# FLYING PHASE

## Automation of Monitoring in Field Operations and Calculating Incentives

### CAPABILITIES COVERED

Process Engineering

Business Automation

Controls and Governance

### FEATURED CONSULTANTS

Parker Barouch

## THE SITUATION

A Top 5 U.S. telecommunications company needed to reduce delays and errors in its incentive payouts to operations field managers and technicians. The key metrics used to distribute more than $5 million in monthly incentives were calculated via several disparate Excel processes executed by four different teams, requiring thousands of lines of accumulated VBA code to execute. With data pulled from emails, dashboards and various SQL databases, and then processed manually, monthly incentive payouts took more than 45 days to calculate and were prone to repeated errors in payments to employees.

The delays and errors drove down execution efficiency and created a backlog of corrections and adjustments. Further, though the incentive program was designed to improve morale and reward productivity, the issues in calculating payouts actually reduced its efficacy, negatively affecting morale and reducing motivation for field personnel to perform above expectations.

**CHALLENGE**

*Streamline incentive payout calculations to eliminate delays and errors in order to improve the incentive program's impact on employee morale and productivity.*

*"Efficiency gains and reductions in manual touches resulted in the process running within minutes, while eliminating error and increasing confidence in the program, driving morale and overall productivity."*

**MEASURABLE RESULTS**

- **Increased employee morale and service calls per hour** by more than 50%
- **Reduced analyst touch time for calculation of incentive amounts** from two weeks to 15 minutes
- **Reduced overall analyst need by 94%,** enabling reinvestment of resources to other areas
- Open-source code base and touch-free processing **reduced average monthly errors by over 90%**
- **Leveraged open-source tools** to ensure sustainability and flexibility for the teams executing and maintaining the process

## OUR APPROACH

We began by inventorying the entire process from start to finish. Focus groups with field operations and the company's Employee Experience team helped us understand the desired business outcomes – and pain points – in the existing process. Close partnership with these teams revealed that the Excel outputs used for data gathering were difficult to understand, there was no visibility to historical data, executives couldn't reconcile field performance with goals, and data quality issues meant performance metrics calculated for operations didn't match those used in incentive calculation.

Working with the internal data warehouse team and the business logic owners, we found that there was no centralized process for logic changes in the process – which led to different teams calculating their own different results. We designed and implemented a system to upload all logic changes in order to standardize reporting of key performance metrics across the enterprise. With the improved data, we leveraged open-source software to automate the process of data pull, calculation and reporting with a transparent and well-controlled code base.

We then worked with executives to redesign a leadership dashboard to provide greater visibility into field operations and actionable insights for decision-makers in operations and finance. This custom-built Tableau dashboard contained all incentive metrics and goals, a breakdown of inputs for calculating payouts, and historical data that made it easy to highlight important trends. A new access framework and differentiated views enabled field managers and technicians to see their individual metrics, supporting transparency and operational improvements.

Beyond meeting the stated challenges, we also leveraged an automated data pull to provide real-time reporting to executives and field personnel. Efficiency gains and reductions in manual touches resulted in the process taking minutes – while eliminating error and increasing confidence, morale, and overall productivity.