**Procedures to Work with COVID-19 Restrictions**

# Table of Contents

[Table of Contents 2](#_Toc38609466)

[Document Control 4](#_Toc38609467)

[Purpose 5](#_Toc38609468)

[Scope 5](#_Toc38609469)

[Definitions 5](#_Toc38609470)

[Associated Documents 5](#_Toc38609471)

[Procedure - Company Position 6](#_Toc38609472)

[Alert Levels 6](#_Toc38609473)

[Specific Procedures 8](#_Toc38609474)

[Procedure – Operating Units 11](#_Toc38609475)

[Sales (Dean Brown) 11](#_Toc38609476)

[Equipment Sales 11](#_Toc38609477)

[Equipment Sales Administration 12](#_Toc38609478)

[Accounts Receivable and Accounts Payable 12](#_Toc38609479)

[Corporate (Grant Whitelaw) 14](#_Toc38609480)

[Finance and Commercial 14](#_Toc38609481)

[Payroll 14](#_Toc38609482)

[People and Culture 14](#_Toc38609483)

[Health Safety and Sustainability 14](#_Toc38609484)

[Senior Management 15](#_Toc38609485)

[Terra Industrial Finance 15](#_Toc38609486)

[Partner Services (Darren Sandford) 16](#_Toc38609487)

[Customer Support Centre 16](#_Toc38609488)

[Asset Management and Connectivity 17](#_Toc38609489)

[Condition Monitoring Advisors 18](#_Toc38609490)

[Marketing 18](#_Toc38609491)

[Partner Services 19](#_Toc38609492)

[Productivity Services 19](#_Toc38609493)

[Terra Analytical - Administration 20](#_Toc38609494)

[Terra Analytical - Laboratory 20](#_Toc38609495)

[Terra Analytical - Interpretation 21](#_Toc38609496)

[Parts Operations (John Gillman) 22](#_Toc38609497)

[Parts Operations 22](#_Toc38609498)

[Warehouses/Distribution (John Gilman) 23](#_Toc38609499)

[Service (Stuart Thornley) 24](#_Toc38609500)

[Service Operations 24](#_Toc38609501)

[Tech Services 24](#_Toc38609502)

[Warranty 24](#_Toc38609503)

[Workshops 25](#_Toc38609504)

[Field Service Technicians 26](#_Toc38609505)

[Component Rebuild Centre (CRC) 27](#_Toc38609506)

[Power Systems (Greg McCarthy) 28](#_Toc38609507)

[Territory Sales Staff 28](#_Toc38609508)

[Sales Administration 28](#_Toc38609509)

[Projects and Engineering 28](#_Toc38609510)

Document Control

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Date** | **Updated Version Number** | **Marked Version** | **Change** | **Changed by** |
| 23.4.20 |  | 0.9 (22.04.20) | Added outward visitor information under Level 3 | Stephen Frayle |
| 24.4.20 | 1.0 (24.04.2020) | 0.9 (22.04.20) | Added document control.  Amended interregional text in Company Alert Level 3. | Stephen Frayle |

# Purpose

The purpose of this procedure is to provide a view of how business can be conducted at the 4 Alert levels formed by the New Zealand Government

It shows what functional tasks are required to transition between each level.

# Scope

This procedure provides information on a macro level for the company as a whole, and then in a similar format looks at each broad functional section and their individual operating units.

# Definitions

**Available Staff**

Available Staff are those staff members who are capable of working.

It is important to understand the type of availability.

A staff member may be available as Remote Staff but not Active staff due to underlying health concerns; or may be available as Active Staff but not Remote Staff due to a lack of technology or infrastructure, or the type of work that person performs.

**Active Staff, Operational Staff**

Active Staff means staff who need to be active in the market. They are required work on a work site whether it belongs to Terra or a customer.

**Remote Staff**

Remote Staff can work in isolation. They can complete their roles without physically interacting with any other staff or community member.

# Associated Documents

The following documents are all stored in the SharePoint directory located HERE

* COVID-19 Alert Level Summary
* Procedures to Work with COVID-19 Restrictions
* L3 COVID-19 Work Procedures
* COVID-19 Health Procedure
* “Right to Start” Check List
* COVID-19 Work Procedures
* Branch site plans

# Procedure - Company Position

## Alert Levels

### Expected position under Level 4

* Able to conduct business for “Essential Services Only”
* All non-essential staff are at home
* Workforce has been scaled to match workload
* Essential staff are working in shifts
* Customers are willing but unable to conduct business

### Expected position under Level 3

* Terra will be able to conduct business for all purposes
* All non-operational staff will remain working from home
* The workforce may continue to be scaled to match workload
* Operational staff continue to work on-site in an AM and PM shift.
* Operational staff who are in the high COVID-19 risk bracket will need to be managed to stay isolated from the bulk of the staff.  
  More staff on-site will require better and stricter compliance with health and safety protocols particularly as relates to:
  + Social distancing where possible
  + Wearing PPE
  + Personal hygiene and practices
  + Managing high risk activities
* On site drills will be held for operational staff detailing actions required:
* If the site is advised a staff member has tested positive for Covid-19
* If a staff member comes to work sick.
* A suitable space for a sick employee to wait should be set up in each centre
* Scripts will be provided for staff detailing what to say and do when:
* A staff member calls in sick describing symptoms of Covid-19
* No inter-regional travel is to be undertaken (land or air) unless approved via the Senior Management approval process.
* Face to face contact with customers/visitors is not permitted.
* Customers may collect goods by agreement from predetermined collection points.

