

The Service Community

The only truly non-aligned industry community where service professionals can share experiences



Value

Choice Architecture
Educating the Customer

Chris Craggs and Terence Horsman
30 September 2021



Henley
Business School

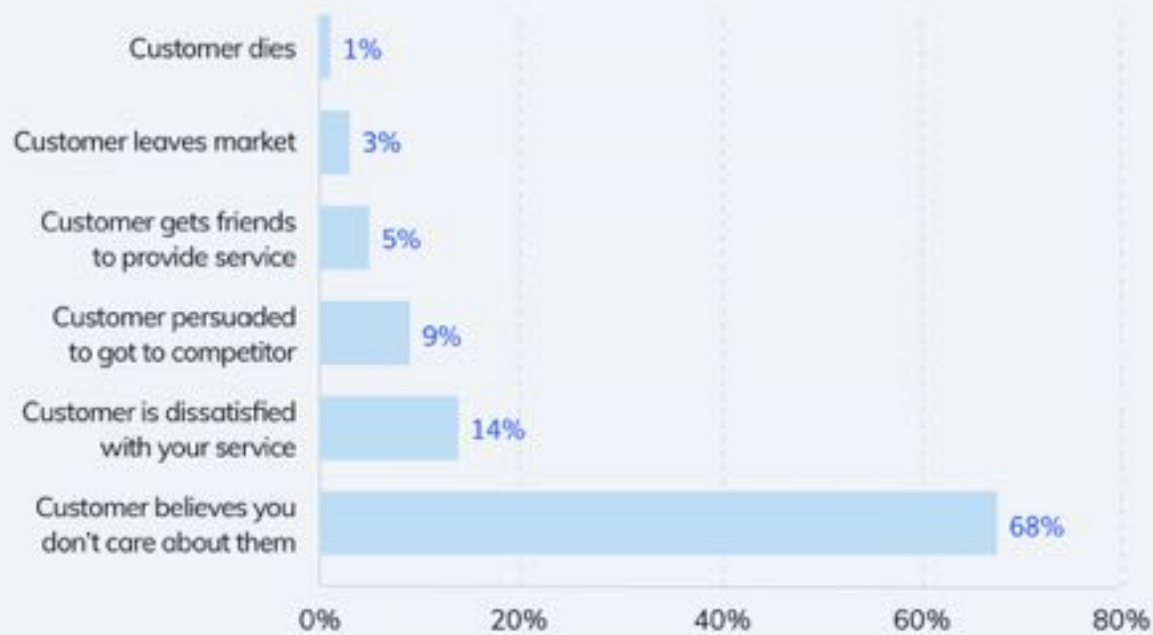
Field Service

- ▶ Focus
 - ▶ Choosing the business model
- ▶ People
 - ▶ Key to service delivery
- ▶ Enabled
 - ▶ Frictionless, informed
- ▶ Energy
 - ▶ Nothing happens without zing
- ▶ Educating
 - ▶ Why do we believe our customers should understand our business – good from bad?



Local

Why Do Customers Leave a Company?



Very little here about software...

Local

- ▶ “we want someone local”
- ▶ We want the same, regular contacts – technician, service desk, accounts
- ▶ And for them to value us, know us, “join our team”
- ▶ Specifically non IT (but must be enabled by IT)



The Rounded Technician

► Technical Statutory

Competence – safe, fault-finding
Manufacturer-endorsed



*Trusted Partner to
Global Brands*

► Social

Communication – customers, colleagues
Growth – continuous development



MCFT
PATHWAY

► Commercial

Safe
Customer experience
Financial - Lean
Sustainable

**proud
to work
safe** 



And yet nothing (*) happens without technology...

Starting with not finding (bad IT experience??) something to suit our needs

* As long as it's affordable and suits our plans – see later...

