

How optimised is your utility workforce?

A practical self-assessment for Energy, Utilities and Resources leaders



Discover where your field workforce performs well, where improvements are possible and where to focus next.

Designed for:

- Operations Directors.
- Heads of Field Operations.
- Asset Managers.
- Service Directors.
- COOs.

Presented by Platned

Helping Energy, Utilities and Resources organisations improve workforce performance through practical advice, industry expertise and IFS solutions.



Why workforce optimisation matters

Utilities are being asked to manage increasingly complex operations while maintaining reliability, controlling costs and meeting growing customer and regulatory expectations.

At the same time, ageing infrastructure requires more maintenance, experienced employees are retiring and skilled technicians remain difficult to recruit. For many organisations, simply adding more people is neither practical nor sustainable. The opportunity is to make better use of the workforce already available.

Time lost through unnecessary travel, repeat visits, administration, inefficient scheduling and disconnected systems can significantly reduce available capacity.

Leading utilities are addressing this by improving how work is planned, scheduled and delivered, giving teams better information and using operational insight to improve performance continuously.

This assessment will help you understand your organisation's maturity across four areas:



Workforce
capacity.



Planning and
scheduling.



Operational
resilience.



Technology
and leadership.

There are no right or wrong answers. The objective is to identify strengths, uncover opportunities and decide where to focus next.

How to use this workbook

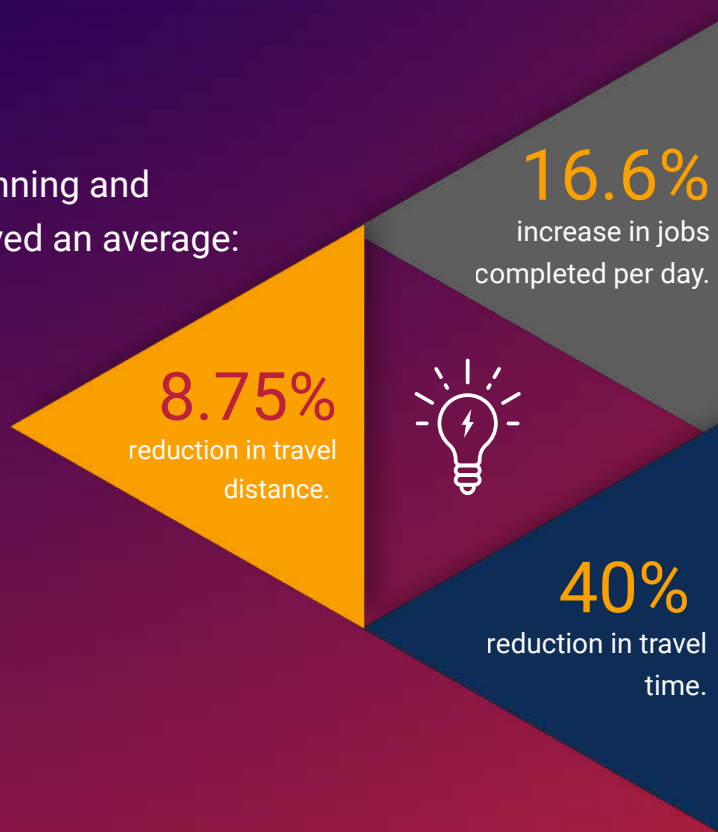
For each statement, score your organisation from 1 to 5 based on your level of confidence.

Maturity scale

Your organisation today	Score
Largely reactive or not in place, with limited visibility.	1
Some processes exist, but they are inconsistent or manual.	2
Reasonably well established, with opportunities to improve.	3
Well managed, measured and regularly reviewed.	4
Fully optimised, insight-led and continuously improved.	5

Did you know?

Organisations using AI-powered planning and scheduling optimisation have achieved an average:



How well do you understand your workforce capacity?

Increasing headcount, overtime or contractor usage can provide additional capacity, but it does not necessarily address the underlying causes of lost productivity.

