INTELLIGENT SOLUTIONS FOR WORKFLOW AUTOMATION

Case Study

CLIENT USE CASE

Facilities Management Company

cleverly

CASE STUDY

THE CLIENT'S STORY

It was a bright and sunny November day as Andrew drove up the M1 to his client meeting. These were the sort of days that Andrew loved - bright but crisp - and another potential client at the end of his journey.

The last few years had been good for Andrew's company. The business was growing strongly, and their offering of excellent service and a high level of professionalism was being well received by the market.

The music cut out and there was the moment's silence that anticipates a call connecting over the car's bluetooth. Andrew saw that it was the office number - no real surprise there.

It was a member of Andrew's Operations team.

"Hi Andrew - sorry to bother you with this, but I can't work out how to input the new PPM schedule for Property Management Company".

"Why. What's the issue?" asked Andrew, knowing it could have been any number of things.

Whilst the business had grown, the systems that the Operations team had been using had not kept up with the increased volume and complexity of their clients' business. Whilst things worked well enough for booking a simple reactive job, anything more complicated needed to be tortured to conform to system limitations.

THE CLIENT'S STORY

What was worse, Andrew was finding it difficult to make business decisions because although revenue levels and the quantity of jobs were part of their current system, they were often not reflective of the real situation.

For example, there was just one PPM visit entered per site per month, which allowed the team to generate an invoice. This was skewing job values and the number of jobs actually being performed by his team. In addition, the actual tasks to be completed on any PPM visit were kept outside of the current system meaning that scheduling was problematic.

To complicate things further, now that clients had come to rely on Andrew's company they had been putting more work his way. That was great, but it meant moving beyond the standard M&E services that had traditionally delivered.

Andrew was transparent with his clients about using subcontractors - they trusted him to find good ones and appreciated his managing this supply chain - but chasing them for invoices, and monitoring their attendances was very labour intensive. Particularly if he wanted to maintain his level of service to clients.

"Well, we are chasing Property Management Company for an outstanding invoice for the PPM on one of their sites but they claimed they have paid" said the member of his Operations team.

"When I look at the system there are some invoices for this site, but they don't seem to have been reconciled." she went on.

"Now I need to put in place a new PPM contract and I can't work out how to combine these on their account. There is already an account for this site."

THE CLIENT'S STORY

The green fields flashing by in the windows of Andrew's car did little to give him the sense of peace that normally accompanied his leaving the city. Andrew knew that he was postponing problems for another day but he also needed to get this issue resolved as quickly as possible and focus on the upcoming pitch.

"Just create another account and add 'Contract 2' to the property at the end" said Andrew.

The decision made sense to Andrew and would allow the Operations team to at least get these jobs into the system but Andrew knew that it was another peculiarity or anomaly that would need to be explained to his accountants, Operations team and suppliers.

He also knew that it was going to make selling the business that much more difficult in the future - something that was on his horizon.

He couldn't go on doing this forever but unless he made it easy for a new owner to understand the operations of the business and get a handle on clients quickly, he was going to severely decrease the price a buyer was willing to offer for the Company.

Wouldn't it be easier if there was a scalable software platform that could do more of the heavy lifting for his business? Parts that at the moment were done by employees, Excel spreadsheets and processes that existed only in his mind?

Andrew tried to get back into the zone and prepare for this upcoming pitch. It was for a national retailer and he had been really excited about this prospect. After the call, however, Andrew was starting to feel nervous about winning the business.

As much as he dreaded it, he would have to revisit the FM software offerings when he was back in the office.

THE CLEVERLY SOLUTION

The Cleverly platform provides a single solution for facilities management companies. With modules covering all aspects of FM operations, from reactive through to scheduled maintenance; field management to finance,

Cleverly can bring complex operations into a single source of truth. Below is a list of the modules and functionality that is being used by Andrew in his facilities management business:

REACTIVE MAINTENANCE

Reactive maintenance forms around 65% of Andrew's business. The Cleverly platform handles reactive maintenance with ease, whether this be in-house engineers or an external supply chain.

With up to 140 service lines pre-populated, and 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.

For 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

Andrew also utilises the triage solution, that means 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 to clients if there are issues that can be fixed by the client on-site with sufficient knowledge.

Andrew has set up these questions to suit his own requirements.

SCHEDULED MAINTENANCE

Andrew's business is responsible for the provision of PPM across many sites. This can often involve having multiple contracts at a single site, with different start dates and terms of service.

