

## Case study

# Growth through Clarity – Improving efficiency and delivery

PTSG’s software development team has built the Clarity system – a unique, non-manual administrative system which uses hand-held technology service to improve the business’s day-to-day operations. Clarity makes the Group’s processes much quicker by allowing for more effective scheduling, real-time engineer tracking across the UK, and more direct customer communication.

### What is Clarity?

The system is made up of four key components. Each is designed with the specific requirements of individual departments in mind, ensuring that everyone at PTSG, including the administrative team, business development managers and on-site engineers are able to do their jobs more efficiently.

#### ClarityWORK

**Used by**  
PTSG’s engineers.

**What does it do?**  
ClarityWORK is an advanced mobile workforce system that provides PTSG engineers with everything they need to do their job safely and efficiently, including sat-nav, real-time engineer location tracking and a job recording and submission facility.

#### ClarityPORTAL

**Used by**  
PTSG’s clients.

**What does it do?**  
ClarityPORTAL is a secure and easily accessible platform for clients to log requests and view real-time information on their jobs and accounts. This aspect of Clarity is designed to keep everyone involved in the job, whether at PTSG’s offices or the client’s, fully informed and enables PTSG to respond efficiently to any requests.

#### ClaritySALES

#### ClarityOFFICE

**Used by**  
All PTSG employees.

**What does it do?**  
ClarityOFFICE and ClaritySALES are the back-end administrative systems that provide comprehensive group-wide resource planning and customer relationship management functionality.

### What are its benefits?

PTSG Clarity was designed to unlock growth through powerful innovation, and it does exactly that. The bespoke, proprietary system is allowing us to operate effectively and efficiently, ultimately reducing costs and bringing an all-round better service to our customers.



**INTUITIVE**  
From the time a purchase order is generated to when the job is completed and invoiced, all processes and ‘paperwork’ (which is actually electronic) are automatic. The system responds immediately to project developments.

**SCALABLE**  
An integral part of Clarity is the processing of data. In the scheme of PTSG’s operations, huge amounts of data are generated every day and it is essential to manage this. Clarity enables users to track, view and assess all developments in any given project.

**SAFETY**  
Clarity looks after the safety of workers via a formal framework of checking and verifying the status of lone workers, to ensure the safety of any staff entering a location alone. It also ensures online safety, via a secure portal.

**REAL-TIME**  
The ClarityWORK app uses sat-nav to track the engineer in real time during their designated working hours. This also relays the current road conditions, calculating an accurate estimated time of arrival for both office and client. This enables work to be scheduled more effectively and contingency arrangements to be made if any problems arise with a journey.

**MOBILE**  
The nature of PTSG’s multi-disciplinary work means that all engineers work remotely, in all kinds of locations – thousands of feet in the air or underground. To accommodate this, the ClarityWORK app is designed to run on a mobile device and operate fully, even when the engineer has no data signal – it simply synchronises automatically when the signal is available again.

**EFFICIENT**  
Engineers can use ClarityWORK to record their current status in relation to their schedule, detailing which job they are currently travelling to, time of arrival on site and when the job is completed.

Whilst on site, Clarity’s task system allows the engineer to undertake and document the required service delivery. Clarity’s automated workflow generates and issues any required worksheets and certificates.

**PAPERLESS**  
Paperwork is time consuming, inefficient and gives rise to human error. Clarity is a solution to manage the documenting of information automatically, giving users instant results.



### What is the outcome for PTSG?

Since Clarity began to be implemented, PTSG has been:

- ❖ Working in a way which is more efficient and cost effective.
- ❖ Putting more engineers out on location, or moving between sites.
- ❖ Keeping customers closer to the work the Company does on its behalf, including quickly identifying other necessary remedial, repair and renewal work.
- ❖ And when the system is fully implemented throughout the Group, efficiency will be maximised and customers can look forward to an even higher level of service.

### Q&A

We talk to Jason Sheehan, an engineer at PTSG about how the Clarity platform has improved his work.

#### What are the main benefits for you?

For me as a user of the Clarity system, the benefits are the saving of a lot of time, greater efficiency and the reduction in human error.

#### What about the connection between you and office-based colleagues?

Office staff can see if I or another engineer have arrived on site or how far away I am. This eliminates the need to call me and the customer back. The office can also view which engineers are away from any internet connection, which makes weekend working issues easier to sort out.

#### How does it enable you to serve your clients better?

Firstly, we are spending more time doing the work as opposed to administering it – we are so much more productive. The time saved on not having to match worksheets to jobs, marking up, scanning and attaching to the jobs is time spent on pulling a more efficient and higher-value programme together, sending out quotes and basically carrying out tasks to keep our clients better serviced, which also applies to the automatic generation of certificates.

