

2022 

INTELLIGENT SOLUTIONS FOR
WORKFLOW AUTOMATION



Case Study

CLIENT USE CASE 

Corporate Occupiers

CASE STUDY

THE CLIENT

Joao clicked off the news article that he had been sent by one of his colleagues. The article had just driven home something that Joao already knew ... their industry was becoming even more competitive.

What's more, with the influence of COVID on their use of an office, the Company's ability to implement workplace strategy had been compromised.

Joao believed that a company's ability to succeed relied upon them getting the best candidates for the job and providing them with a productive environment in which to deliver results.

But how could he balance the desire for flexibility from his colleagues with his belief that having people collaborate in the office was the best way to increase productivity.

Over the years they had looked at all the tools that any medium-sized organisation had at their disposal when it came to workplace management and employee engagement:

- corporate intranets
- on-site fitness and team building activities
- 'hot desking'

and many more.

Joao felt deep down that it was how the space could be made to work harder and react the requirements of his colleagues that held the key. **But how could this be implemented, and more importantly managed efficiently?**

THE CLIENT'S STORY

Joao spoke with the office manager to get a sense of the issues that he had to deal with on a daily basis. The office manager had been on furlough during the pandemic but had now been redeployed into another role. It had always been a utility position in their company in any event ... having to pick up a lot of tasks that otherwise had no clear owner. Was this position no longer needed? Or could they take action to ensure this position was no longer needed?

The list of issues raised had a number of common complaints: no meeting rooms; duplicated bookings for resources; too hot; too cold; a weird smell; meeting rooms left messy; food left in the breakout area; a spill that hadn't been cleaned up; dirty and broken toilets.

Joao walked around the office and considered every aspect of what had been invested in the space.

The fitout costs had not been cheap and they had followed their consultant's advice of having 'activity based zones' but Joao knew there was more that could be done.

How could he give his colleagues greater ownership and accountability for their space. How could he give them greater power and transparency over the shared resources in which the Company had invested. How could he optimise the working environment for productivity ... from temperature to air quality to noise levels. This was where his Company could win.

But how to do it without signing on for a complicated set of systems that would require more time on integration and training that the Company could afford.

There had to be a solution out there.

THE CLEVERLY SOLUTION

The Cleverly platform provides a single solution for space management. With modules covering all aspects of workplace operations, from environment monitoring to resource booking; scheduled and reactive maintenance; compliance and finance. Cleverly also provides third party suppliers with access to a portal that provides them notifications and issues jobs ... from catering to flowers.

Cleverly can bring complex operations into a single source of truth. Below is a list of the modules and functionality to be used by Joao in operating his workplace:

ENVIRONMENTAL MONITORING

Productivity of employees is highly correlated with their working conditions. Often the environmental consideration is simplified to 'home', 'office' or some third space but in actuality it is much more nuanced than this. Temperature and noise levels play a very important role. Less obvious, but perhaps even more important is the air quality in which employees are working.

Airborne pathogens and volatile organic compounds (VOCs) can majorly affect a company's productivity whether this be in days lost to sickness or cognitive function (how well their brains are working!),

However, most systems are siloed and just record or report levels. With Cleverly, you can configure the system to generate work orders to the appropriate supplier automatically - whether an on-site engineer or a completely external third party.

It's not just monitoring. It's taking positive actions.

CORPORATE OCCUPIERS

RESOURCE BOOKING

Creating a more flexible workspace means more easily managing employees' use of the shared facilities.

This can include enabling them to book a desk, parking space, podcast studio or meeting room; automatically cancelling bookings following non-attendance (ghost bookings); monitoring usage of resources and putting the data to work (pun intended!) to ensure that the resources provided are fit for purpose.

By providing shared calendars, employees can immediately see availability of resources as well as information about the asset. You can also tag resources so that searches can be more tailored to usage requirements or resources can be linked to activity or user types.

REACTIVE MAINTENANCE

Ensuring that productivity remains high and the workplace provides the appropriate platform will require ongoing maintenance, both reactive and planned. The Cleverly platform handles reactive maintenance with ease, whether this be in-house engineers or an external supply chain.

You can create any sort of reactive task, whether this be ordering food or flowers; or dealing with leaks and air conditioning issues. All service lines are editable to fit your needs, the system allows you to deal with different priority levels (P1 - P5 as standard) with rates to customers and suppliers able to be tailored to suit. Jobs can be sent to engineers on a 'first come, first served' basis or routed to specified engineers based on rules you create.