Leading organisations understand where technician time is spent and where capacity is being lost, allowing them to improve productivity before simply adding more resources.

Using the maturity scale on [page 4](#), how confident are you that...

Assessment	Score 1-5
You understand where technician time is really spent each day.	
You can quickly identify where workforce capacity is being lost.	
Travel time is regularly reviewed and minimised wherever possible.	
Overtime is planned strategically rather than driven by operational pressure.	
Contractor usage reflects business strategy rather than resource shortages.	
Critical knowledge is effectively captured and shared across the workforce.	
Administrative tasks do not prevent technicians spending most of their day on productive work.	
Your workforce planning supports future demand as well as today's workload.	

Your score: ____ /40

Your maturity

8-16 | Reactive - Limited visibility means productivity issues are often identified after they affect operations.

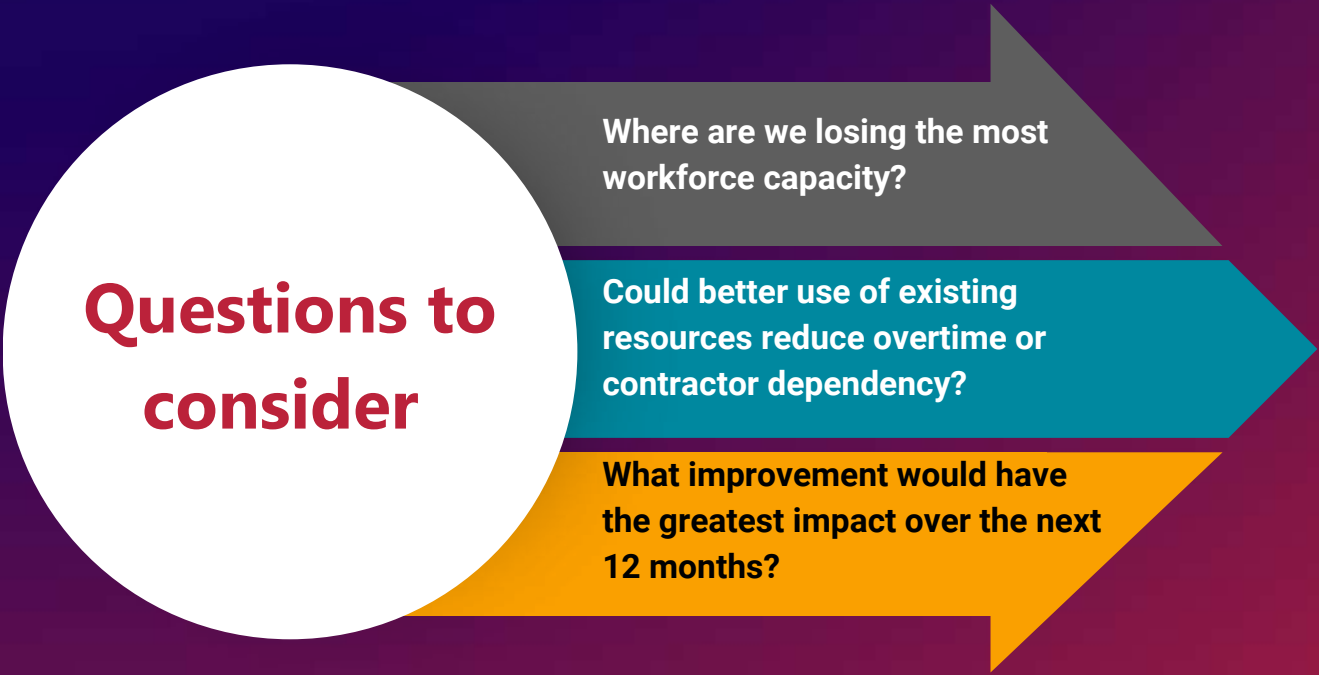
17-24 | Developing - Some workforce information is available, but improvement remains inconsistent.

