

• DIAGNOSE · THE WHOLE OPERATION

Where Fernmoor FM **is bleeding.**

Every system read, every open job counted, months of the desk's phone log worked through. Every count measured from the operation's own systems; hours measured where the systems hold them, otherwise stated as assumptions; every pound priced with the assumption on the page. Then the fixes, shown running.

PREPARED FOR

Fernmoor FM (illustrative)

PREPARED BY

Proofworks

STAGE

00 · Diagnose

REFERENCE

PW-DIAG-SAMPLE · v5.0

Fernmoor FM is not a real company. It is based on real FM operations we have worked inside, with every figure adjusted to protect the clients: scaled to one business size, rounded and reshaped, while keeping the patterns we actually found.

• WHAT A DIAGNOSE IS

Three weeks. The whole operation. A priced plan at the end.

Price	From £7,500, fixed before we start. More than two client CAFMs, a CAFM we don't yet support, or more than one desk raises the fixed price, agreed before we start.
Duration	About three weeks from the day access is in place.
What we read	Your job system and your clients' CAFMs, read-only; three months of your phone log; a month of the desk rota; a sample of call recordings; walkthroughs with the people who do the work.
What you provide	Read-only logins, the phone log and rota exports, your site list, a few finance figures (role costs, night rates, average invoice value, three months of credit notes), and six to eight hours of your people's time across the three weeks.
What you get	A ranked loss map with the evidence behind every number, the assumptions and what we refused to price, a roadmap with fixed prices for the first Proofs, a register of the tools your teams already use, the day's list shown running on your own jobs, and, where you run a desk on a CAFM we support, the call demonstration.

• 01 · THE SHORT VERSION

The work gets done. The operation around it leaks.

Engineers attend, jobs close, clients get served. The money goes in the gaps between systems and people: work keyed twice, calls chasing jobs that should already be moving, finished work nobody has billed, and nights that hang on one person.

FERNMOOR FM, THE BUSINESS IN THIS SAMPLE

An FM contractor running **2,500 reactive jobs a month**, **1,800 of them arriving through clients' own CAFMs**, with **about 1,000 jobs open** at any one time and a **helpdesk of 12 full-time equivalents** covering days and nights. Every figure in this report is sized to that business.

£324k–£457k

a year leaking: measured counts and hours, priced with stated assumptions

£84k–£168k

of cash held up in stalled and unbilled jobs

34,000

chase calls a year, counting only the calls with an outcome recorded

4.7–7.2 FTE

of desk capacity freed: the next contract without the next hire

WHAT WE WOULD DO FIRST

Two Proofs, side by side, neither of which touches a live record.

A daily operating list built from the job system as it stands: the return visits, the jobs waiting to be billed and the jobs dying on hold, each in front of the person who moves it. Read-only, so it runs on live data from day one, and it goes after up to **£168k of held-up cash** first.

The re-keying connector, proved against a copy of a client's CAFM seeded with Fernmoor's own jobs. At £135k a year of re-keying, the Proof and the build together cost less than a month of it.

• 02 • THE LOSS MAP

Every stage of the job, ranked by what it costs.

Every count is measured from the operation's own systems; hours are measured where the systems hold them, otherwise stated as assumptions. Each finding is marked **Measured** (read from the systems), **Observed** (seen in walkthroughs) or **Reported** (a figure the operation gave us). The step to pounds uses the assumptions named in **Priced with** and set out in section 04. **Cash** rows are money held up once, not lost every year.

REF	STAGE	WHAT WE FOUND	PRICED WITH	A YEAR	THE FIX
Fix 1	Intake & completion	1,800 jobs a month arriving through clients' CAFMs, each keyed in and its completion keyed back MEASURED	A11 · A1	£135k	Connector, both ways
Fix 2	Intake & chase	9,900 hours a year on the desk phones; 8,500 of them new-job, chase and contractor calls MEASURED	A10 · A2 · A1	£95k–£175k	Software desk operator (not a hire)
Fix 3	Out of hours	Every night, 10pm to 6am, covered by one person for 15–20 calls MEASURED	A1 · A3	£55k–£69k	Software desk operator out of hours
Fix 4	Completion	Job cards sent to customers unread and client photos not carried across, on 30,000 jobs a year OBSERVED	A5	£26k–£53k	Job card clean-up + carry attachments
Fix 5	Mobilisation	Around eight weeks of manual set-up for each new client contract REPORTED	A7 · A1	£6k–£11k	Mobilisation tool