If you use Helpdesk operatives, the tasks component of the reactive maintenance module allows them to get reminders and notifications of any outstanding requirements. Pre-specified reminders and notifications include:

REACTIVE MAINTENANCE (CONTD.)

- Suppliers needing to be assigned
- Late arrivals
- SLA breaches
- Quotes returned
- Comments from suppliers or customers
- Job reports unsent

The system also utilises triage solutions, meaning that custom questions can be added to particular jobs or job types. This allows information to be gathered to increase first fix rates, as well as minimising call out costs if there are issues that can be fixed by the client on-site with sufficient knowledge.

SCHEDULED MAINTENANCE

Any well run workplace will also utilise planned maintenance to keep all assets operating and reduce costs over their lifecycle.

Cleverly allows multiple contracts to be in place on a single site, with each contract in turn operating across a number of service lines. The system can also accommodate multiple locations as appropriate.

The Cleverly scheduled maintenance module allows for:

- Standardised job templates (e.g. along SFG guidelines)
- Deadline dates to be rolling (based on prior attendance)
- Attendance times to be confirmed via automated reminders to suppliers and clients
- Summary reports for PPM visits
- Linking PPM attendances with compliance requirements
- Automated invoicing based on contract setup
- Centralised storage of all PPM documents

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FINANCE

Joao's team previously relied on a combination of Xero and internal record-keeping when handling the financial elements of his facilities management business. Cleverly allows Joao to export financial data with a single click, rather than spending hours pulling together information from many different locations. Joao is also looking at switching his accounting system to Sage which is another integration of Cleverly meaning that business continuity is assured.

COLLEAGUE & SUPPLIER COMMUNICATIONS

Joao recognised that there was no point implementing a new system if it did not integrate with their existing communications methods and make it easy to send/receive information.

Part of this involved the calendar integrations for booking resources but Joao also wanted to ensure that emails could be sent to (and saved) within the system. This was going to be important if they were to do without a full-time office manager in the future.

Most other systems on the market, even at multiples of the cost of Cleverly usually miss this functionality: the ability to centralise and organise communications between clients and suppliers. Instead, colleagues are forced to (continue to) use emails, Post-IT notes, scribbles on random pieces of paper.

In addition to external communications, internal notes can be added, and questions directed to other employees for input. Further, with WhatsApp, Slack and SMS integrations you can even add in messages from other channels if they are used by your team or suppliers.

CORPORATE OCCUPIERS

DATA & ANALYTICS

Within data is contained information. From information, you can draw insight. For Cleverly, our Data & Analytics module is designed to allow clients to draw insight from their workplace management or property maintenance activities.

For Joao, these data relate to questions such as how often resources are being used; what the costs of maintenance are (by property or by service); what occupancy rates were like in the office. Of greatest importance was linking these data to his business intelligence regarding overall Company operations. Using Cleverly's export capabilities, for example via the Data Studio or Metabase integrations, Joao can overlay company information to determine optimum working environments for the Company overall.

The data module of Cleverly can be configured to your requirements. Whether this is tracking downtime costs, looking at trend analysis or creating budgets, it allows office managers, facilities managers and decision makers to move from instinct to insight.

CONTRACTOR MANAGEMENT

Joao uses a number of external suppliers to keep his office humming. These included food and beverage providers as well as hygiene and cleaning companies. Often these services were not tendered and no data was kept as to whether they were getting good value for money in terms of product or performance by suppliers.

Whether you need to track specific metrics (for bonus payments or the satisfaction of contractual requirements), or just want to ensure that your engineers (or supply chain) are performing at the required level, Cleverly makes this easy.

CONTRACTOR MANAGEMENT (CONTD)

Along with the Data & Analytics module, Contractor Management can be configured by Cleverly clients to provide them with the information they require across a number of different variables.

Examples of the contractor management metrics are as follows:

- First time fix rate
- Average spend by service line
- Average spend by supplier
- Time to site attendance
- Average job duration
- Percentage of jobs open/closed
- SLA breaches
- Compliance works completed

By having this information available, Joao can address issues before they affect employee productivity and inform their discussions in his regular meetings.

When considering a change of supplier or tendering service delivery for some of his larger line item costs, Joao can provide accurate, detailed information as to what the Company needs from suppliers and attach SLAs/KPIs accordingly.



THANKS FOR READING ABOUT
HOW CLEVERLY HELPS ITS CLIENTS
IMPROVE THEIR OPERATIONS.

IF YOU WOULD LIKE TO DISCUSS
HOW CLEVERLY CAN BRING OUR
SMART SOLUTIONS TO YOUR
BUSINESS, GET IN TOUCH WITH US

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