#### Long Term position (beyond 6 weeks)

* Remote staff may need additional equipment, i.e. office chair, extra screen, desk etc.
* The business may need to look at compensation for long term use of people’s homes and resources.
* Insurance will need to be addressed regarding cover for work equipment. May not be covered under personal home and contents policies.
* Home work station assessments will be required

### Expected position under Level 2

* Able to conduct business for all purposes
* Social distancing protocols remain in place.
* Non-Operational staff will be split with half working from site and half working remotely in order to better accommodate social distancing protocols around desks and workspaces.  
  Rosters will swap locations each week or as required.
* Higher risk staff will still need to be managed to stay isolated from the bulk of the staff
* At this Alert Level the whole workforce should be fully employed.
* Operational staff continue to work on-site in shifts
* No non-essential travel
* Customers will be conducting non-essential business
  + Customers and staff must still maintain separation by physical distancing.
  + Customers access to the warehouse or workshop areas is limited to an exception basis only.
  + Visiting customers should call ahead and make an appointment.
  + Locations should maintain a customer visiting area separating most customers from operational staff.
  + Staff should maintain a logbook detail visitors names, employer, contact details, time on site, purpose of visit. This should not be filled out by the visitor.

### Specific actions required - L3

**Before work commences**

* Advise staff whether they are to work remotely or at Terra facilities
* Ensure all staff are familiar with all the safety and operations protocols for Level 3
* Ensure all staff have access to all required information and communication channels.
* Complete all pre-work checklists required by safety protocols.

This includes remote staff assessing their home environment (correct equipment / setup)

* Ensure People and Culture are advised of all active staff details with work rosters; as well as any which staff will be on site and off site.

**Day 1**

* Complete “Right to start” checklists as required for each operational unit
* Check in with staff to ensure they understand what they are to be doing and why.
* Begin implementation of anything identified as needing attention.

## Specific Procedures

### Standard Shift Policy for Terra Work Sites

* The standard Terra shifts are as follows:
  + AM Shift = 5:00am – 1:30pm
  + PM Shift = 2:00pm – 10:30pm
* All Terra staff will be assigned a shift for the times they need to be on a Terra site.
* Staff can only be on one shift and may not switch between them.
* All staff members are only permitted on a Terra site during their shift time.
* Staff working remotely on standard work hours must ensure any Terra site visit happens entirely within their assigned shift.
* When it is not practical to be on site at 5am and it is reasonable to do so, with approval a shift may start later (morning) or earlier (afternoon) with the nonstandard time being worked remotely. Example (7am start time through to 1:30pm on site, then additional 2 hours worked form home – travel time not included).
* Where multiple people are in a role on the same site (ie Heavy Diesel Technicians) staff numbers need to be split between shifts, biased no more than 60/40 in either direction.
* Each shift roster for operational areas is required to also have/indicate
  + a Safety Rep;
  + a Medic;
  + a Warden

### Between Shift Cleaning Procedure

* Branches are currently responsible for their own cleaning between shifts.
* At the end of the first shift staff are expected to spend time cleaning their workspaces, (desks, surfaces, shared tools, door handles etc)
* At the start of the second shift, staff are expected to assume everything is dirty and reclean all the surfaces, tools etc which they will be using.

### Standard Workspace Policy for Terra Work Sites

* All operational units are to have and operate in their own predefined workspaces
* Staff members are not to enter the workspaces of other operational units.
* Where workspaces are unavoidably connected they may be crossed, exiting the area as quickly as possible with nothing in the workspace being touched.
* A register should be kept for all staff entering the premise in each shift. This is important for staff members on site who do not maintain timecards.

**Workspace Policy for Shared Terra / Transport Work Sites**

* Refer individual branch site plans

### Visiting Policy

#### Level 3

##### Inward Visitors

* No visitors are permitted in Terra premises
* Visitors can be on site only to collect equipment or parts.
* There is to be no face to face interaction between staff and visitors

##### Outward Visitors

* Staff can only visit customer sites for specific work requirements (no casual visits)
* Physical distancing protocols must be maintained.
* All visits must be planned, and staff must call ahead to announce their arrival.
* Customers site requirements must be received in advance and adhered
* Staff must keep their own log of where they have been and the name and contact details of all people who they have been in the proximity of; for the purposes of contact tracing.
* If possible, staff should photograph any visitors register the sign in to understand who else has been on the site they have visited.