History of ORCA Service Technologies

1996

Access 2.0: filing system +
compensate for poor
handwriting

ERP: quote to invoice; job
costing

2012

Field Application

2019

Start of new platform
development (agnostic)
and BI focus

2021

**ORCA Service
Technologies**

2008

Smart Pens

2016

IRIS Customer Portal

2020

COVID

Risk of loss of 24 years of
development

Software by Field Service Professionals





Customer
Value

Phases of System Growth

1 Enterprise Resource Planning

Capture Data, Workflow

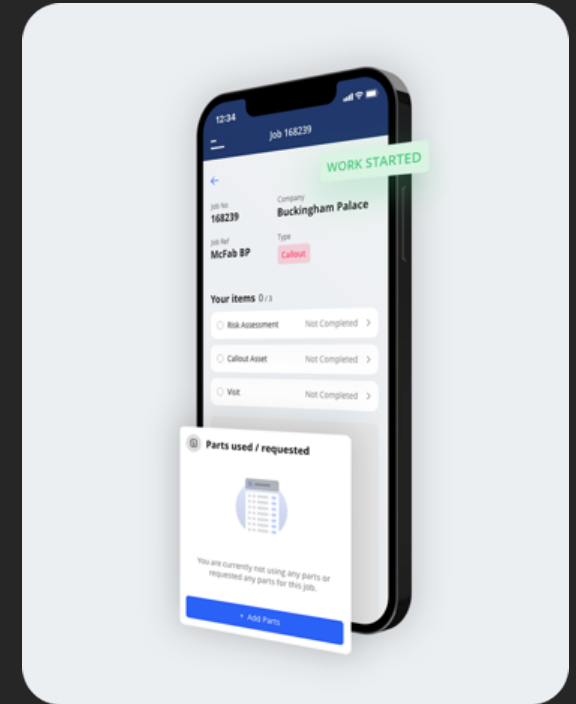
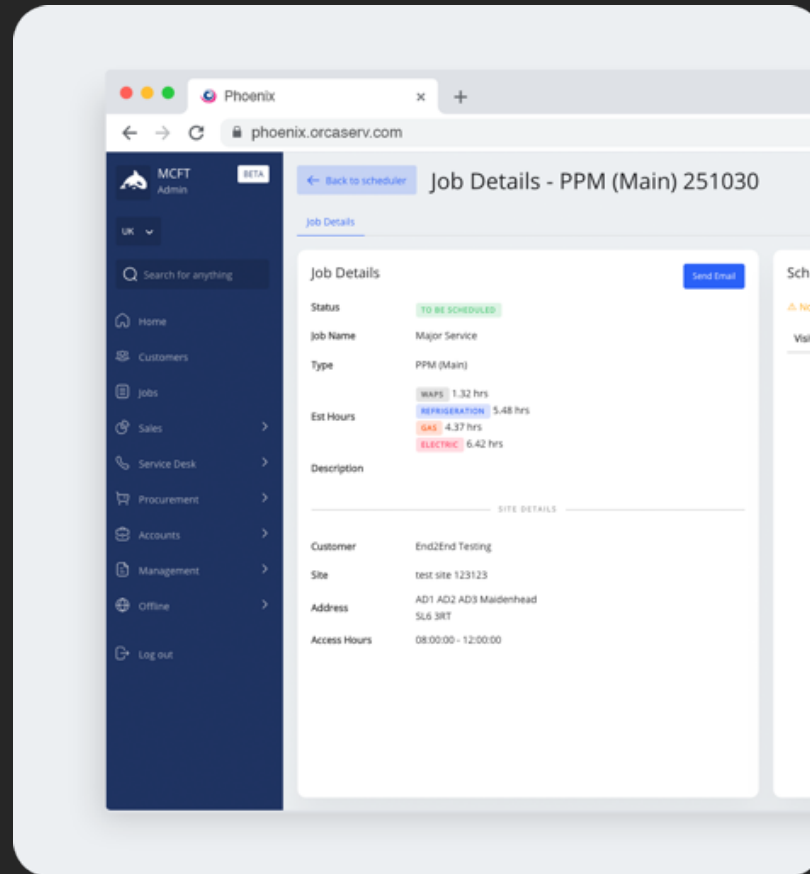
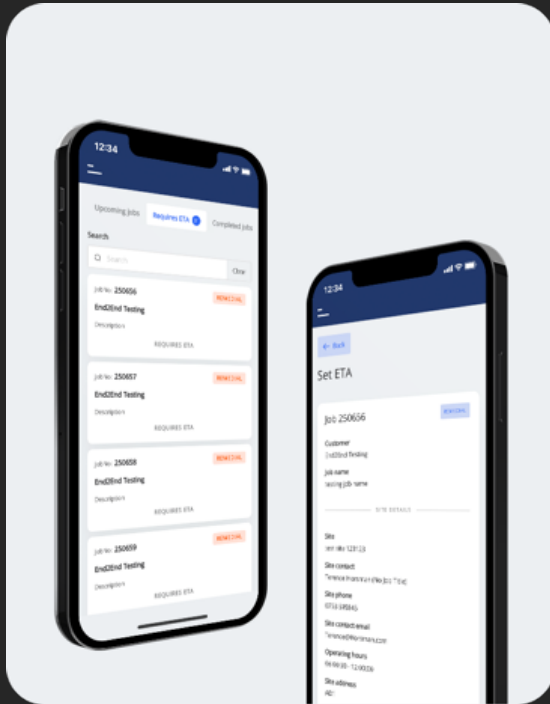
2 Business Insights

Reporting, Alerts, KPIs, SLAs

3 Shaping Behaviours

Systemic Cultural Change,
Choice Architecture,
Business Intelligence.