REF	STAGE	WHAT WE FOUND	PRICED WITH	A YEAR	THE FIX
Fix 6	Reporting	Jobs raised without reporting tags; every month-end report rebuilt by hand OBSERVED	A6 · A1	£3k–£8k	Validate at the point of raising
Fix 7	Quoting	Site surveys typed on tablets, then retyped into quotes OBSERVED	A8 · A1	£3k–£6k	Survey-to-quote capture
Fix 8	Billing	About 190 jobs completed and waiting to be priced up MEASURED	A4 CASH	£48k–£95k	Price-up queue
Fix 9	Chase	About 1,000 jobs open, three in four past due; about 145 stuck on a return visit or on hold MEASURED	A4 CASH	£36k–£73k	Daily operating list
Fix 10	Commercial	An open quote book worth several million pounds, never reconciled MEASURED	NOT PRICED	n/a	Reconcile before relying on it
Fix 11	Tools & knowledge	Departments building their own tools on private accounts; nobody can see what exists OBSERVED	NOT PRICED	n/a	Tools register + company workspace

WHAT IT ADDS UP TO

£324,000–£457,000 a year leaking across Fix 1 to Fix 7: measured counts and hours, priced with the assumptions in section 04. On top of that, **£84,000–£168,000 of cash** is sitting in finished or stalled jobs (Fix 8 and Fix 9), waiting for someone to move them.

What we saw, what it costs, who owns it, what fixes it.

Fix 1 Every client job crosses two systems by hand, twice.

MEASURED

£ VIA A11 · A1

WHAT WE SAW

Of 2,500 jobs a month, **1,800 arrive in a client's CAFM** and are typed into Fernmoor's own system. The engineer completes the job once; an administrator types the completion, times and certificates back into the client's. Two manual crossings on every one.

WHO OWNS IT

Operations director; the administrators doing the crossing.

WHAT IT COSTS

At ten minutes a crossing (A11), that is **7,200 hours a year**, or **£135,000** at £32,000 fully loaded (A1).

THE FIX, AND ITS COST

A connector that matches on the client's own job reference, writes each side and **reads the record back to prove it landed**. Prove £2,500; build £6,000 for the first two directions. **£8,500 is less than a month of the loss**, and about three months even if the fix removes only a quarter of it.

Fix 2 The desk isn't a call centre. It's a chasing operation that answers the phone.

MEASURED

£ VIA A10 · A2 · A1

WHAT WE SAW

Every call in the phone log, annualised: **about 95,500 calls in**, averaging just over four minutes of talk, and **58,500 dialled out: 9,900 hours a year on the phone, 5.8 FTE, nearly half the 12 FTE desk**. Of the calls with an outcome recorded, nearly a third of inbound calls were someone chasing a job already raised, and nearly half of outbound calls were the desk chasing: **34,000 chase calls a year among the calls with an outcome recorded**. About a third of phone time had no outcome recorded at all, so the true figure is higher. On the biggest client alone, about 400 jobs are open, more than 80% past their fix target.

WHO OWNS IT

Helpdesk manager; account champions.

WHAT IT COSTS

The calls a software operator is built for (logging new jobs, sites chasing in, chasing out, contractor calls) come to **about 8,500 hours a year: 5.0 FTE**. Taking 60–80% of them (A10), plus the off-phone work around each chase (A2), frees **3.0–5.5 FTE of the day desk: £95,000–£175,000 a year** at £32,000 fully loaded (A1). With nights (Fix 3), **4.7–7.2 FTE, two-fifths to three-fifths of the desk**.

THE FIX, AND ITS COST

A **software desk operator, not a new hire**. It answers the call, raises the job in the CAFM against the client's own questions and priorities, gives the site a real status when they ring, and chases the contractor who has gone quiet. **Proven on real calls to a working desk line, in a test queue**. The freed time is **capacity, not redundancies: the next contract without the next hire**. Build £14,000; running costs indicative (A9). With nights, net of running costs, that is **about £105,000–£220,000 a year back**: the build pays for itself **within about two months**.

Fix 3 Nights hang on one person.

MEASURED

£ VIA A1 · A3

WHAT WE SAW

From the phone log, between 10pm and 6am: **every night is covered by a single person**, handling **15–20 calls**, about half coming in, half dialled out, so the chasing carries on overnight too. Around a sixth of all desk hours are worked by agency staff.

WHO OWNS IT

Helpdesk manager; HR.

WHAT IT COSTS

Continuity first: one sick call and the out-of-hours line has nobody on it. In pounds, one person for eight hours every night is **2,920 hours a year: £54,900** at £32,000 fully loaded (A1), or **£68,600** with a night premium (A3).