#### Level 2

##### Inward Visitors

* Visitors and staff must always maintain separation.
* No visitors are permitted in the warehouse or workshop areas.
* Visitors for specific staff must do so by appointment
* All customers interactions on a site must be in a specific customer meeting area
* Drop in customers are to be triaged only allowing 1-2 into the Visitor area at a time depending on size and location.
  + Additional customers are to be given a number and asked to wait in their vehicle.
  + Staff can text them when they can enter the building.

##### Outward Visitation

* Staff may choose to visit customers off site but must still maintain social distancing protocols.
* Staff must call ahead to announce their expected arrival.
* Staff must keep their own log of where they have been and the name and contact details of all people who they have been in the proximity of; for the purposes of contact tracing.
* If possible, staff should photograph any visitors register the sign in to understand who else has been on the site they have visited.

### Equipment Delivery Policy

#### Level 3

* Machine delivery cannot be completed as per normal due to rules prohibiting interactions with customers during Level 3.
* While these changes are restrictive, it is important that you still recognise this as a special day for the customer and ensure they know their business is appreciated.
* Think through how you will complete your delivery and what you can do to make sure it still adds value and recognises the customers decision to purchase from us.
* Regardless of circumstance, you must always maintain physical distancing of 2m.
* Nothing can be handed to, or received back from the customer; so all signed paper work needs to be sent via email, printed, signed, and scanned back. (We are looking to introduce Docusign shortly to make this process easier).
* You cannot carry out a hand over or interact with the customer face to face at all, so the machine needs to be paid for and picked up only.
* Gifts to customers cannot be handed to the customer, they must be sent.

#### Level 2

* Machine delivery cannot be completed as per normal due to active physical distancing rules.
* While these changes are restrictive, it is important that you still recognise this as a special day for the customer and ensure they know their business is appreciated.
* Think through how you will complete your delivery and what you can do to make sure it still adds value and recognises the customers decision to purchase from us.
* Explain these rules to the customer when arranging the delivery; while frustrating, it is important to remember that these changes are to keep you, your families and your customers safe.
* You must always maintain physical distancing of 2m.
* If you operate the machine, when you exit, all surfaces must be cleaned down with a suitable disinfectant and you must apply hand sanitiser.
* Nothing can be handed to or received from the customer, so all paperwork signing needs to be sent via email, printed signed and scanned back.
* You cannot stand on the track/ladder/blade etc while a customer sits in the cab to give instructions or advise on controls/switches or operation advice.
* You must keep a log of all people you meet on site or in the workplace during delivery including any transporter driver.
* You cannot climb up on top of machines to show oil fill, points dipsticks etc unless a 2m distance can be maintained.
* Use hand sanitiser on completion of the delivery.
* Gifts to customers cannot be handed to the customer, they must be sent.
* No handshake at the end.

# Procedure – Operating Units

# Sales (Dean Brown)

## Equipment Sales

Territory Account Managers, operate out of their vehicles visiting customers generating opportunity, selling and delivery of equipment.

This includes staff from:

* Mining Sales
* Equipment Sales
* Rental Sales
* PSSRs

### Position at Level 4

Technically all sales staff are inactive.

While on leave they can keep in contact with their clients, and keep up to speed with what’s happening in the market

### Position at Level 3

TAM’s are all active

All Sales staff will continue to operate remotely either from home or their vehicles.

New sales opportunities can be sought and signed.

Machines can be delivered in accordance with the Equipment Delivery Policy

Any site visits are only as absolutely required and must confirm to Terra and Construction site protocols.

All travel is to be in the local area.

### Specific actions required - L3

**Before work commences**

* TAM’s are to check in with their customers and confirm expected delivery dates for all active sales orders.
* Alternate methods of working to be explored ie Docusign
* Training – appears to be some anomalies in the training data provided. David to work with Jenny to get sales rep training matrix up to date.
* Meetings –One formal meeting per week for GM Sales and all direct reports.

**On Day 1**

* Sales Managers to meet with TAMs for both new and rental for catch up. Topics to cover in this meeting:
  + Rep return to work status – what is allowed, how do we interact with our customers, what are our expectations
  + Marketing programs released to market
  + RPO’s and the process
  + Messaging – what is the consistent message we want our reps to be talking with our customers about – We are here to help, ‘Through thick and thin” ‘Power on the ground’. Mostly about helping customers get back on their feet with cash flow.

## Equipment Sales Administration

Sales Administration, Work in the office, they order equipment from Caterpillar and Suppliers, manage the preparation and installation of outwork, arrange freight and delivery of equipment

### Position at Level 4

No machines are being prepared for sale

No machine sales are being processed

One machine administration staff member is active monitoring administration and quotation requests from the sales channel.

The selected staff member is determined by the critical functions which need to be completed as determined by Caterpillars Sales and Order Process calendar.

The logistics coordinator is checking in briefly each day to monitor and control machine movements in progress.

Any active staff are working remotely.

### Position at Level 3

All staff will be activated immediately to get as much traction as possible on machine deliveries and revenue generation opportunities.

