



Daily Time Management Process

Flowchart of the Technician's Day

This procedure covers the standard "routine" for a technician. The Technician's Day is a routine, and it is expected that all technicians will follow it very closely. This routine is simply a continuously looping process of subroutines. After each numbered subroutine, begin at the top of the list again. For example, if you have managed to complete the subroutine "Work Urgent Tickets" you go back to the top and work your way through the subroutines in order. See the diagram.

Don't let the diagram confuse you. The basic process is this:

- 1) Check the time. Remember that scheduled work always takes precedence over "regular" priority-based service tickets.
- 2) Check email to process and process it. Technicians do not need to hang out in email all day.
- 3) Check for the highest priority items that you can work on. You cycle through the highest priority oldest tickets first.
- 4) Other things that need to be done. This includes studying for exams, administrative work, cleaning up the office. Whatever needs to be done.

Since the entire process really amounts to beginning the day, working everything in priority order, and ending the day, it is easy to learn. **Remember, one of our mantras is that nothing should ever be lost, dropped, or forgotten.** That's why it is critical that everything be in our PSA system AperionPSD. Once it's in the system, and every technician is cycling through this process, you will eventually work every ticket and every task.

The Warm Up

There is a bit of process that takes place before the technician starts the day. Because a service environment is always changing, it is reasonable to expect that a technician will check email and the PSA in the morning before heading into work (or perhaps the evening before).

Your manager might want the technician to show up at a client's office first thing in the morning or be in a meeting first thing at 8am. Or perhaps pick up supplies. Or whatever. The main thing you want to avoid is having the technician show up at the office and discover that he should be at a client's office instead or be in a meeting.

In our project management, we sometimes use the "golden hour" of 7:00 AM to 8:00 AM to accomplish tasks before clients show up for work. If your technician is expected to be at a client's office (or working remote) at 7:00 AM, they need to know this before showing up for work at 8:00 AM!

Checking the service board and this bit of email are trivial tasks. They amount to "checking your work schedule" and are not paid time. Technicians are NOT expected to do anything else with the service board at this time. Technicians are NOT expected to process their email at this time. The only thing they need to do is figure out where to be to start the day.



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Not Every Tech Can Work Every Ticket

Not every technician can work every ticket. This might be because of knowledge, skill, client relations, or whatever. In addition, some tickets will be assigned to specific technicians. So, if a technician looks at a ticket and sees that it is assigned to someone else, they should move on to the next ticket.

It is not uncommon that you will have an example scenario such as this: Tom shows up for work and starts the process. He checks email and then looks at tickets. There are no urgent tickets and no high priority tasks. He checks for any medium priority tickets. There are five. One is assigned to Bob, one is assigned to Mike. One is waiting for client feedback. One is scheduled for Friday.

At this point, there is only one medium ticket that Tom can work. When Tom reviews the notes, he might discover that it's a system he doesn't understand, or that it has escalated to a level beyond what he is able to do. That's fine. He moves on to low priority tasks (internal "to do" items).

There are two key things to remember here.

First, each technician is expected to do what he can to move each ticket forward as much as possible. ***Part of the measure of a successful day is moving tickets through the system.***

Second, a technician should not open a ticket, look through the notes, decides he can't make progress, logs time to it. Don't let techs log useless time against tickets.

Really good notes, and direction from the last technician who touched the ticket go's a long way to avoiding the second scenario above. Use the code WITNS (what is the next step) to flag the obvious next step. The ticket should tell a story and have actionable instructions and information in the ticket.

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