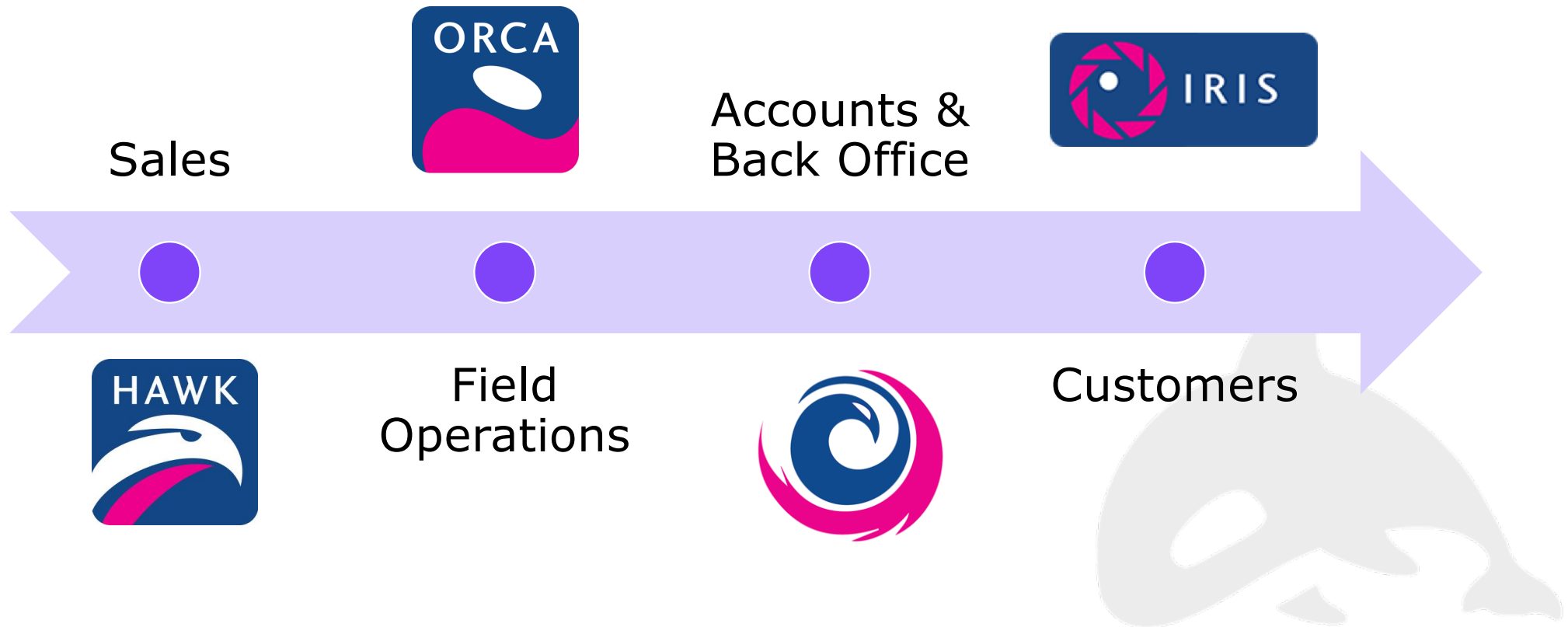
Phase 1

Enterprise Resource Planning



Phase 1

Enterprise Resource Planning



Not all assets are equal



Cup Warmer

SFG20 Schedule	90-03
Major Service	25 min
Minor Service	15 min
Safety Check	9 min



Coldroom

SFG20 Schedule	10-01
Major Service	135 min
Minor Service	45 min
Safety Check	40 min