All staff will continue to work remotely.

All Machine Sales Administration critical business functions can be conducted remotely.

* Order range forecasting
* Machine ordering
* Machine quoting
* Merchandising programme claims
* Machine preparation co-ordination
* Delivery communication
* Machine logistics
* Price list management
* Attachment ordering and management
* Post-sale reporting and communication

### Specific actions required - L3

**Before work commences**

* The position of all equipment subject to sale is to be confirmed.
* Any logistics plans to move machines must be set up and put in place ready to be implemented on release from lockdown. (Quotes received; purchase orders placed etc.)
* Equipment Sales Administration are to prioritise the list of new and used machines requiring delivery.
* Sales Coordinators are work with each workshop to determine the order for completion and delivery that will maximise resource efficiency and incoming revenue.
* Sales Coordinators need to check that all required attachments etc have been ordered and get ready to check in delivery timeframes.
* An accurate machine delivery and payment forecast is to be drawn up and shared with the sales team and finance team.

## Accounts Receivable and Accounts Payable

Sales Administration, Work in the office, they order equipment from Caterpillar and Suppliers, manage the preparation and installation of outwork, arrange freight and delivery of equipment

### Position at Level 4

* All business functions expected
* Operates remotely
* Hours scaled to match workload

### Position at Level 3

* Fully operational, performing all business functions
* Operates remotely
* Standard working hours

### Specific actions required - L3

* There are no unique functional activities required to be completed by Accounts Payable and Accounts Receivable prior to or after the release of level 4’s “Essential work only” restrictions.

# Corporate (Grant Whitelaw)

### Position at Level 4

* Fully operational, performing all business functions
* Operates remotely
* Hours scaled to match workload

### Position at Level 3

* Fully operational, performing all business functions
* Operates remotely
* Standard working hours

## Finance and Commercial

Terra Commercial and Financial perform functions to ensure payment to vendors, accounts receivable, cashflow and reporting to the stakeholders of the business.

Finance and Commercial Staff perform these operations out of Christchurch Head.

### Specific actions required - L3

* There are no unique functional activities required to be completed by Finance and Commercial prior to or after the release of level 4’s “Essential work only” restrictions.

## Payroll

Payroll is presently a function of the Transport Group. It is a pivotal function required to keep the business operating and its function must always be maintained either internally or externally.

## People and Culture

### Specific actions required - L3

* There are no unique functional activities required to be completed by People and Culture prior to or after the release of level 4’s “Essential work only” restrictions.

## Health Safety and Sustainability

### Specific actions required - L3

**Before work commences**

* Receive and review branch site plans for compliance with protocols
* Ensure each operational site has sufficient safety supplies (ie hand sanitiser, PPE etc).
* Requisition any required supplies
* Ensure all safety information has been communicated to staff and has been understood

**Day 1 and beyond**

* Report safety status of each operational site
* Manage and report ongoing compliance with the COVID-19 Health Procedure
* Audit operating site compliance information.

## Senior Management

Senior Managers include the Terra executive, Senior Leadership Team and Senior Operational Managers. These staff plan and implement all strategies and required actions to govern the business. They also provide cover for senior operation roles if required.

### Specific actions required - L3

**Before work commences**

* All required prework functions have been assigned to responsible implementors
* Ensure all team stakeholders understand their roles and responsibilities and can carry out the tasks assigned to them.

**Day 1 and beyond.**

* Begin implementation of agreed back to business strategies to ensure as much business as possible is completed as quickly as possible.
* Check back with managers and supervisors to obtain feedback on how operations are progressing.

## Terra Industrial Finance

Terra Industrial Finance manages the existing active lending portfolio written with Bank of Queensland and De Lage Landen through principal and agency agreements with Gough Finance.

### Position at Level 4

* Fully operational, performing all business functions
* Operates remotely
* Hours scaled to match workload

### Position at Level 3

* Fully operational, performing all business functions
* Operates remotely
* Standard working hours

### Specific actions required - L3

* There are no unique functional activities required to be completed by TIF prior to or after the release of level 4’s essential work only restrictions.

# Partner Services (Darren Sandford)

## Customer Support Centre

Terra Customer Support Centre operates to support the customers taking the role in handling customer enquiry.

### Position at Level 4

Two CSC staff are working remotely with two CSC staff on leave.

The CSC is currently working with 1 parts interpreter.

The ISRs are currently all on leave but are both taking leads.

All CSC critical business functions (BCP App 4) are being performed as required

* Management all inbound Customer inquiries (all channels)
* Survey Alert Management,
* NAXT EQ# creation/updates,
* EQ Sales Team CRM activity data entry,
* Oil Lab SOS tier 1 inquiries
* Phone overflow inquiries (when branch counter is unavailable/busy)
* Online/email orders
* Web/email enquiry
* Outbound account management
* New account onboarding
* Parts support for assigned accounts
* Inbound lead management for equipment sales (web/email)
* Outbound prospecting for new leads and lead follow ups
* Hydraulic Work Tools inquiries (all channels)
* Primary contact point for external Customers requiring technical advice or data (all channels),
* Inquiry is directed to them from the Customer Support Agents following initial triage

### Position at Level 3

* Staff will continue to work remotely
* CSA workloads will increase requiring more staff to be reinstated.
* ISRs, Tech Service, and Parts interpreters will become active but remain working remotely.  
  Workloads and output to be managed as per Terra working from home guidelines.

