

2021 

INTELLIGENT SOLUTIONS FOR  
WORKFLOW AUTOMATION



# Case Study

USE CASE

  
Food Preparation Company



# CASE STUDY

## THE CLIENT'S STORY

Rebecca turned on the television to get the latest news. Really, it was to get the latest figures ... it was only ever going to detail the number of cases and sadly, the number of deaths,

That Rebecca was able to have the television on at this time of day was a novelty in any event. Normally, this time of the day was one of the busiest.

Rebecca thought about the depot where she would normally be right now, supervising the loading and departure of food and meals for the Company's different locations.

This was when Rebecca realised how many mouths her company fed every day and the hustle and bustle of people moving pallets and boxes through the cold supply chain made her feel part of something great.

Now, the depot sat silent. Empty.

The orders from the Government meant that no-one would be going into the building for the foreseeable future. This was a surreal period that everyone was living through and Rebecca wondered how long it would continue.

Rebecca ran through her list of tasks on any given day and she stopped walking around the kitchen once she reached one.

Without the necessary daily temperature checks on their food storage facilities, they would have to throw away all their freezer and refrigeration units' contents. That was hundreds of thousands of pounds of food.

## THE CLIENT'S STORY

The process seemed somewhat antiquated in any event. When she thought of all the time and effort that was spent optimising the supply chain and operations of the Company - data collection, analytics, reports - the temperature checks were from another era.

Rebecca, or one of the team, would literally walk the rows of refrigeration units and freezers, check on the temperature levels and record them. As long as the temperature levels were consistent and above the required level, that was ok. If they were not - if the the readings were varying considerably or below a certain level - then further investigation was required. Normally this further investigation was done by maintenance contractors.

Rebecca dd not get involved in the work order issuance, there was a separate team that would handle all the maintenance and management of the site and equipment.

Whilst this was normally not a problem, Rebecca also knew that sometimes the wrong engineers would be sent or that money was wasted by sending engineers on a reactive basis when the equipment was covered by a warranty.

Whilst this was not part of Rebecca's budgetary responsibility it did sometimes impact her team because this was money that could be saved and would often cause more blanket restrictions on all maintenance spend.

When Rebecca thought about all the person to person communication and reliance in their workflow process it just reinforced her feeling that there must be a more robust way of handling these operations.

The music for the news started and Rebecca turned back to the TV, suddenly other supply chain issues - those for the vaccine distribution - occupied her thoughts.

# 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 available for Rebecca and her colleagues in solving the above (and other issues) in this food preparation and distribution business:

## IOT SENSOR INTEGRATIONS

Replacing manual processes with automated data collection offers Rebecca's company a return on investment in a number of ways:

- Time required for manual checks can be used for other work on site
- Consistency of data collection and recording is improved because it is not reliant on any other requirements or employees' workloads
- Mistakes are reduced or eliminated
- The ability to use the collected data is enhanced since it is already in a digitised form and able to be queried or indicate trends
- Can form the basis of additional workflow automations by creating standardised jobs, tasks or work order issuance based on rules assigned to collected data

## WORK ORDER TEMPLATES

Variability in the quality or content of work orders issued can have a huge impact on the reliability of machines and equipment, as well as the costs associated with their maintenance.

Cleverly allows Rebecca to create bespoke work order templates based on the type of work to be carried out. This can mean that periodic inspections are undertaken on the same basis and capture a continuous series of data or it can mean that the same warnings or risk assessments are provided based on certain locations or equipment type.

By tying work order templates to the sensors, depending on the data readings that are received, different types of service visits (or different engineers) can be assigned. Just another way of improving the efficiency and consistency of service delivery.

## PLANNED MAINTENANCE

Rebecca's colleagues are 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:

- 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

## REACTIVE MAINTENANCE

Even with a robust planned maintenance program, ad hoc issues will always emerge and require attention. When the issues relate to food safety and mean that wastage and spoilage can be avoided, timely issuance of work orders and attendance by engineers is all the more important. The Cleverly platform handles reactive maintenance with ease, whether this be in-house engineers or an external supply chain.

With an unlimited number of service lines able to be pre-populated or edited to fit your needs, the system allows you to deal with different priority levels (P1 - P5 as standard) with rates to customers (if appropriate) 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:

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

Rebecca can also utilise the triage solution which means that custom questions can be added to particular jobs or job types. This allows information to be gathered so as to increase first fix rates, as well as minimising call out costs if there are issues that can be fixed by on site staff with sufficient knowledge.

## FIELD MANAGEMENT

Rebecca's company uses a mix of both in-house and external engineers. Using the workflow automation rules, Rebecca can have certain jobs routed to internal staff as opposed to the external supply chain. Cleverly allows Rebecca to provide the Company's supply chain with a mobile and web application that will:

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

## CUSTOMER & SUPPLIER COMMUNICATIONS

Cleverly provides Rebecca's company with the ability to centralise and organise communications between staff 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 and hampered the office's efficiency on a daily basis.

Cleverly offers Rebecca a single source of truth where the team can communicate with engineers and each other. Whether this is relating to an uplift request or access information, all communication is stored as part of the job 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.

## DATA & ANALYTICS

Within data is contained information. From information, you can draw insight. Now, Rebecca can instantly obtain data from the system and use it for her and her colleagues' decision making.

The Company now has the ability to spot anomalies in spending as well as highlighting to them data that may be a leading indicator of other or associated problems. It will 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 you to move from instinct to insight.

## CUSTOM REPORTS

As Rebecca's Company digitises processes, this also provides the ability for them to more easily stay on top of operating metrics, both internally and externally.

Cleverly's custom reporting capabilities provide Rebecca with a 'snapshot' of how her and her team are performing and allows them to customised for different purposes and recipients.

These can be set up to send for example on a weekly basis so you can stay on top of baseline levels and more easily spot anomalies or identify issues which require further investigation.



## 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, Rebecca and her colleagues can address issues early.



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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