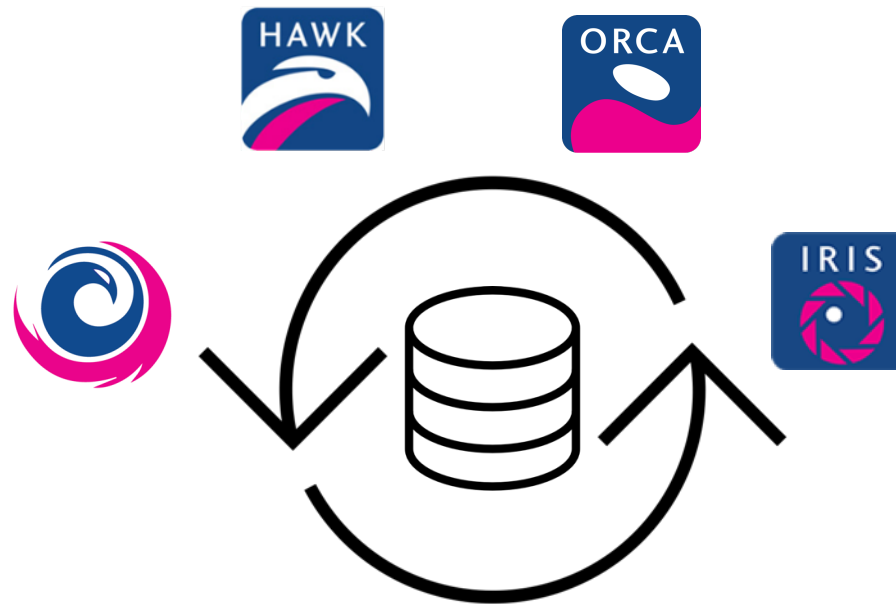


Phase 2

Business Insights



Centralised Data Approach



Dashboard & Reports

19 September 2021 15:15:22 MCFT

E R East Angles London East London West Midlands North North West South Central South Coast South Wales West Yorkshire

REMEDIAL ETAs Outstanding - CHASE

TeamName	Allocat edTeamEng	Site Name	Job Number	QDescription	ImportantNotes	Age of Job	ETA Set By	Set On	Days Since Available	ETA Date
London East	Mind	QnetIQ - Shoeburyness - Cantrien Servicing	220742	To attend site, supply and fit 1 x Defrost heater and 1 x Defrost probe, to the above unit.		41			37.00	
		Comelcus Vermoyden School	222883	To attend site, supply and fit 1 x Axial Fan, to the above unit.		6			3.00	
		CBRE - 5 Canada Square - Main	222120	Fridge, 2/3/4 do, FOSTER, - PREM1/3H S: E5103163 Mod T Asset No: 67848 Customer Asset No: - (asset 67848) To supply and fit 1 x condenser fan motor to the above unit, we would recommend replacing this unit if you would like a quote for new please contact us. (chromoxide dot prep) Failed item	prices need amending before invoicing if done in less hours - (P7 03/09)	16			2.00	
	Dhl	CBRE - Fidelity - 4 Cannon Street	220927	Fridge, 2/3/4 do, Foster - EPI/2H S: E5244724 Mod T Asset No: 127291 Customer Asset No: - (asset 127291) To supply and fit 1 x Mains lead to the above unit. (main kitchen)		39	Dhl	01 September 2021	23.00	17 September 2021
		Oracle London	223000	Freezer Upright, Williams, - LJ15A S: 815688 Mod T Asset No: 82143 Customer Asset No: - (asset 82143) To supply and fit 1 x Access valve rodarm, brace, carry out a pressure test, vac and recharge with 300g 404a. O/N to the above unit. Hot works required (5th floor)		5			2.00	
	CH & Co - Investor	30 Gresham St	223399	To attend site, to carry out cable replacement, to the above unit.		2				

14/09/2021 16:51:48

E R East Angles London East London West Midlands North West South Central South Coast South Wales West Yorkshire

All Date Last 1 Weeks (Calendar) 12/09/2021 - 18/09/2021

Name	Total Sign offs	% of Late Submissions	Number of Late Submissions	Avg Days Late
Gerard Hartigan	13	26.77%	8	1.50
Shaq Haynes	7	14.29%	5	3.00
Nigel Gardiner	15	13.33%	2	2.50
Garry Ferguson	10	10.00%	1	1.00
Chris Pyle	12	8.33%	1	1.00
David Bailey	13	7.69%	1	1.00
Ryan McDonald	15	6.67%	1	1.00
Kevin Foy	16	5.26%	1	1.00
David Hilton	17	5.88%	1	1.00
Nathan Vitoraro	17	5.88%	1	1.00
Alan McNair	9			
Andy Muskhale	17			
Anag Choudhary	7			
Billy Hopkins	14			
Callum Eade	13			
Chris Carter	13			
Craig Elford	14			
Craig Fyfield	11			
Daniel Carr	9			
Daniel Pour	9			
Daniel Sears	8			
Danny Mullis	20			
Gavin Campbell	10			
George Benson	10			
Total	664	2.32%	14	1.80

Name	32	33	34	35	36	37	Total
Nicolas Boullet	25.00%			25.00%	25.00%		25.01%
Gerard Hartigan	15.87%	15.87%	27.27%	27.27%			15.38%
Alan McNair	9.09%	10.00%					14.29%
Mark Mitchell	11.11%	10.00%		11.11%	10.00%		12.80%
Sam Ivoy	25.00%	13.89%					8.22%
David Bailey	11.11%	10.00%	9.09%	9.09%			8.06%
Chris Lancaster		25.00%	9.09%				7.14%
David Hilton		21.43%					7.14%
Peter Rybarczyk	8.33%		15.00%	7.14%	9.09%		6.43%
Walek Wilhelm				14.29%			6.25%
Shaq Haynes					14.29%		4.04%
Ryan McDonald	12.14%	16.87%			10.00%		8.97%
Marcon Romanan	12.50%		10.00%				5.68%
Nigel Gardiner			16.67%	9.09%		13.33%	5.33%
Chris Pyle				9.09%	9.09%		4.17%
Michael Davies	16.67%						3.57%
Nathan Vitoraro	11.11%					9.09%	3.13%
Billy Hopkins				12.50%			2.63%
Kevin Foy					9.09%		2.33%
Chris Carter		9.09%					2.04%
George Benson				100.00%			2.00%
Jack Gibbons					10.00%		1.96%
Garry Ferguson						16.66%	1.85%
Tony Clegg		9.09%					1.61%
Callum Eade				7.69%			1.41%
Danny Mullis				25.00%			1.35%
Total	3.64%	4.88%	2.21%	3.26%	3.47%	2.16%	2.99%