### Specific actions required - L3

* There are no unique functional activities required to be completed by the CSC prior to or after the release of level 4’s essential work only restrictions.

## Asset Management and Connectivity

This operating unit is responsible for connecting assets and subscribing connectivity devices

They provide support for customers and troubleshoot issues relating to connectivity platforms.

### Position at Level 4

Connectivity Manager and Connected Assets Administrator are both active and are working remotely.

All Critical tasks are being performed as required.

* Quoting ProductLink Installation and EM Services
* Digital Excellence Program
* Tasks relating to connecting assets
* Tasks relating to subscribing devices
* Tasks relating to registering users (Connectivity)
* Maintaining remote contact with customers around issues
* Troubleshooting for customers relating to connectivity platforms (Support)
* Providing reporting as required

### Position at Level 3

No activity change is expected between Level 4 and Level 3.

### Specific actions required - L3

* There are no unique functional activities required to be completed by TIF prior to or after the release of level 4’s essential work only restrictions.

## Condition Monitoring Advisors

There are 4 Advisors and one supervisor.

### Position at Level 4

Active staff have been scaled to support only essential business reporting requirements.

All active staff are working remotely.

### Position at Level 3

Active staff will be scaled up to meet all customers reporting requirements.

All active staff will continue to work remotely.

### Specific actions required - L3

**Day 1 and beyond**

* Prepare a priority list of equipment which is overdue for attention
* Liaise with the CVA team to set a priority list for maintenance scheduling

## Marketing

Terra Marketing creates funnel sales management and promotes products and support service currently on offer.

### Position at Level 4

All staff are active

All active staff are working remotely.

Staff are expected to be working on lead generation.

### Position at Level 3

All staff will continue to work remotely fulfilling all business functions.

Staff focus will change from lead generation to:

* “return to work” scenarios and promotions
* Standard operating functions

### Specific actions required - L3

**Before work commences**

* Create marketing strategies which will allow the business to “hit the ground running”
* Prepare communications (internal and external) around any proposed marketing programs and advise all stake holding operational units.

**Day 1 and beyond**

* Roll out the agreed marketing strategy
* Prepare reporting and success measurement tools.

## Partner Services

### Position at Level 4

One CVA and Standard Job Coordinator active and working remotely

All Critical tasks are being performed as required.

* PM Standard Jobs;
* CVAs
  + Quoting;
  + Invoicing;
  + Scheduling; and
  + Management
* Provide analytical support to the Asset Management Team

Cody continues to manage the digital transformation program and projects.

### Position at Level 3

* All staff will continue to work remotely
* Staff will re-activate scaled according to customer activity.

### Specific actions required - L3

**Before work commences**

* Prepare a list of all outstanding CVA work which has not been undertaken during the shutdown. May need to liaise with CMAs
* Prioritise work and arrange a work program which can be undertaken within the operating confines of Level 3
* Run full schedule today so that Service Advisors have current schedule available when they return to work tomorrow.
* Working on implementing DocuSign with CVA’s so that we are better equipped to operate under strict conditions – approved.
* Email to CVA customers due for a service with any “back to work” promotions.
* Schedule with all Follow Up Notes (additional work required as identified by CMA’s) sent to Regional Managers so that PSSR/SA can call customers to discuss service and repairs.
* Looking at PM alerts system and process for connected machines not on a CVA (contacting customers with connected machines when they are due for a service).
* Concentrated focus on creation of standard jobs which is a key enabler for many workstreams, processes and systems for both Service and Asset Management.
* Complete outstanding CVA invoicing.

**Day 1**

* Lock in desired work programs with customers and begin implantation program

## Productivity Services

### Position at Level 4

Both members of this team are inactive.

No Critical Functions are required to be performed at this alert level.

### Position at Level 3

Both staff will become active to perform critical functions as allowed under social distancing protocols.

Critical responsibilities of this operational unit are:

* Look after the 2D 3D Machine control and guidance.
* Train Technicians
* Tran Salesforce
* Available for Customer visits
* Manage Sitech Relationship
* Commercialise productivity

### Specific actions required - L3

**Day 1**

* Prepare an action plan for how these roles will operate in a remote environment.

## Terra Analytical - Administration

### Position at Level 4

* Admin team is working remotely.
* Critical admin tasks are being performed for “essential business” samples only.
  + Sample sorting
  + Sample Registration
  + Branded Sample Registration
  + Group Sample tickets ready for on-site filing.
  + Compilation & shipping of Z orders.

### Position at Level 3

* Same as level 4

### Specific actions required - L3

* There are no unique functional activities required to be completed by the Lab Admin Team prior to or after the release of level 4’s essential work only restrictions.

