

WESTBROOK:

Field Service Transition

28th November 2019



YOUR SPEAKER: STEVE JONES

- SERVICE DIRECTOR @ WESTBROOK INTERNATIONAL
- 15 YEARS FIELD SERVICE EXPERIENCE
- 5 YEARS PLUS IMPLEMENTING SCHEDULING/MOBILE SOLUTIONS

WESTBROOK: WHO WE ARE



Dedicated Field Service Practice



9+/10 Custom Satisfaction



G-Cloud 11 & DOS approved supplier on the UK Digital Marketplace



Megabyte 2017 emerging star award for 'Best Performing Company'



Salesforce Ventures took a direct equity investment in Westbrook in 2011 & 2016.



Focused on:

- Field Service
- Manufacturing & Industrial
- Housing Associations
- Media & Communications



Delivered 1,000+ Salesforce based projects with more than 400 clients

WESTBROOK & SERVICE

photuris

LINX

QUBEGB™

Iba

DOMINO

SPP
PUMPS



KSS®
FIRE SUPPRESSION

DORMA

inca

tyco

orbis

xylem
Let's Solve Water

ABACUS
HEALTHCARE

iDSMED

aspect.co.uk
one call property care

HENRY SCHEIN®

BD

sedgwick®

Transition to Technology

Traditional Field Service

- Washing Machines
- Boilers
- Photocopiers
- Wind Farm Technology
- Lifts and Escalators



Transition to Technology

Field Service Within Housing

- Security Cameras
- Electrical Equipment
- Boilers/Radiators
- Intercoms
- Windows & Doors
- Fire Damaged or Vandalised Buildings





London property maintenance experts covering multiple trades 24/7

Need a tradesperson straight away? We can help...

I need a

Please select

Your postcode

eg N1

Check availability

Why choose Aspect for your property maintenance?

SOUTH EAST BASED PRIVATELY OWNED PROPERTY MANAGEMENT COMPANY

- Plumbing, electrics, heating, roofing, glazing, drainage, decorating, pest control...
- Routing and scheduling a white board 'challenge'
- Circa 150 vans on the road - London and Home Counties
- 50/50 Employee / contractors carrying inventory and purchasing stock for specific jobs 'on the go'
- High levels of 'customer stress' in Emergency call outs
- Trusted tradesperson-Home entry challenges
- One single view - in real time - of operations



KEY PERFORMANCE MEASURES FOR THE PROJECT

- Improve customer retention rates by 25%
- Reduce “telephone hang time” by 3 minutes
- Highly complex pricing and technician payment rules
- Remove the need to develop their Aspect proprietary app
- Reduce credits
- Increase visits per day
- Be seen as a disruptive force in the industry through use of technology



TECHNICAL SOLUTION

- Salesforce Service & Community Clouds provides the platform
- Knowledge base set up - easy access to critical information about the client and inventory
- Asperato™ integration for billing and technician payments
- Highly complex pricing solution customisation
- Integration to 123 Formbuilder tool for completing complex forms such as Carbon Monoxide testing
- Mobile device interface crucial to success for operator and customer

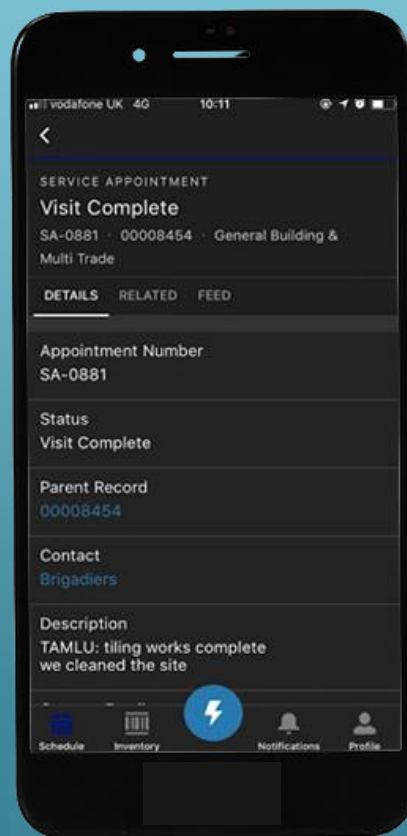
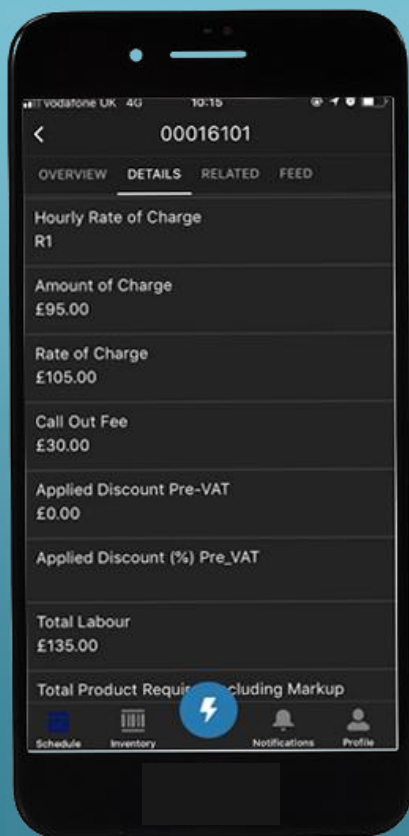