ORCA
Service Technologies



Private Demo

Select customer:

McFarlane Tyler Test

Logout

Feedback

KPI

KPI's

Welcome to the KPI screen. From here you can select a date range in order to see how our team as well as yours are performing in regards to your kitchen maintenance.

Start Date End Date

2015-01-01

2021-09-29

CALLOUT KPI's

1. Callout to Arrive

The time it takes our dispatch to arrive on-site from the moment the callout has been registered by the customer. Responsibility - MOTT

2. Arrive to Quote

The time it takes to generate the estimate (quote) of hardware after a callout has been discussed. Responsibility - MOTT

3. Callout to Quote - Total

This is the sum of the above processes combined.

4. Quote to Customer Order

From the time the quote has been generated to the moment the customer places the order. Responsibility - Customer

5. Customer Order to Completion

The number of days from when the order is placed to when the customer's work is complete. Responsibility - MOTT

Working days for each step (Elapsed days)

MOTT Responsibility

12.4
(18.6)

28.6
(44.5)

41.0
(63.3)

0.0
(0.0)

Customer Responsibility

1.0

Callout Logged

Callout to Arrive

Arrive to Quote

Quote to Customer Order

Customer Order to Completion

Completion

MOTT Time 100%

Customer Time 0%

Callout to Arrive

Arrive To Quote

Quote to Customer Order

Customer Order to Completion

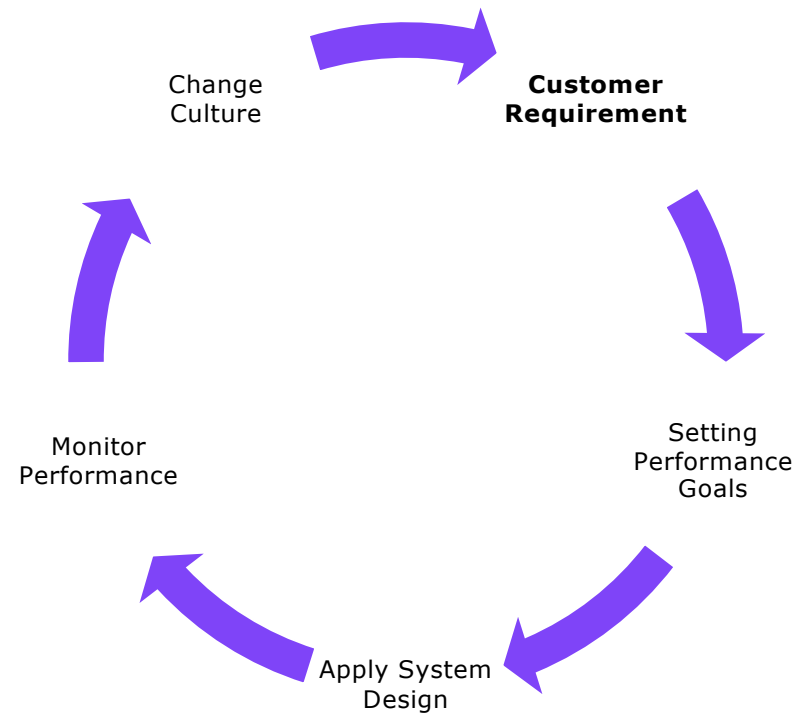


Phase 3

Shaping Behaviours



Shaping behaviours

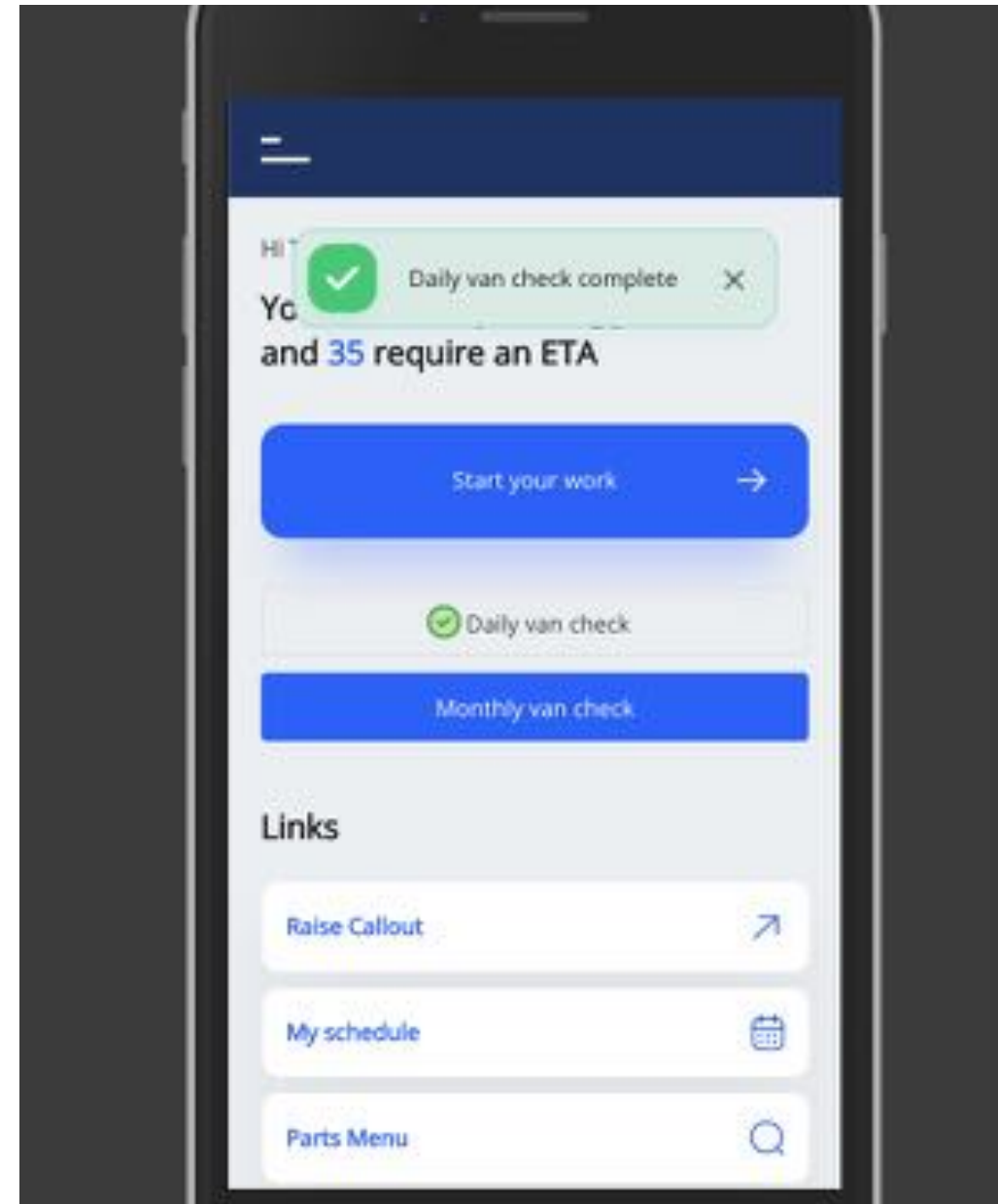


Van Checks

Choice Architecture:

Make it as easy as possible to do the right thing.

- Past performance:
28% missed daily van checks
- Performance with monitoring:
2% missed daily van checks
- New Performance:
0% missed daily van checks