## Terra Analytical - Laboratory

### Position at Level 4

* Testing to support "critical businesses" only
* On site staff presence minimised
* Oil lab periodically closed depending on sample volumes
* Pass warehouse activities over to Warehouse Team

### Position at Level 3

* The Laboratory should be fully operational performing all operational functions which complying with all global operational staff protocols
* The only difference from BAU is activities in the Warehouse will be passed over to the Warehouse team, and with the use of pick up and drop off points.

### Specific actions required - L3

* There are no unique functional activities required to be completed by the “Wet” Lab Team prior to or after the release of level 4’s essential work only restrictions. They could continue operating as they have been for “Essential Business”

## Terra Analytical - Interpretation

### Position at Level 4

Both members of this team are inactive.

No Critical Functions are required to be performed at this alert level.

### Position at Level 3

* Fully operational, performing all business functions
* Operates remotely
* Standard working hours

### Specific actions required - L3

* There are no unique functional activities required to be completed by the Lab Interpretation Team prior to or after the release of level 4’s essential work only restrictions.

# Parts Operations (John Gillman)

## Parts Operations

Terra Parts operates in multiple sites supporting CAT equipment.

Parts Branch operate in an internal customer and over the counter capacity.

This is supported by 2 main distribution Warehouse in Christchurch and in Auckland.

Head office parts support operates out of the Christchurch location.

Some roles that would cross shifts work from home for a few hours then come in.

Critical tasks performed by Parts Operations are:

* Receive parts orders
* Document all Part Sales
* Extracting and storing PM Kit or Hose Assembly
* Sourcing Parts from External Sources
* Sourcing Parts from internal branches
* Sourcing Parts from Caterpillar
* Process Parts Sales (invoice)
* Processing Credits
* Documentation for Parts Supplied by another branch

### Position at Level 4

One Parts Interpreter is working remotely with the CSC.

The ISRs are currently all on leave but are both taking leads.

Parts orders are being taken and processed.

All parts functions are being undertaken on a scale to match the volume of work received.

### Position at Level 3

Parts orders are expected to increase as essential and non-essential business comes back online.

All functions will continue to be undertaken but in greater volumes.

ISRs will become active and work remotely performing their roles.

### Specific actions required - L3

#### Parts Support, ISR and Product Managers

* There are no unique functional activities required to be completed by the Parts Support, ISR or Product Managers, prior to or after the release of level 4’s essential work only restrictions.

#### Parts Counter - Before work commences

* Receive internal parts requisitions from internal operating units preparing to restart work.
  + Order parts as required
  + Prepare internal transport requisitions to ship necessary non-essential parts when lockdown ends.

**On Day 1**

* Prepare workspace and communications equipment for “Click and Collect”

## Warehouses/Distribution (John Gilman)

### Position at Level 4

Reduced staff are working on site, as required to meet work requirements for essential business

All on-site staff are working in shifts and maintaining physical distancing protocols.

Only parts for essential business are being shipped

Parts for non-essential business are being prepared ready to be shipped as soon as Alert Level 4 is lifted.

### Position at Level 3

Staff will be scaled up in order meet workload requirements

Parts may be shipped to support all forms of business

All active staff will maintain working in shifts

Critical tasks performed by the Warehouse / Distribution are:

* Process parts orders
* Identify Part Locations
* Pick Parts Orders
* Parts Return
* Dispatch Parts Orders
* Stock Shipments inward and outward

### Specific actions required - L3

**Before work commences**

* Examine unfulfilled parts orders and resource requirements
* Perform “Right to Start” – record attendance for “Contact Tracking”
* Manager to perform a quick visual safety check and security sweep of the site
* Inspect all current Jacked, Blocked or Suspended work is safe
* Set up customer and staff “Parts Collection Points”
* Put up the “Restricted Area” signage at customer entry points (with 0800 9339393 contacts for customer assistance) and the Ministry of Health green poster, ensure the entry is restricted
* Place “Our COVID Code” on notice boards
* Pin back doors and remove doors where and if appropriate
* Complete pre-starts for each forklift
* Complete pre-start for gantry and jib cranes
* Complete pre-start of WAH gear
* Complete WSR for workplace, put actions in place to attend to any issues
* Complete inspections for any fixed or mobile plant which is not covered in the WSR
* Please advise Terra Safety Team of any inspections via email so the WSR can be updated
* Complete pre-start for all vehicles
* Complete pre-starts for all trailers
* Branch Manager or Supervisor to consult with “Health & Safety Rep” and then complete “Terra Day 1 – COVID-19” vault check
* Advise your allotted senior manager that the day 1 activities have been completed