25-32 | Mature - Workforce performance is regularly reviewed and supported by reliable information.

33-40 | Optimised - Capacity is continuously monitored and improved, allowing the organisation to adapt quickly.

Leadership insight

Workforce capacity is not simply about how many people you employ. High-performing utilities understand where existing capacity is being lost through travel, administration, waiting and repeat work. Removing unnecessary effort can create valuable additional capacity without increasing headcount.



Questions to consider

Where are we losing the most workforce capacity?

Could better use of existing resources reduce overtime or contractor dependency?

What improvement would have the greatest impact over the next 12 months?

How effectively do you turn capacity into productive work?

Planning and scheduling determine how effectively available workforce capacity is converted into completed work.

Static plans can quickly become outdated as emergencies, changing priorities and unexpected events arise. More mature organisations continually balance workloads, skills, location and priorities to make better use of available resources.

Using the maturity scale on [page 4](#), how confident are you that...

Assessment	Score 1-5
Work is prioritised consistently across the organisation.	
Schedules can be adjusted quickly when priorities change.	
The right technician is assigned based on skills, qualifications and availability.	
Travel time is considered when allocating work.	
Emergency work can be accommodated without significantly disrupting planned activities.	
Planning processes can support future growth and changing operational demands.	
Planners have the tools and information they need to make effective decisions.	
Maintenance activities are grouped wherever practical to reduce unnecessary travel and repeat visits.	

Your score: ____ /40

Your maturity

8-16 | Reactive - Planning relies heavily on manual intervention and frequent schedule changes.

17-24 | Developing - Processes are established but can struggle when priorities or conditions change.

25-32 | Mature - Planning supports effective coordination, allocation and workload balancing.

33-40 | Optimised - Schedules continuously adapt to changing conditions while maintaining productivity and service performance.

Leadership insight

Effective planning is no longer simply about creating tomorrow's schedule. Leading utilities expect disruption and build flexibility into their operations. Better information allows planners to spend less time reacting and more time making decisions that improve workforce productivity and service.

Questions to consider

How quickly can we respond when priorities change?

Are planners optimising work or continually reacting to disruption?

Could better planning reduce travel, overtime or repeat visits?

How prepared are you for operational disruption?

Operational resilience is not simply about restoring service quickly. It depends on how effectively an organisation prepares, responds and returns to normal operations.

Leading utilities combine proactive maintenance with the ability to mobilise resources quickly, reprioritise work and maintain visibility when unexpected events occur.

**Using the maturity scale on [page 4](#),
how confident are you that...**

Assessment	Score 1-5
Your organisation can rapidly mobilise the right people and resources during major operational events.	
Operational priorities can be adjusted quickly as incidents develop.	
Leaders have real-time visibility of workforce activity and restoration progress.	
Communication between field teams, planners and control centres remains effective during major events.	
Planned maintenance and emergency response are balanced without creating unnecessary backlogs.	
Preventive maintenance programmes reduce the likelihood of avoidable outages.	
Your organisation can return to normal operations quickly after major incidents.	
Lessons from operational events are consistently used to strengthen future resilience.	

Your score: ____ /40

Your maturity

8-16 | Reactive - Emergency response relies heavily on manual coordination and limited visibility.

17-24 | Developing - Incidents are managed, but coordination and recovery remain inconsistent.

25-32 | Mature - Clear processes support effective response, coordination and restoration.

33-40 | Optimised - Preparation, real-time visibility and continuous improvement are embedded across operations.

Leadership insight

Resilient organisations do more than respond well to disruption. They reduce its impact before it occurs. Preparation, proactive maintenance and better operational visibility allow leaders to make faster decisions during an event and help teams return to planned work sooner afterwards.



Questions to consider

How quickly could we mobilise resources if a major event occurred tomorrow?

How much real-time visibility would leadership have?

What did we change following our last significant operational incident?

Do your people have the information and support to perform?