THE FIX, AND ITS COST

The software desk operator in Fix 2 answers out of hours, so night cover stops hanging on one person, with a duty manager called only when something carries commercial or safety consequence. Included in the Fix 2 build.

Fix 5 Every new contract costs two months before the first job.

REPORTED

£ VIA A7 · A1

WHAT WE SAW

Sites, assets, permissions and admin for each new client contract are **set up by hand over around eight weeks** (the operation's own figure), and that is where most set-up errors start.

WHO OWNS IT

Mobilisation lead; IT.

WHAT IT COSTS

One person half- to full-time across the eight weeks, two new contracts a year (A7): **£5,600–£11,100 a year**, before the cost of every contract starting two months late.

THE FIX, AND ITS COST

Map the incoming client's set-up, then load it with a tool rather than by hand, checked record by record. Priced once the incoming set-up has been mapped.

Fix 8 Finished work, not billed.

MEASURED

CASH · A4

WHAT WE SAW

About 190 jobs sit completed and waiting to be priced up. The engineer has been; the invoice has not gone.

WHO OWNS IT

Finance; commercial.

WHAT IT COSTS

£48,000–£95,000 of finished work waiting for an invoice, at £250–£500 a job (A4). It is cash, not efficiency: the fastest money in this report.

THE FIX, AND ITS COST

A price-up queue on the daily operating list, oldest first. Inside the Fix 9 Proof, no separate cost.

Fix 9 The job system already knows what is stuck. Nobody is working the list.

MEASURED

CASH · A4

WHAT WE SAW

Every open job read in full: **about 1,000 open, three in four past due**, a handful by more than a year. **Around 115 are waiting on a return visit** (parts required, a second person, an abortive call-out), flagged by the engineers' own app and mostly overdue. **On Hold is where jobs die**: about 30, nearly all overdue. More than 20 job statuses in use, and nobody working to a list.

WHO OWNS IT

Helpdesk and scheduling; account managers.

WHAT IT COSTS

£36,000–£73,000 of cash held up: about 145 jobs waiting on a return visit or a decision, at £250–£500 a job (A4), none of which can be invoiced until someone moves it. Before any SLA credits.

THE FIX, AND ITS COST

A **daily operating list**: a handful of buckets instead of 20-plus statuses, each job in front of the person who moves it. Read-only (it changes nothing in the job system), so it runs on live data from the first day. Prove £2,500; run cost agreed before it goes live.

● 04 · THE ASSUMPTIONS

Every assumption on the page, and where your real figure comes from.

Counts, hours and call volumes come from the systems. Turning them into pounds takes eleven more inputs. Fernmoor isn't real, so here they are assumed. In your Diagnose, nine become your own figures or are timed during the three weeks, one is our price, and one can only be measured once the fix is running. The last column says which.

REF	ASSUMPTION	VALUE USED	BASIS IN THIS SAMPLE	IN YOUR DIAGNOSE
A1	Fully loaded cost of a desk, admin or survey person	£32,000 a year, £18.80 an hour	Over 1,702 working hours (37 hours × 46 weeks); the same hours define an FTE throughout	Your figure : payroll cost of these roles, with on-costs
A2	Off-phone work around each chase call	None, up to as long again as the call	Call time is measured; logging updates and emailing contractors is not in the phone log	Timed : 20 chase calls followed from pick-up to the last update logged
A3	Night premium	0–25% on night hours	Illustrative range	Your figure : night shift pay rates
A4	Average value of a reactive job	£250–£500	£250 is a common not-to-exceed limit on routine reactive jobs in the operations we drew on	Your figure : average reactive invoice, from the finance system
A5	Jobs credited or disputed over a bad job card or missing photos	0.25–0.5% of 30,000 jobs a year, at £350	Job volume from the job system; the rate and value are illustrative	Your figure : three months of credit notes, with the reason for each
A6	Month-end reporting rebuilt by hand	2–5 days a month	Illustrative	Timed : one month-end report, sitting with the person who builds it

REF	ASSUMPTION	VALUE USED	BASIS IN THIS SAMPLE	IN YOUR DIAGNOSE
A7	Mobilisation effort	One person, half- to full-time for eight weeks; two contracts a year	Illustrative	Your figure: who worked on the last mobilisation, and for how long
A8	Survey retyping	20–40 minutes a survey, 10 a week	Illustrative	Timed: five surveys followed from site to quote
A9	Running cost of the software desk operator	£25,000–£45,000 a year	Indicative: a monthly fee plus a per-call charge on 81,000–106,000 calls a year; fixed with the client before anything goes live	Our price: quoted in the roadmap, fixed in writing before anything goes live
A10	Share of new-job, chase and contractor calls the software operator takes	60–80%	Illustrative; the operator is proven on real calls to a working desk line, in a test queue	Measured in the Prove: it can't be known until it runs on your own line
A11	Time per manual crossing between systems	10 minutes each way	Illustrative	Timed: 20 crossings, each way

● 05 · WHAT WE STILL REFUSED TO SAY

Some numbers **we won't put a price on.**

An assumption with a stated basis is honest. A number that would mislead the board is not, so these stay out of the total.