**On Day 1**

* Perform “Right to Start” – record attendance for “Contact Tracking”
* Cover first “4 week goals” with all staff – “Return to Work Comm’s”
* Cover “Contact Tracking Requirements” – “Our Continued Response to COVID L3”
* Review “Our COVID Code (L3)”
* Cover customers and visitors are not to enter the premises
* Allocate safety inspections and actions to staff to be completed prior to any work commencing
* All staff to complete “Pause and Think” prior to completing task
* Update all Hazard boards
* Review all LOTO process’s in the work place and for Field Service
* Allocate “Common Area” and “Common Surfaces” cleaning to staff to be completed prior to the end of the shift
  + Nominate a “Disinfection Crew” for a COVID emergency
  + Obtain or order cleaning equipment, Appendix C - PPE / Cleaning equipment for COVID emergency, “Our Continued Response to COVID L3”
* Perform cleaning drill with the “Disinfection Crew
* Advise your allotted senior manager that the day 1 activities have been completed
* Obtain or order cleaning equipment, Appendix C - PPE / Cleaning equipment for COVID emergency, “Our Continued Response to COVID L3”
* Perform cleaning drill with the “Disinfection Crew”

# Service (Stuart Thornley)

## Service Operations

Terra Service operates in multiple sites supporting to CAT equipment.

Technicians operate in a field service environment and Main shop environment supporting equipment.  Service Administration, Work in their respective branch locations supported by Head office support team. The Head office support team consists of Service development, Accounts, Technical communicators.

## Tech Services

Primary contact point for external Customers requiring technical advice or data (all channels), enquiry is directed to them from the Customer Support Agents following initial triage

### Specific actions required - L3

* There are no unique functional activities required to be completed by Tech Services prior to or after the release of level 4’s “Essential work only” restrictions.

## Warranty

### Specific actions required - L3

* There are no unique functional activities required to be completed by the Warranty Team prior to or after the release of level 4’s “Essential work only” restrictions.

## Workshops

### Position at Level 4

Reduced staff are working on site as required to meet work requirements for essential business

All on-site staff are working in shifts and maintaining physical distancing protocols.

Only repairs for essential business are being shipped

### Position at Level 3

There are no restrictions on what work types can be undertaken

Work authorisations are no longer required to be completed

Staff will be scaled up in order meet workload requirements

Heavy Diesel technicians will return to work.

Work being undertaken by field service techs will be passed back to Heavy Diesel technicians

Parts may be shipped to support all forms of business

All active staff will maintain working in shifts

### Specific actions required - L3

**Before work commences**

* Examine work pipeline and resource requirements
  + Consider all WIP
  + Reach out to customers with WIP and reconfirm their expectations.
* Any parts pre-order, pre/re supply work required so tasks can be assigned and started on Day 1
* Prepare any necessary work handover
* Perform “Right to Start” – record attendance for “Contact Tracking”
* Manager to perform a quick visual safety check and security sweep of the site
* Inspect all current Jacked, Blocked or Suspended work is safe
* Set up customer and staff “Parts Collection Points”
* Put up the “Restricted Area” signage at customer entry points (with 0800 9339393 contacts for customer assistance) and the Ministry of Health green poster, ensure the entry is restricted
* Place “Our COVID Code” on notice boards
* Pin back doors and remove doors where and if appropriate
* Complete pre-starts for each forklift
* Complete pre-start for gantry and jib cranes
* Complete pre-start of WAH gear
* Complete WSR for workplace, put actions in place to attend to any issues
* Complete inspections for any fixed or mobile plant which is not covered in the WSR
* Please advise Terra Safety Team of any inspections via email so the WSR can be updated
* Complete pre-start for all vehicles
* Complete pre-starts for all trailers
* Branch Manager or Supervisor to consult with “Health & Safety Rep” and then complete “Terra Day 1 – COVID-19” vault check
* Advise your allotted senior manager that the day 1 activities have been completed

**Day 1**

* Perform “Right to Start” – record attendance for “Contact Tracking”
* Cover first “4 week goals” with all staff – “Return to Work Comm’s”
* Cover “Contact Tracking Requirements” – “Our Continued Response to COVID L3”
* Review “Our COVID Code (L3)”
* Cover customers and visitors are not to enter the premises
* Allocate safety inspections and actions to staff to be completed prior to any work commencing
* All staff to complete “Pause and Think” prior to completing task
* Update all Hazard boards
* Review all LOTO process’s in the work place and for Field Service
* Allocate “Common Area” and “Common Surfaces” cleaning to staff to be completed prior to the end of the shift
  + Nominate a “Disinfection Crew” for a COVID emergency
  + Obtain or order cleaning equipment, Appendix C - PPE / Cleaning equipment for COVID emergency, “Our Continued Response to COVID L3”
* Perform cleaning drill with the “Disinfection Crew
* Advise your allotted senior manager that the day 1 activities have been completed
* Obtain or order cleaning equipment, Appendix C - PPE / Cleaning equipment for COVID emergency, “Our Continued Response to COVID L3”
* Perform cleaning drill with the “Disinfection Crew”

## Field Service Technicians

### Position at Level 4

Field Service Technician resource is currently scaled according to work requirements.

Work may only be conducted for customers classified as Essential Businesses

Work may be conducted at the customers site or machinery can be taken to the Terra workshop as necessary.