Technology creates value when it helps people make better decisions and removes unnecessary work.

Disconnected systems, unreliable data and manual processes can limit visibility even where significant technology investments have already been made. More mature organisations connect information across operations and use it to support decision-making, automation and continuous improvement.

Using the maturity scale on page 4, how confident are you that...

Assessment	Score 1-5
Leaders have access to accurate operational information when making decisions.	
Field teams can access the information they need wherever they are working.	
Operational systems share information without unnecessary manual intervention.	
Workforce performance is measured using meaningful KPIs and dashboards.	
Reliable data supports planning, forecasting and decision-making.	
Automation reduces administrative effort and improves operational efficiency.	
Your organisation actively encourages innovation and continuous improvement.	
Your technology and leadership approach can support future operational growth and changing expectations.	

Your score: ____ /40

Your maturity

8-16 | Reactive - Disconnected processes and systems limit operational visibility.

17-24 | Developing - Digital capabilities exist, but integration and leadership visibility remain inconsistent.

25-32 | Mature - Technology and reliable information support operational decision-making and improvement.

33-40 | Optimised - Connected information, trusted data and continuous improvement support confident decision-making.

Leadership insight

Digital maturity is not measured by how many systems an organisation owns. It is measured by how easily people can turn information into action. Technology should reduce friction, improve visibility and give leaders and field teams greater confidence in the decisions they make.

Questions to consider

Do we trust the information used to make operational decisions?

Where do disconnected systems or manual processes create unnecessary work?

Are our KPIs helping us improve performance or simply reporting what has already happened?

Where are your biggest opportunities?

Your scores provide a snapshot of workforce optimisation maturity across your organisation.

The objective is not to achieve a perfect score. Look for the areas where improvement could have the greatest operational impact.

 Section	 Maximum	 Your score
 Workforce capacity	40	_____
 Planning and scheduling	40	_____
 Operational resilience	40	_____
 Technology and leadership	40	_____
Total	160	_____

Your maturity

32-64 | Reactive - Many processes remain reactive, with opportunities to improve visibility, coordination and consistency.

65-96 | Developing - Good foundations exist, but targeted improvements could significantly improve workforce performance.

97-128 | Mature - Established processes and good operational visibility provide a strong foundation for further optimisation.

129-160 | Optimised - Workforce optimisation is embedded, with trusted insight supporting continuous improvement.

Your action plan

The area we will focus on first is:

The biggest improvement we want to achieve is:

The first action we will take is:

Success will look like:



Turn insight into action

Your assessment should give you a clearer picture of where your organisation performs well and where there may be opportunities to improve.

The next step is to understand why those gaps exist and which changes could have the greatest impact. For some organisations, that could mean improving planning and scheduling. For others, it may involve connecting operational information, giving field teams better tools, improving asset visibility or reducing manual work.

Technology can play an important role, but it should support clearly defined operational priorities.

How IFS can help

IFS brings together capabilities designed for asset and service-intensive organisations, including:

- ▶ [IFS Cloud.](#)
- ▶ [Enterprise Asset Management.](#)
- ▶ [Field Service Management.](#)
- ▶ [Planning & Scheduling Optimisation.](#)
- ▶ [Industrial AI.](#)

These capabilities can help organisations connect assets, work and workforce information, improve planning and scheduling, support field teams and use operational insight to continuously improve performance.

Where Platned comes in

As an IFS Specialised Partner, Platned helps Energy, Utilities and Resources organisations understand where IFS can deliver practical operational value. We work with organisations to assess existing processes, identify improvement opportunities and build a realistic roadmap based on operational priorities rather than technology for technology's sake.

Ready to explore your results?

Book a Workforce Optimisation Assessment with a Platned specialist. We can review your assessment, discuss your priorities and identify practical opportunities to improve workforce productivity, resilience and service delivery.

A final thought

Workforce optimisation is not simply about doing more with less. It is about making better use of the people, information and resources you already have.

