



## Case study

Name: Domestic Boiler Installation  
Sector: Field Service  
Location: Head Office, Leeds

## Installing a productivity centred approach, with a central heating installer

This UK domestic boiler installer needed support to regain control of their operations. With an acquisition by a household name in home services and emergency repairs, they were forecasting a significant increase in work.

Management recognised that current issues would prevent successful delivery when fully integrated within the new owner. A solution needed to be applied that would enable more effective delivery of the current workload and also strengthen the business to prepare it for the future.

By working across the end-to-end organisation, Managementors was able to address key issues causing the business pain. This enabled the operational teams to embed new ways of working, focused on driving productivity through active management of field teams.

### Key challenges

- Lack of active management within the field, with supervisors feeling their key role was to audit and not manage their teams
- Excessive levels of engineer overtime claimed as a result of poor planning and limited management visibility
- Issues normalised as BAU due to inaccurate sales surveys
- Ineffective approach to scheduling work, causing significant levels of hidden wastage built into the plan, for engineers to hide behind

### Key gains

- Action focused culture to address issues and enhance collaboration between business units
- Increased visibility of engineer performance, with a proactive field management team
- Job scheduling maximising available resource, through the introduction of productivity reporting
- £1.2 million of agreed annualised benefits; achieved by:
  - o Reduction in overtime spend
  - o Reduction in costs incurred through inaccurate sales surveys
  - o Streamlined headcount through restructure
  - o Driving employed installer productivity

## The Challenge

Operating nationally with a team of internal gas engineers and electricians, and a network of contractors to support delivery, this UK central heating installer was on a turnaround journey. Struggling to breakeven, and with a significant increase in the volume of work expected through its acquisition, the business needed support to deliver improvements.

Whilst internal initiatives had enabled the 'low hanging fruit' to be obtained, the client looked to Managementors to support them in identifying the root-cause issues impacting operational performance. An in-depth review of the end-to-end operations took place.

The review confirmed that there was substantial opportunity for improvement. The quality of information provided by sales surveyors was poor and there was insufficient value being added by the Technical Team who reviewed the surveys. Work was not being effectively planned and was poorly controlled, leading to high levels of jobs overrunning, excessive overtime and poor customer satisfaction. The absence of effective productivity measures, combined with gaps in the Management Operating System and little in the way of active supervision, meant that the level of performance was unlikely to improve unless fundamental change was implemented.

*“Working alongside the planners was transformational. Previously it had been perceived as impossible to plan more than one job a day, but through the use of data and with support from the field supervisors, planning quickly went from an administrative function which just booked jobs on the planner to a hugely value adding team driving the productivity of the field workforce.”*

Charlie Burtt,  
Practice Director,  
Managementors



## Our Approach

To enable sustainable change within the business, Managementors was engaged to support management across all teams; from field surveyors, through to back-office planning, and the engineers. By working across the end-to-end operation, Managementors could develop and implement new ways of working to address the gaps within the Management Operating System.

Vital to success was the ability to change people's perspective and ways of working. Close coaching enabled employees to embrace new ideas and by changing behaviours, demonstrable improvement was achieved.

Three key areas of focus were identified to deliver success:

### 1) Driving active management through the field

The initial review had highlighted weak active management within the Field Management team. Supervisors were not aware of how they could maximise their impact over engineer performance, and so, alongside the Operations Manager, a series of Active Management training workshops were delivered. These looked to increase understanding of the key principles of a Management Operating System, and encourage supervisors to realise their role in removing issues to drive team performance.

One tool that the supervisors found of significant value, was training to conduct 'day in the life of' studies. By putting the Supervisor in their engineers' shoes, they were able to identify further issues and help define best practice standards to be rolled out across their teams. Issue logs were also introduced, to allow engineers themselves to identify issues impacting performance; which could be escalated through the management chain.

Standard Days were developed with the supervisors to help structure a typical day. This included daily check-ins with their engineers to identify concerns early on, rather than firefighting at the end of day. By increasing visibility of issues, supervisors had more insight to inform decisions through the day – this included moving engineers around to help complete works and also when to approve late working for overtime.

To support the review structure, operational indicators were developed to help senior management clearly understand output. The introduction of measures and targets against utilisation, effectiveness and productivity provided supervisors with the tools they needed to drive better outcomes for the operation. As supervisors embraced the role they now played, they realised the impact of good scheduling on their engineers' productivity. Improved communication between Field Management and the Planning Team identified improvements to the plan, and significantly enhanced collaboration with the planners.