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 Cleverly scheduled maintenance module allows for:

- Batching of tasks
- 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

FIELD MANAGEMENT

Andrew uses a mix of both in-house and external engineers. In delivering to clients, he did not want to have to pay for a separate field service solution for his own engineers, or incur costs for external suppliers to ensure that they could provide the reports that clients required.

Cleverly allowed Andrew to provide his own supply chain with a mobile and web application that would:

- Notify them of jobs assigned or available
- Track engineers on their way to jobs
- Allow external suppliers to complete job reports
- Notify Andrew's Helpdesk of job status changes or uploads
- Filter all reports through Andrew's Helpdesk, avoiding client communication
- Automatically capture all job and timing data
- Route jobs to internal/external engineers based on custom rules.

FINANCE

Andrew previously relied on a combination of Xero and internal record-keeping when handling the financial elements of his facilities management business. Cleverly now allows Andrew to send financial reports to his accountants with a single click, rather than spending hours pulling together information from many different locations.

For Andrew, one of the key benefits of the Cleverly financial management system is that it automatically creates invoices for his suppliers based on rates and costs agreed with his supply chain and uploaded into the system.

This means that Andrew no longer needs to chase suppliers for invoices and has his profit levels always available on a job by job basis.

FINANCE (CONTD.)

Client invoices are also automatically generated based on client rates which are kept separate from those of his supply chain.

Andrew can set account thresholds for clients at both an account level as well as spend limits on individual jobs.

Outstanding invoices are also always visible and chaser emails are sent as part of Andrew's system settings.

Payments are reconciled via the Cleverly platform and Andrew can see with a single click, the financial health of his company.

CUSTOMER & SUPPLIER COMMUNICATIONS

When Andrew was looking at other systems on the market, one thing was clearly missing: the ability to centralise and organise communications between clients and suppliers. Emails, Post-IT notes, scribbles on random pieces of paper. All of these had formed parts of the communications log in the past, which made it very difficult to audit in the case of any issues and severely hampered the office's functionality on a daily basis.

Cleverly offers Andrew a single source of truth where his team can communicate both with suppliers and engineers, as well as customers. Whether this is relating to an uplift request or access information, all communication is stored as part of the job and customer logs. Additionally, the communications log automatically stored all system generated messages that are sent, for example attendance confirmations, status changes or the sending of invoices.

Even better, Cleverly offers an email 'listener' so that when emails are sent regarding jobs or work orders, they are automatically added to the communications log via the system's integration with Google Mail.

CUSTOMER & SUPPLIER COMMUNICATIONS (CONTD.)

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.

CUSTOMER REPORTING

IAndrew was always determined to provide good service to his clients. He viewed each client as the opportunity to create a long term relationship and knew that the only way that this was going to happen was if he continued to deliver at a high standard.

The problem, Andrew found, was that there often seemed to be no correlation between what Andrew felt his performance was and the client's opinion thereof. Andrew would have welcomed some context, both performance through time and the current state of play.

Cleverly's customer reporting capabilities provide Andrew with the information he needs to anticipate questions from clients as well as ensure that his team is operating to the levels to which he aspires.

With the ability to instantly provide data to clients around spend history, current work order situation, high spend jobs or locations and others, Andrew not only enhances his value to prospective clients but deepens his relationship with existing clients.

Cleverly provides a number of reports as standard and allows for customised reporting to be provided across the universe of parameters within the system.

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 Andrew, his clients have always appreciated his ability to demonstrate what look like anomalies in spending as well as highlighting to them data that may be a leading indicator of other or associated problems. It would allow them to do their own root cause analysis and decide on the appropriate actions.

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 facilities managers and their clients to move from instinct to insight.

Andrew uses the following components of the analytics module:

- Operations data
  For example how long it takes to get on site or for jobs to be picked up)

- Business Data
  For example highlighting the Company's top customers and their spend pattern, spend by service line, and

- Financial data
  For example to be exported for VAT reconciliation and get overall Company profitability information

CONTRACTOR MANAGEMENT

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.

Along with the Data & Analytics module, Contractor Management can be configured by 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, Andrew can address issues before they come to light with customers and inform their discussions in his regular meetings.

For service lines which Andrew does not self-deliver he has found this invaluable in ensuring that his supply chain reflects well on him and/or where he needs additional cover or a change of supplier.

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

E: CONTACT@CLEVERLY.WORKS

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