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Queensman Spades UAE
Office Suite 815, Al Manara Tower, Marasi Drive,
Business Bay, Dubai, United Arab Emirates,
T: +971 (0)4 570 6129, E: services@queensman.com
+971 56 580 0293

Queensman Spades UK
Clarendon House, 2nd Floor,
52 Cornmarket Street, Oxford, OX1 3HJ, UK
T: +44 1865 304056, E: services@queensman.com
+44 7402 308 203

www.queensman.com

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2nd Generation APP Project Scope Definition.

Company Focal Point: Faizan Fakhri / Alison Bate.

Consultant Focal Point: Murtaza Hanif

Project Initiation: March 24th 2021.

Project Completion: May 31st 2021.

Project Scope:

Brief:

Building on the existing APP / Web Portals – we would like to incorporate further workflows with a particular focus on the three aspects below with integration with ZOHO ONE and the website in preparation for the next project (to offer service request, schedule and payment through the website):

1. Client Centric APP + Web portal development – workflows, simplicity and features.
2. Operations Teams APP interface
3. Admin Portal on APP / Web portal – metrics, statistics, analysis, reports.

Specifications ('wants') –

Workflow anticipated (as drawn out)… Note should populate data to App and ZOHO CRM.

CLIENT APP (WEB PORTAL):

1. Client Subscribes:
    a. Upload Contract copy (usage of ZOHO Sign)
    b. Invoice (via ZOHO Books)
    c. Receipt (via ZOHO Books)
    d. Automate welcome email and inform the contract has uploaded into their login
    e. Add schedule for Inventory booking (condition within 5 days of contract start) – keep manual with Ops Coordinator involvement.
    f. Confirm App installation
    g. Confirm Consultant to meet and greet in person (or video call using ZOHO Meet) and demo app usage on the day of inventory.

2. Inventory Created on date
    a. Team completes Inventory
    b. Ops Coordinator Reviews Inventory Report
    c. Ops Manager approves Inventory Report
    d. Upload to client app
    e. Send automated email that Inventory Report Uploaded
    f. CONDITION: Report must be uploaded within 7 days.
        i. Once uploaded – metrics report to Ops Manager, Director, Consultant, Sales Manager, Financial Controller that is met or not.
        ii. If NOT – action with Sales Manager
        iii. If Yes – move on.

3. Operations Coordinator Create Annual Schedule
    a. Create and Upload plan (annual menu) for year to mimic Customer Journey.
    b. Operations Manager Review to check all included
    c. Email client with cc Sales
    d. Write into CRM
    e. Set follow up tasks within CRM for consultant to check in with client at Q1, Q2, Q3, Q4 midpoints.
    f. Consultant to add Follow up notes and email automate to Ops, Sales Managers.
        i. If Not within 3 days of task – escalate as pending

4. CLIENT CALLOUT REQUEST
    a. Open App – Post a ticket (existing process – categories, notes and photos upload .. ADD video upload with restricted time duration 30secs but offer multiple videos). NOTE – Need to restrict with effect of contractual terms what is a urgent after hours definition… restrict by sub-category of callout nature.
        i. Urgent – after ticket entered system sms or notify emergency team
            1. If no response within 10mins, escalate to Operations Coordinator

2. If no response within further 5 mins, escalate to Operations Manager and Operations Director
3. If no response within 20mins notify client that response has been delayed – please call Emergency Team Callout Number

ii. Normal priority –
1. Offer a date/time scheduler to self-select. Should integrate with the multiple teams schedule calendars and show as a single calendar if someone available or not … ensure for job categories in background will filter the appropriate team calendar is made available.
2. Within the team calendars and logic to specify which teams can do which categories of work
3. TO ADD to job categories – particularly spit plumbing and AC type jobs
    a. Plumbing to split into
        i. Water Leakage
        ii. Pumps problem (pressure low)
        iii. Drains blockage- WCs
        iv. Drains Blockage – Sinks, floor traps
    b. ACs to split into ..
        i. Services Request
        ii. AC not cooling
        iii. Thermostat not functioning

5. SCHEDULED TASKS:
    a. 2 weeks prior to session send notification to confirm appointment and date
        i. Add MUST DO to confirm date/time
        ii. If Yes – confirm notification within app
        iii. If Not – Option to change
            1. Send back to scheduler with pre-feed of job category etc .. to just change day and time in available calendar.
            2. Notification of confirmed new slot details
        iv. Notification confirmation of slot to say Which Team and Who will be attending the job.
        v. Send notification that to inform us if any scare or contact with Covid positive case and give email. State our teams will be masked and actively we are coordinating our teams to be vaccinated.

6. TICKET CLOSED
    a. Client to receive survey to give feedback.
    b. Survey to be cc'd to Ops, Sales Managers, Consultant and Coordinator.
    c. Upload job report to login and Notification send to client that job report of ID reference uploaded
    d. Write report summary and feedback to CRM
    e. If score less than 4 of 5 task a follow up with Ops Manager to call client
    f. CRM Task to cc Managers and Consultant with feedback from call

g. Raise SQ flag in App admin panel
h. Send a notification to client that a SQ issue was raised on job – add notes from Ops Manager call.
i. Within one week Senior Management (Alison or Faizan) to give follow up call.

