing hundreds of data points are issued to drivers to guide them through pick-up and delivery during on-site visits. The company sought a robust, mobile solution to capture numerous data points efficiently without overwhelming drivers.

The challenge

OPERATIONAL INEFFICIENCIES

Processing paper tickets contributed to higher operational and labor costs, delayed payment, as well as increased potential for errors and fraud. There was a strong need to get away from the manual system and move to an integrated ticketing and invoicing system.

LOW PRODUCTIVITY & RETENTION

The company faced challenges finding and retaining qualified drivers. It was also difficult to provide ongoing training, mentoring, and support to ensure their employee's safety and effectiveness. The company required a simple field management system that could be easily adopted by drivers new and old.

MULTIPLE BUSINESS SYSTEMS

With multiple systems in use for payroll processing and driver records, the company needed a solution that it could easily integrate with its existing platforms.



By just automating the route charging, we saved our admins countless hours of time as they didn't have to look that up manually anymore.

DATA ANALYST
ENERGY SERVICES COMPANY

Outcomes

▶ STREAMLINED OPERATIONS

The company has streamlined its field operations and logistics by seamlessly converting its paper-based process to a fully digital version by integrating its core system of record, CRM, HRM, and account systems. It has gained efficiency and obtained greater accuracy and insights from captured information.

▶ IMPROVED ROUTE PLANNING

TrueContext has given the energy services company the ability to create hundreds of conditional logic rules to determine what to automatically charge a route. Doing so eliminates user errors, reduces the time required to look up information, and speeds up the customer billing process.

▶ GAINED COMPETITIVE ADVANTAGE

Data generated in its dashboards is used for bidding as well as to allocate trucks efficiently across multiple drivers. The information gained from its analytics platform helps the company adjust delivery schedules in real-time and understand the full ROI in order to place bids accordingly.

▶ REDUCED DSO

Days Sales Outstanding (DSO) has been reduced, making the revenue recognition process more efficient, resulting in faster payments and improved cash flow. With TrueContext, the company has moved to a 24-hour billing cycle rather than waiting several weeks to enter and process paper forms.

▶ SAVED MAINTENANCE COSTS

With a single form, the company's drivers simply enter information that's sent directly to the mechanic. This one process has significantly decreased the organization's maintenance budget thanks to eliminating lost paperwork.

▶ INCREASED EMPLOYEE ENGAGEMENT

Employees have a greater sense of ownership now that they have instant access to information and are walked through a step-by-step process using the mobile app. In addition, the ability to quickly identify if a driver has issues that need to be addressed empowers the company to offer additional training when required.



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