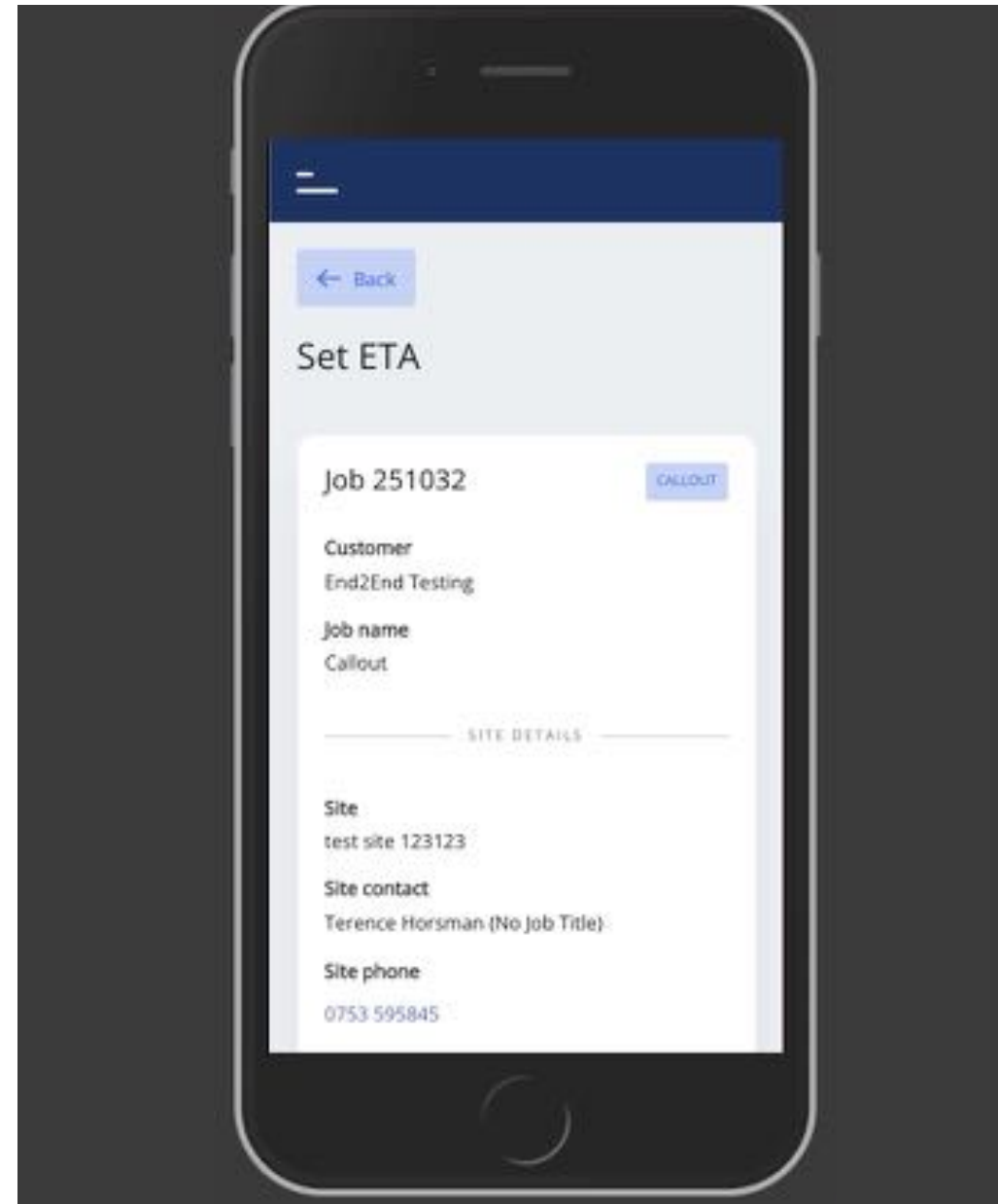


Setting ETAs

Choice Architecture:

Make it as easy as possible to do the right thing.

- Past performance:
Complaints from Customers
- Performance with monitoring:
Fewer complaints; Key offenders.
- New Performance:
No missed ETA



ORCA and SFG20

SFG20

Notes:

The person undertaking the leak test must determine whether the equipment is to be tested under the relevant task in this schedule for either HCFC or HFC gases depending on the refrigerant used in the system.

Display Order	Tasks
1	<p>Operation - general Criticality: Amber Frequency: 6M Skill Set: Multi-skilled</p> <p>Action: Check with the operator to confirm that the machine is working correctly and find out if there have been any previous problems with the unit or its operation. Check the physical condition of the equipment.</p> <p>Notes:</p>
2	<p>Door seals Criticality: Amber Frequency: 6M Skill Set: Multi-skilled</p> <p>Action: Check to see if the door seal is split or damaged. Replace if necessary. Check to see if the door seal has an airtight seal. Adjust where necessary. Clean and wipe down seals.</p> <p>Notes: The electrical supply to the equipment must be isolated, unplugged and confirmed safe, before carrying out this PPM check.</p>
3	<p>General Criticality: Amber Frequency: 6M Skill Set: Multi-skilled</p> <p>Action: Check the physical condition of the unit and suitability of the environment. Check cabinet for any external and internal mechanical damage. Check the condition of all fan safety guards, mountings and blades.</p> <p>Notes: The electrical supply to the equipment must be isolated, unplugged and confirmed safe, before carrying out this PPM check.</p>
	<p>Switches and connectors</p>

Interim Service

ITEM 507954

Asset Details

Asset Number

Asset Type

Coldroom Fridge (remote)

Make

Foster

Model

[Other]

Serial

Location

Kitchen

Condition

No

Complete Good Earth Test

☐ Pass

☐ Fail

Curtains - Check condition of Curtains

☐ Pass

☐ Fail

Installation - Is the unit installed to Manufactures instructions

☐ Pass

☐ Fail

Operational Test - Carry out a full operational test on the unit

☐ Pass

☐ Fail

Appliance Safe to Use?

☐ Yes

☐ No

Remedials Required?