REF	WHAT WE WOULD NOT PRICE	WHY	WHAT WOULD PRICE IT
Fix 10	The open quote book, as a pipeline	Nobody has reconciled which quotes are live, won, lost or duplicated, and calling it a pipeline would flatter the business	A reconciliation of open quotes against clients
Fix 2 · Fix 9	Contracts lost to missed SLAs	A lost contract is not an hours number, and three in four open jobs past due make it a live risk	Renewal dates and the SLA record for each client
Fix 11	Risk from tools on private accounts	A continuity problem, not an hours one	The tools register itself

Cash and read-only first. Then the writes, one proven at a time.

Sequenced by value, by evidence and by risk: nothing writes to a live record until it has been proved against a copy seeded with the operation’s own jobs.

NOW · WEEKS 1-2

Daily operating list (Fix 8, Fix 9)
Read-only, on live data; up to £168k of cash in front of the people who release it. Prove £2,500.

Connector Proof (Fix 1)
Against a seeded copy of a client’s CAFM. Prove £2,500.

Tools register (Fix 11)
Every account, agent and connection found; one company workspace.

NEXT · MONTHS 1-3

Connector build (Fix 1)
Both directions, read back and verified. £6,000.

Software desk operator in a test queue (Fix 2, Fix 3)
Real calls, jobs raised against the client’s own questions.

Job card and evidence (Fix 4)
Cards cleaned before the customer sees them; attachments carried.

LATER · MONTHS 3-6

Software desk operator live (Fix 2, Fix 3)
First client cluster, out of hours included.

Mobilisation tool (Fix 5)
The next contract loaded, not typed.

Validation at raise (Fix 6) and survey capture (Fix 7)
Reporting that falls out of the system.

Not described. Shown running, on the operation’s own sites and jobs.

The day’s list is part of every Diagnose. The call demonstration is added where the operation runs a desk on a CAFM we support. Both are illustrative, not production: they show the fix working so the board decides on something it has seen.

DEMONSTRATION	WHAT THE BOARD SEES	REF
The software operator, answering	Where the operation runs a desk and we already support its CAFM (VX Suite, Concerto, Joblogic and Arez today): a call to a demonstration line, answered by software: one of the client’s own sites identified, the fault taken, the client’s required questions asked, and the job raised in a test copy of their CAFM, with the reference read back before the caller hangs up.	Fix 2 · Fix 3 · Fix 6
The day’s list	This morning’s open jobs, read from the job system as it stands, sorted into the buckets the desk would actually work: return visits waiting on parts, jobs dying on hold, finished work waiting to be billed.	Fix 8 · Fix 9

Their systems, **their numbers, nothing changed.**

SOURCE	HOW IT IS READ	REF
Job system	Signed in read-only; every open job and every status counted, not sampled. Every request logged, so it can be shown that nothing was written.	Fix 8 · Fix 9 · Fix 10
Client CAFMs	Mapped screen by screen and field by field, read-only.	Fix 1 · Fix 5 · Fix 6
Phone log	Three months, every call: direction, talk and after-call time, and the outcome each agent recorded.	Fix 2 · Fix 3
Desk rota	A month of shifts: hours, agency and night cover.	Fix 3
Call recordings	A sample, listened to for how the desk actually takes a job.	Fix 2
Walkthroughs	The people who do the work (administrators, coordinators, surveyors), not only their managers.	Fix 4 · Fix 7 · Fix 11

WHAT THE CLIENT KEEPS

This report and **the evidence behind every number** (the job lists, the call breakdowns and the calculations), along with the assumptions, the refusals, the roadmap with fixed prices for the first Proofs, and the tools register. What stays ours is the tooling: the system maps and configurations we use to read and work your systems.

ProofWorks

Your operation, read the same way.

Diagnose from £7,500, fixed before we start, about three weeks: every system read, every job counted, every leak priced on your own numbers, and the fixes shown running on your own jobs. Then **Prove** the one you choose, £2,500 fixed, two weeks.

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