7. FOLLOW UP TASK to job Ticket
    a. If Job requires a follow up – Job to stay open as 'deferred' and be created on site by Operations Team Leader. SEE Ops Team Portal – client availability date/time to be set on site with client.
    b. Client feedback to be still taken.

8. REQUEST FOR ADDITIONAL SERVICES
    a. Have an additional front screen button
    b. Allow to link with Consultant schedule to request a callback date/time slot
    c. Write into CRM and assign task
    d. Keep cc Alison – Manager of Sales Team and Ops Manger
    e. Send client notification reminder of callback slot
    f. Offer option to change slot if requited in notification
    g. Create follow up task for Coordinator if request not actioned within 2 hours of scheduled callback appointment

9. MONTHLY SUMMARY Reports
    a. Exists – to QA/QC and revise if required.
    b. Add a listing of summary of statistics of number of preventative care appointments and callouts attended to contract year to date.
    c. Send notification that at month end report has been auto-created of services summary for month.

OPERATIONS APP (NO web portal):

1. EMERGENCY TEAM (only)
    a. App Request or sms/email/notification
    b. Respond with call (Can this be written into CRM or app db??)
    c. Respond at site
    d. Create ticket at site or after call if not created by client
    e. Attend to problem
    f. If temporary fix, create ticket for follow up and stop ticket as deferred.
    g. Take client feedback to job

Normal preventative (scheduled) service slots or normal priority callouts –

2. Schedule Day Plan of jobs via APP only – NO MORE WhatsApp groups

    a. 'On the way' sms/notification/whatsapp message to Client (inc Job 1 of day) pre-1 hour of schedule.
    b. If pre-job not closed by 45mins of next job start auto sms/notification to next client + cc to Ops Coordinator + Ops Manager… " Sorry the team is running late on the previous job. The coordinator will be in contact shortly"
    c. If closed pre-job early .. sms/notification ' Our team is a little ahead of time, expect them within an hour.'
    d. If closed pre-job on time (=/- 10 mins) sms/notification ' Hi. We're running to plan – our team will be with you as scheduled'

3. Start JOB in App (date/time stamp record) + GPS usage on mobile phone (??)

4. Verify Ops Coordinator Comments if in scope of contract

5. Take pre-job photos (date/time stamp)

6. Diagnosis notes (must be written notes) (date/time stamp)

    a. If can perform job, go to 7.
    b. If deferred – go to 10.
    c. If OUT OF SCOPE _ REQUEST QUOTATION – go to 15.

7. Do Job

8. Post-job photos (date/time stamp)

9. Client Feedback (date/time stamp)

10. Close Ticket – Deferred or Completed

a. If Deferred – create follow up date/time at site (with call to coordinator/Ops Manager and confirm with client availability)
b. Flag Deferred ticket on SQ records + label as High Priority

11. ADD new ticket – Team Ops Leader to either create or choose no further ticket.
    a. If Yes – is it a small task to do straight away.
        i. If not a small task to do at the time to coordinate with client to select through calendar preferred slot date/time as usual ticket selection.

12. Send Job summary report to CRM – highlight SQ issues, ranking, feedback comments, follow up tasks / upsell tasks request. (date/time stamp)

13. In ZOHO … Create Scorecard template for each Job Ticket – load into Ops dashboard … select by client, community (location), team, month, full organisation levels.

14. In ZOHO … Create Job tickets Analysis Dashboard … by category, date, community, team, month etc.

15. REQUEST FOR QUOTATION –
    a. In App Add task with details – write to CRM and assign task to person (Options – send action to all Managers .. Alison, Aman, Faizan, Victor to action or assign further).
    b. Flag if Urgent with ZOHO notification to management team.
    c. Add Quotation process metrics into dashboard.
    d. Follow workflow in ZOHO to client acceptance as quote to invoice to receivables to expenses of materials to revenue/net metrics less direct costs (direct definition to be explained)

16. MATERIAL ORDER REQUIRED for deferred task
    a. Explain to client – document within app – write to CRM
    b. Flag in app that going off-client-site to purchase materials – load pics of parts required
    c. Flag as priority level if deferred or moving off-site.
    d. Record any discussion with Coordinator / Ops Manager on resolve.
    e. If deferred for materials – assign who and when will need to source materials. (Ops Manager ?)

ADMIN APP (WEB PORTAL):

1. Calendar – merged for teams schedules
2. Open tickets
3. Deferred Tickets
4. Materials Requests Coordination with Ops Manager
5. Inventory Reports QA/QC process – prep
6. Callout Requests – QA if in scope + warranty cover level. Add comment to callout for team to see.
7. Monitor Team timings (automated). Make a call to the client if required
8. Quotation Requests follow up
9. New Clients registration process
10. Client App access – reset passwords, add, pause client access etc.

Above should be linked with Zoho or maybe replaced by Zoho Analytics and built within ZOHO One.

Workflows to be followed through Zoho to invoice, inventory, expense, CRM, etc.

Then next step is to have gaps in schedules to be filled with adhoc (individual) tasks from web requests (later in year) and via Service Market requests.

Service Market leads to Sales Team needs to then be coordinated with Ops Coordinator to sell the empty slot approach.
