

# LES PROCESSUS CLÉS



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# **Le processus du service**

## The Field Service Process

### Field Service Process Objectives & Metrics

Top-level items are process objectives, second-tier items are metrics meant to predict success in achieving the objective.

1. Achieve the goal of \$3.3M in service + parts revenue for 2025 (\$1.1M in 2023, \$1.9M in 2024)
  1. Technician qualification targets (# of technicians qualified per level?)
  2. Weekly service labour quoted (target t.b.d. based on observed conversion rates)
  3. Weekly service parts quoted (target t.b.d. based on observed conversion rates)
  4. Weekly service labour GP closed (> 1% of annual target sales)
  5. Weekly service parts closed
  6. Weekly service labour GP (> 1% of annual target sales = \$11k per week in 2023, \$19k in 2024, \$33k in 2025)
  7. Weekly service parts sales (> 1% of annual target sales)
2. Maintain a high degree of satisfaction with existing service clients (NPS > 90).
  1. Weekly mean time to quote standard service (< 48h)
  2. **Weekly** mean time to quote non-standard service or service contracts (< 5 working days)
  3. Weekly mean time to respond (24h for non-urgent contract client demands)
  4. Weekly number of revisits (target 0)
3. Maintain excellent cash flow
  1. Time to invoice service visits < 2 working days
  2. Inventory turnover > 4 (measured as parts CoGS / average parts inventory for a period)
  3. Average time to complete work order after service date (target t.b.d.)

### Field Service Process Outline

1. Responding to requests for recurring service from existing clients:
  1. The recipient forwards the request to the customer service team. The request may come in directly from a client our external partner or may be generated internally as a visit follow-up.
  2. CS quotes the job based on standard service products or historical sales to the client and submits the quote to the service manager for approval.

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3. The service manager reviews the quote and sends it to the client once it's ready.
2. Respond to requests for non-recurring jobs
  1. The recipient forwards the request to the sales team. The request may come in directly from a client our external partner or may be generated internally as a visit follow-up.
  2. Salesperson is assigned and qualifies the opportunity: problem fit, timeline fit vs. availability, decision-makers, budget, etc.
  3. Salesperson quotes the opportunity if qualified, with estimation help from technicians and (if needed) service manager. Service manager may be asked to fill annex C and review annex D.
  4. Service manager approves the quote prior to sending (or requests adjustments).
  5. Salesperson closes the deal (gets a PO). If the client is known and has an extremely good track record, the process may proceed with only an email confirmation / acceptance of the quote. New clients must send a PO.
3. Planning and coordinating visits
  1. Customer service rep reviews the PO on receipt and confirms the sales order. Good service clients may have their SOs confirmed prior to receiving an official PO.
  2. Once a PO is received (or an SO is confirmed without a PO for good clients), service manager adds the visit to the planning pipeline. In the case of service contracts, all the upcoming visits are added to the pipeline with approximate execution dates.
  3. Service manager creates or updates the client's service folder, including the creation of the service schedule spreadsheet ("Grille de planification").
  4. Service manager ensures POs for parts are placed and estimated delivery dates are known.
  5. The logistics agent sets stock aside or ships it, based on the transportation method indicated on the delivery order created from the confirmed service sales order.
  6. Service manager confers with the client to document any special requirements such as on-site training, health & safety requirements, or other preparation work to do prior to the visit.
  7. Service manager selects a date for the service visit and proposes it to the client, along with what the client will need to prepare for the visit (system shutdown, access to drain, etc.). Ideally the service manager waits for parts to be on hand prior to scheduling the visit, but may decide to book prior to reception in some cases.
  8. Client selects a date and service manager confirms it in the service calendar (tentative until all parts received).

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9. Service manager creates the work order.
  10. Service manager confirms the visit (or returns to step 3.c. if it needs to be moved): this includes making sure all stock is ready to go and that technician and client are still available. (currently client notification is being handled by Customer Service rep as a stop-gap measure)
  11. Service manager communicates upcoming visits, expectations, parts requirements, etc. to the technicians during the weekly service planning meeting.
4. Service visit execution
    1. The field service technician prepares vehicle, tools, parts and equipment based on the work order.
    2. The field service technician reviews the work to be completed, including visualizing the steps required to make sure there are no knowledge, material or compliance requirement gaps.
    3. The field service technician performs the work.
    4. The field service technician completes the work order: tasks completed, parts used, time spent.
    5. The field service technician provides a copy of the work order to the client and has the client sign a copy for Durpro.
    6. If follow-ups are required, the field service technician fills out a Request for Quotation and submits it along with the work order to the service manager.
5. Service visit follow-up
    1. The service manager reviews the completed work order and plans future work as required: new sales opportunities added to the pipeline, new service interventions added to the planning pipeline, etc. He also adds any post-mortem items to the issues list or feedback points to be discussed at team meetings. RFQs are completed and forwarded to the sales or CS team for follow-up (see steps 1 and 2).
    2. The service manager sends a copy of the completed work order to the client and advises that the invoice will follow shortly.
    3. The service manager updates the sales order with the "delivered" quantities and creates a draft invoice from the sales order.
    4. The accounting technician reviews, validates and sends the invoice. If the client's payables department asks for the work order, the service manager sends them a copy.
6. Service inventory management
    1. Inventory is kept in a variety of bins based on intervention types.
    2. Service technicians are responsible for noting parts used on work orders.
    3. The service manager completes the stock moves noted on work orders in Odoo.

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4. Draft POs created automatically for min/max orderpoints or confirmed sales orders are reviewed by the purchasing clerk (and, periodically, the operations manager). Should there be any questions with respect to the part to order or the required timeline, the purchasing clerk asks the service manager for more information.
  5. The service manager carries out and completes inventory operations for bin replenishment.
  6. The purchasing agent places purchase orders based on (purchasing) RFQs, keeps projected delivery dates updated and follows up with suppliers as necessary.
  7. Bin inventories are counted quarterly by the service team to keep counts as up-to-date as possible.
  8. The service manager makes stock orderpoint (min/max) adjustments based on observed parts-availability induced bottlenecks. The adjustments are expected to be cash-flow positive based on the [Stocking Order Cashflow Tool](#). (currently also being done periodically by the CS + Logistics manager and the Ops manager)
7. Annual adjustment of the service offering (new)
1. The service manager sets the date for the formal service offering review.
  2. The finance & administration manager (CFO) prepares reports on profitability by client and service product.
  3. The service manager makes recommendations about which service products to be prune from the offering.
  4. The service manager proposes a list of price adjustments with justifications.
  5. The service manager proposes a list of new service products to add to the standardized offering.
  6. The management team meets for the formal service offering review, discusses and decides which recommendations to adopt, including new recommendations that are proposed during discussions.
  7. The service manager updates the appropriate documents (service terms and conditions) and products (in Odoo).