Customer Success Platform



Mobile Data – Highly Customisable (click not code)



Contractors and BYOD Employees



MY SERVICE APPOINTMENTS

APPOINTMENT NUMBER	STATUS	ARRIVAL WINDOW START	ARRIVAL WINDOW END
SA-5808	New		
SA-5809	New		
SA-5811	Cancelled		
SA-5822	Complete and Invoiced		
SA-5842	New		
SA-5843	New		
SA-5844	Visit Complete		
SA-5845	Action Required		
SA-5846	New		
SA-5847	New		

Sort by:

Most Recent Acti ▾

🔍 Search ...



CJ0035 — [Thaisa Buzzi](#) created a complaint.

16 September 2019 at 15:54



CJ0035

[View more details](#)



Like



Comment



Write a comment...



CJ0033 — [Thaisa Buzzi](#) created a complaint.

16 September 2019 at 15:45



Contractors and BYOD Employees



Engineer Payroll
EPN-0000002095

Summary Section

Material Net Pay

0.00

Money Held on Leaving / Refund

0.00

MV Insurance Withheld Refund

0.00

MV Repair Deduction / Refund

0.00

Retention Net

0.00

Parking Fine Deduction / Refund

0.00

Phone Deduction/Refund

0.00

Bank Charge/ Refund

0.00

Congestion Chg Exp Reimburse

0.00

Mobile Repair Refund

0.00

PL Insurance Deduction/Refund

CIS Charge

0.00

Pre VAT

206.25

VAT Formula

41.25

Post VAT

247.50

Gross

206.25

Refunds

0.00

Deductions

0.00

Final Payment

247.50

Gross Pay

206.25

Net Pay ⓘ

206.25

Advantages of Self Service Portal

- Contractors pick up work when they/you want within a managed portal
- Licence model on a “count down/per usage” basis
- Secure environment
- Overflow facility
- Reduced overheads



Phase 2

- Self service community based portals
 - Direct booking window for customers
- Marketing cloud to drive up lead generation and reduce Google ad spend
- FinancialForce replacement for ageing existing solution



Leaders in vacant property and people protection

Leading property and site solutions delivered nationally 24/7.
Orbis continue to innovate, invest and lead since 1981.

GET IN TOUCH

FIND OUT MORE



ABOUT ORBIS

- Nationwide vacant building management services
- Local Authority focused
- 140 technicians
- No current point and click solution
- Scalability and speed to market challenging
- No ability for Self Serve



KEY PERFORMANCE MEASURES FOR THE PROJECT

- Hearts and minds basis for field based users
- Improve mobile device usability
- After normal working hours local authority support desk
- Improvement within contractor response times
- Improvement in visits per day of field based staff
- Complex “Form” creation for H&S purposes



Customer Success Platform



Management of Customer “Keys”

Policy: Customer First

2h 45m 9h 4m 0/3 3 0

All Service Appointments

Match Gantt Dates

1-63 of 63, 0 selected

Search Service Appointment...

APPOINTMENT	STATUS	PROPERTY ASSET EMERGENCY
SA-0820	Dispatched	false
SA-0978	In Progress	GILLINGHAM B... false
SA-1055	Scheduled	1, Wilton Close... false
SA-1040	Completed	South, 22, Old... false
SA-1093	Completed	Brilliana House... false
SA-1105	In Progress	Cube Real Estat... false
SA-1108	In Progress	1, Wilton Close... false
SA-1146	Scheduled	1, Wilton Close... false

Wed, 23 October 2019
Today
Daily

00:00 01:00 02:00 03:00 04:00 05:00 06:00 07:00 08:00 09:00 10:00 11:00 12:00 13:00 14:00 15:00 16:00 17:00 18:00 19:00 20:00 21:00 22:00 23:00

South East Dartford Utilization 0% Europe/London - Wed, 23 Oct 2019 09:30

Alan (Secondary) alan Crew Member

Alan CREW

South West Dartford Europe/London - Wed, 23 Oct 2019 09:30

Alan alan Crew Member

Dashboard
Key Access Dashboard
 As of 22-Oct-2019 16:21 Viewing as Fed Cardless
 Service Territory: Name



The list below contains upcoming scheduled appointments that require a Key Pick Up or a Key Return.

Viewer: Aflane Flits
 Viewing: Dartford
 Period: 23 October 2019 - 23 October 2019
 Filtered Resource: Alan

Keys Required

- SA-1232 - JLS (Scotland) (Planned Start Time: 10:45 Planned End Time: 11:45)
 Key Pick Up Details: Conclerge, Kent Building - Mulberry Place, Town Hall, 5 Clove Cres, London E14 2BG
 Property: Flat 510, Grantham House, 46, Botanic Square, London, E14 0LW - Botanic Square London E14 0LW

Return Required

- SA-1232 - JLS (Scotland) (Start Time: 10:45 End Time: 11:45)
 Key Return Details: JLS Keys 2 - John Onslow House, 1 Ewart Pl, Row' London' E3 5EQ
 Property: Flat 510, Grantham House, 46, Botanic Square, London, E14 0LW - Botanic Square London E14 0LW

To create an appointment, select appointments from the list above and then populate the fields below. An appointment will be created and assigned accordingly.