Assuring Compliance through Tasks.



IRIS



- Raising Callouts
- Contacting MCFT
- Review Job Progress
- Review History
- Gain Insights

MCFT BETA
Kar (an email This is co...)

Search for anything

Home
Request Callout
Job Progress
Manage Assets
Insights
History
Useful Information
Log out

Request a Callout

[Back](#)

Asset details

Customer
Kar Test Customer April

Asset
2222 - Hob, Induction - Adventys - BRIC3000UK - 12345 - test location

Site
Kar Test Site April

Asset Number
2222

Make
Adventys

Model
BRIC3000UK

Serial Number
12345

Condition
No condition

Est Replace
Est / Rem / Rep

Location
test location

Callout details

Customer Notes

Fault

Site Contact Name and Number

Purchase Order No.

Select a PO to upload
[Choose File](#) | No file chosen

Your ref (optional)

[Reset](#) [Submit Request](#)

IRIS Next Steps - Timeline



Launch Demo





Home About Us Contact Us Services Pricing Testimonials

Get Started

Facility Service Software Reimagined

From vendor and hardware
management software, people
management, scheduling, to service
requests and more.



Our Features



**Vendor and Hardware
Management**
Manage all your vendors and
hardware in one place.



Scheduling
Manage all your service requests
and scheduling in one place.



[orcaserv.com/
service-
community](https://orcaserv.com/service-community)



ORCA
Service Technologies

Summary

- ▶ Happy Stakeholders
- ▶ Optimised
 - ▶ Customer Experience
 - ▶ Colleague Experience
 - ▶ Business Performance

Educating the Customer

Huge frustration – limits of customer aspiration



JLL Technologies

LIVE WEBINAR
Thursday, September 23

Struggling to get the most from your Archibus IWMS? You're not alone.

Join our Archibus Virtual Users' Group, and get deep insights into best practices and peer experiences.

[Register Now →](#)

API's

MCFT Admin

100%

100%

Search for anything

Home

Customers

Items

Service Desk

Products/Stock

Accounts

Management

Offline

Log out


Parts Lookup

Part name/sku

Search


First Choice

Standard	26.00
Extended	24.20
Stock	11
Delivery	3



GEV

Extended	18P12.A2
Stock	0 items in stock
Delivery	1-2 weeks
Label	Original Components Manufactured
Type	GC30

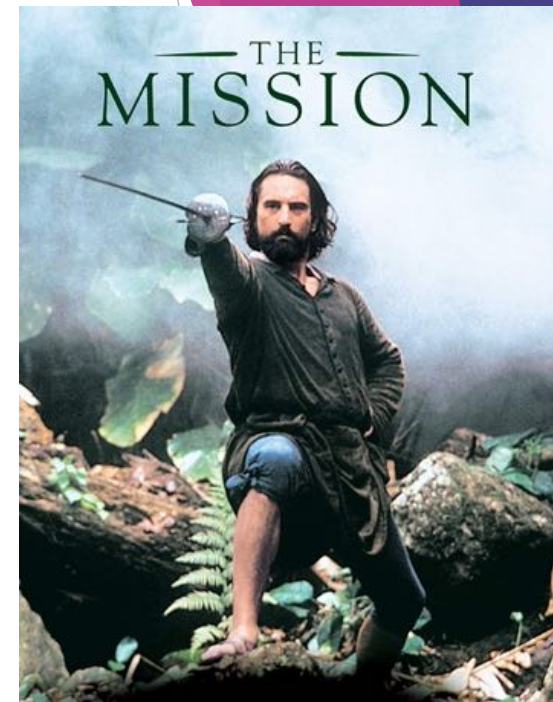


Order

Order Logins

Educating the customer

- ▶ Customer says “it’s about cutting costs”
- ▶ Most providers listen and go along – slashing standards
- ▶ Who stands up and talks Value ?
 - ▶ What you getting for what you’re paying
- ▶ In fairness, this is a niche, specialist service, how would the customer know?



Procuring Facilities Services

- ▶ How to specify services you don't understand?
- ▶ How to evaluate different vendors?
 - ▶ Assess internal expertise
 - ▶ Define desired outcomes
 - ▶ Invite proposals – RFX – including self-reporting
 - ▶ Test, challenge – substantiate: “how will this actually be delivered?”
 - ▶ Trial period
 - ▶ In-service monitoring

**CONSTRUCTION
MANAGER**

News

**Hackitt: 'Drive value engineering
out of construction'**

Post-Covid – birth of opportunity

“Never let a good crisis go to waste”

Winston Churchill

► Questions

► Chris Craggs

Terence Horsman



ORCA
Service Technologies

Field Service Solutions

Facilities Services Solutions
(FM & Multi-Site Estates)

Manufacturer Warranty Solutions