Active Field Service Technicians are on call.

Active field service technicians are working on a 5 and 5 roster.

(5 days of 11 hours on – incorporating 2x30 minute breaks; and then 5 days off.)

### Position at Level 3

Workload is expected to increase as non-essential businesses come online

Rostered work is expected to continue

Field Service Technicians to AM or PM shift for branch access only

Shift hours are standard work hours

Roster is 5 days per week

Field Technician may only be at the branch for Parts collection and drop-off according to their assigned shift

All types of work may be conducted in the field.

Each field technician must only use a single allocated vehicle.

Parts and Service requests to be made digitally

May not enter Terra facilities

No close contact with Branch personnel (even outside)

Parts and tooling will be delivered under request from field team - To use parts/tooling collection/drop-off areas

Field Service techs working on the same job must maintain physical separation and must travel to site independently.

### Specific actions required - L3

**Before work commences**

* Physical distancing protocols require that Field Service techs are not to engage with the workshops or to share any other operating unit’s space.
* If entering Terra property, they must maintain the same protocols as customers, or ideally full isolation.
* They should work from their own vehicles and use designated parts pick up and drop off points.

## Component Rebuild Centre (CRC)

### Position at Level 4

Work is only being conducted on verified projects for essential services

Staff are working in shifts maintaining physical distancing protocols

Staff levels are scaled to match workload requirements

### Position at Level 3

Work can be conducted for all types of business.

All available active staff will continue to work in shifts maintaining physical distancing protocols.

### Specific actions required - L3

**Before work commences**

* Examine work pipeline and resource requirements
  + Operation Unit Manager to consider all WIP for the CRC
  + Reach out to customers with WIP and reconfirm their expectations.
* Examine any parts pre-order, pre/re supply work required so tasks can be assigned and requests made on Day 1
* Perform “Right to Start” – record attendance for “Contact Tracking”
* Manager to perform a quick visual safety check and security sweep of the site
* Inspect all current Jacked, Blocked or Suspended work is safe
* Set up customer and staff “Parts Collection Points”
* Put up the “Restricted Area” signage at customer entry points (with 0800 9339393 contacts for customer assistance) and the Ministry of Health green poster, ensure the entry is restricted
* Place “Our COVID Code” on notice boards
* Pin back doors and remove doors where and if appropriate
* Complete pre-starts for each forklift
* Complete pre-start for gantry and jib cranes
* Complete pre-start of WAH gear
* Complete WSR for workplace, put actions in place to attend to any issues
* Complete inspections for any fixed or mobile plant which is not covered in the WSR
* Please advise Terra Safety Team of any inspections via email so the WSR can be updated
* Complete pre-start for all vehicles
* Complete pre-starts for all trailers
* Branch Manager or Supervisor to consult with “Health & Safety Rep” and then complete “Terra Day 1 – COVID-19” vault check
* Advise your allotted senior manager that the day 1 activities have been completed

**On Day 1**

* CSC has been operating through Level 4 so this is not a cold start, however the following items should be checked for safety and completeness.
* Perform “Right to Start” – record attendance for “Contact Tracking”
* Cover first “4 week goals” with all staff – “Return to Work Comm’s”
* Cover “Contact Tracking Requirements” – “Our Continued Response to COVID L3”
* Review “Our COVID Code (L3)”
* Cover customers and visitors are not to enter the premises
* Allocate safety inspections and actions to staff to be completed prior to any work commencing
* All staff to complete “Pause and Think” prior to completing task
* Update all Hazard boards
* Review all LOTO process’s in the work place and for Field Service
* Allocate “Common Area” and “Common Surfaces” cleaning to staff to be completed prior to the end of the shift
  + Nominate a “Disinfection Crew” for a COVID emergency
  + Obtain or order cleaning equipment, Appendix C - PPE / Cleaning equipment for COVID emergency, “Our Continued Response to COVID L3”
* Perform cleaning drill with the “Disinfection Crew
* Advise your allotted senior manager that the day 1 activities have been completed

# Power Systems (Greg McCarthy)

Terra Power Systems operate several different functions to sell and supply equipment

Territory Sales Staff

Operate out of their vehicles visiting customers generating opportunity, selling and delivery of equipment.

Power Systems Territory Sales Staff operate with the same guidelines as other [Territory Sales Staff](#_Equipment_Sales)

Sales Administration

Work in the office, they order equipment from cat and Suppliers, manage the preparation and installation of outwork, arrange freight and delivery of equipment.

Power Systems Sales Administrators operate with the same functions and guidelines as [Equipment Sales Administration](#_Equipment_Sales_Administration).

Projects and Engineering

Projects and Engineering staff complete Tender reviews providing pricing for equipment and outwork, liaising with suppliers, provide complex Electrical and control designs, provide drawings and supporting documentation Implement new installations, managing outworkers on site, Commission new equipment.

Field Engineering staff operate with the same functions and guidelines as [Field Service Technicians](#_Field_Service_Technicians).