*“The PGLs introduced really helped management understand what had been causing so many overruns and overtime issues with previous installations. Whilst it was challenging to embed this new approach to planning, by detailing the requirements per job, this enabled more effective scheduling – reducing the need to firefight at the end of the day.”*

Abi Bryce,  
Project Manager,  
Managementors



## 2) Effective scheduling to increase productivity

It was recognised that the current methods of work allocation were ineffective; and an internal project to install a new technology solution was underway. However, Managementors identified that the key issues resulting in significant wastage being built into the plan would not have been resolved by technology alone.

Jobs had historically been planned in days. An initial activity Managementors conducted was to work with experienced installers to develop a suite of Planning Guidelines (PGLs) to provide a detailed breakdown of job durations. This highlighted that the simplest of jobs could be completed in just over 5 hours; the 'days' unit of measurement was masking the actual planned work times. It quickly became apparent that the high volumes of overrunning jobs were actually a result of the current 'days' not reflecting the true duration of the work. PGLs were embedded into the planning process, which saw a reduction in the need for overtime and overrunning jobs, which not only reduced cost but also enhanced the customer experience.



Planning in more detail now enabled the planning team to begin to part-day plan, allowing smaller jobs to fit in. Where revisits had to be carried out, rather than losing a whole day for a short piece of work, these could now be tied into the day. This freed up full days to retain work in-house, improving the bottom line performance of the business.

Travel became a core focus when the productivity measures highlighted the need to increase the amount of 'tool time'. Simple checks were put in place to reduce the amount of planned travel by internal engineers, this included using 'Arrive by' features to understand the impact of peak times on the roads. By setting a maximum travel time, this helped inform resource strategy and where to focus recruitment efforts, either internally or to establish new contractor connections.

Close coaching with the planning team leaders on the operational indicators saw a shift in how the team approached plans. A new focus developed not just on "getting the jobs on the plan" but the planners thinking "how can we maximise our planned utilisation across this day/week?"

### 3) Improving survey quality

Like any process, the output relies on good quality information being captured at the front end. To drive an improvement in survey quality, issue capture methods were implemented within the Technical Team reviewing completed surveys. This enabled repeat offenders and causes to be identified. To address issues, a feedback process was established to ensure action was taken with surveyors, and survey issues reduced moving forwards.

It became apparent that understanding was the root cause of many initial issues. To address this, drop-in technical sessions and training on specific topics were delivered to improve quality from the weaker performers. Once targets were introduced based on the quality of surveys, this too helped incentivise an increase in performance.

Finally, the surveys were completed within a tablet application. To strengthen this framework a working group was set up to review and redesign elements of the form used. Changes were recommended to the application team, to support more detailed information capture, providing better insight to the engineers who would deliver the work. This helped to reduce install issues and costs further down the line.

*“The significant changes required across all teams should not be underestimated in a project like this. At times it was challenging to adapt to the new ways of working, however with support from the senior management team staff soon began to feel the benefits on the ground – issues which had always felt like ‘part of the role’ started to dissipate.”*

Abi Bryce  
Project Manager,  
Managementors



## Outcomes

Identifying the root-causes behind the installation organisation's challenges enabled a 6-month improvement programme to design, develop and implement changes to the ways of working. Targeted tools and coaching with the operational teams allowed management to take back control of the operation, and start to drive performance through productivity.

To enable the step-change in performance, this business underwent a significant shift in behaviours. The operation was now equipped with a Field Management team who actively reduced issues, and supported their team in delivering the best outcomes for the business. Collaboration between departments also improved, as action-centred reviews enabled issues to be escalated and addressed at root cause. This more active organisation highlighted the opportunity to restructure the senior operational management team, as issues could be resolved before escalation.

The approach taken enabled a reduction in costs incurred through survey errors, and operational costs as a result of poor planning practices – subcontracted work, overtime, overruns. Combined with the productivity focus, the business recognised £1.2m in benefits.

This central heating installer now had a solid operational platform from which to grow, providing the sustainable changes needed to react to changing volumes driven through their acquisition.

*"Reflecting back on the project, it's really clear to see the journey which the business and the people within it have come on over the last few months. The changes have embedded really well and everyone is now in a position to take the operation to the next level."*

Charlie Burt, Practice Director, Managementors

Contact us to find out what Managementors can do for you

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