* Location

* Assigned Resource

* Start Date

* End Date



Bond will help us deliver more affordable homes across South West

[▶ Find out more](#)

Quick links

[My Account](#)

[Repairs and home help](#)

[Pay my bill](#)

[Home finder](#)



New homes

Homes to buy including shared ownership

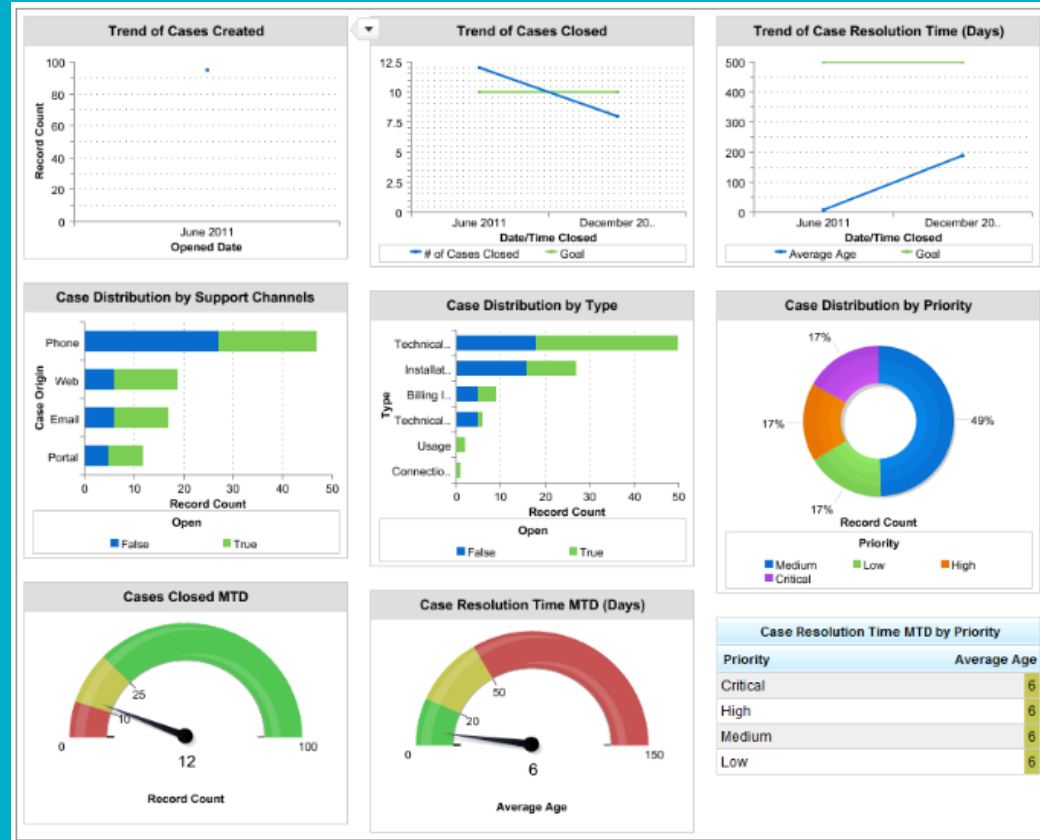
[View homes](#)

- Deliver account balance and rent statement information to customers
- Allow customers to raise and monitor requests for repairs in and around their property
- Enable prospective customers to review and submit applications and supporting documents for advertised new homes

The screenshot displays the LiveWest website interface. At the top, there is a navigation bar with the LiveWest logo, a search bar, and a user profile for 'Joe Bloggs'. Below this is a secondary navigation bar with links for Home, My home, Applications, Make a payment, Check rent balance, Repair request, Track a repair, Help and advice, and My profile. The main content area features a large video player titled 'What is Shared Ownership?' with a play button and 'Watch later' and 'Share' options. Below the video is a text description of shared ownership: 'Shared ownership, also known as part rent part buy, is a way to help people get onto the property ladder. You buy a percentage of a house and pay rent to LiveWest for the remaining share. This means smaller deposits, smaller mortgage, and the rent you pay on the remaining share is charged at a discounted rate.' A 'Find out more' link is positioned below the text. To the right of the video are six service tiles: 'New homes to buy', 'Shared ownership application', 'My housing officer', 'My income manager', 'Support for you', and 'Be money ready', each with a representative image.

Reports and Dashboards

- INCLUDED within the package
- Service and Field Service IS measurement
- Easy to build at management level
- Define your own metrics
- Trending....



Product Meets Industry

- Field based tracking of staff via calendar based planning
- Maintenance Planning
- Mobile functionality/Route Planning
- Contracts with maintenance planning
- Customer and Contractor portal
- Payment processing
- Surveying of visit



QUESTIONS?