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### Our people – Sarah Lythall Clarity Project Manager

Sarah is a great example of a PTSG employee whose skills and talent have been nurtured and developed during her time at the Company, resulting in her progression to her current position of Clarity Project Manager.

Sarah joined PTSG in 2008 and remembers the Company as being “modestly sized and feeling like a family-run business.” “Back when I started, PTSG only supplied Access and Safety services to the facilities management industry – cradles and fall arrest equipment. As the Company quickly grew, separate divisions were formed to cater for each customer’s unique requirements.”

PTSG remains the UK’s leading supplier of fall arrest systems and safety testing services, encompassing maintenance, inspection and testing solutions for safety at height as well as the design and installation of permanently installed façade access equipment and fall arrest equipment. Access and Safety now represents one quarter of the Group’s provision of niche specialist services to the industry.

#### Career progression

Sarah cites the opportunity to progress her career as one of the best and most important aspects of working for PTSG. Based at the Group’s headquarters in Castleford, Sarah began as a Sales Assistant. Taking advantage of PTSG’s training and development programmes, and the advice of the specialist personnel around her, and with a little hard work and dedication she quickly progressed to Maintenance Manager for the Cradles Maintenance division, combining this with trialling new data base systems.

Today, Sarah holds the position of Project Manager for implementing the new bespoke Clarity system around the Company. Having been using Clarity and seeing it come to completion over the past year, she says her duties as Maintenance Manager have been transformed by the revolutionary administration system.

#### Administration transformed

When Sarah joined PTSG, all processes were handled manually, with engineers’ worksheets being posted at the end of the week and having to be scanned to provide a copy to the client, with a seven-day lead time before quotations could even be started – with Excel being the main document of use. In 2011, the Cradles division trialled an off-the-shelf system, which was a major step toward the decision to create a bespoke system; by identifying the limitation of this system, the bold step was taken to design a system to suit PTSG’s company needs, with the ability to be adapted as it continues to grow and change.

Sarah had the opportunity take part in the trial, which in turn gave her the opportunity to be involved with the development of Clarity.

In 2016, the new system was trialled and is now implemented within PTSG’s Access and Safety division. Clarity is now taking the Company into the leading edge of the mobile and digital age.

The system provides PTSG’s engineers with everything they need to do their job safely and efficiently, including sat-nav, real-time engineer location tracking, and a job recording and submission facility with a lot less paperwork; this makes for happy engineers!

Back in the office, Sarah and her colleagues enjoy the advantage of the automated and instant generation of documents. This is crucial in reducing the workload, speeding up processes and freeing everyone up to do other, more profitable work. Clients are responding well to clear worksheets, same-day certification and quotation, giving PTSG the edge over other companies. It is not just the client and administrative processes that will benefit; sales staff will no longer have to keep a manual track of their figures, because all members of staff can access these at the click of a button. Credit control staff have instant access to any documentation a client is requesting to pay, and the system is fully text searchable; therefore, if a client rings with a site but no reference number, that is no problem. Similarly, if staff have a purchase order but no reference to what it is for, Clarity will tell them.


Clarity also reduces a lot of the ‘human error factor’; although this cannot be taken away completely, it helps significantly, and with the extra time allowed through automatic process, staff have extra time to check. There is full traceability of who has done what and the status of the job.

As Maintenance Manager for Cradle Maintenance, Sarah was part of the team already enjoying the more efficient way of working that Clarity allows. That efficiency will be experienced by all employees of PTSG as it is rolled out across each division in the Group over the next eighteen months which Sarah is now proud to be part of.

#### Opportunities to develop

Over the last nine years, Sarah’s progression at PTSG has been largely representative of the Group’s evolution. She refers to the opportunities she has been given to learn new skills, to work with a wide range of highly skilled people and pursue her career ambitions with no limitations.





“It’s definitely a progressive place to work. PTSG values its employees and if you have the ambition to learn and develop, you can quickly make advances in the Company.”



## Case study

### MOUSE in action – Committed to our values

Our people are the key to the success of PTSG. Studies have shown that happy workers increase business productivity by 12%.

#### Memorable

We talk to Pauline Starkey, Group receptionist.

##### Could you please tell us a bit about your role at PTSG?

My role is a varied one with lots of queries and questions – I'm essentially the first point of contact in the business. I enjoy dealing with the different clients and helping people whatever the nature of their query.

##### How does it feel to be named 'The Voice of PTSG'?

Due to the amount of time I spend on the phone I think everyone recognises my voice now. I like to think I come across as friendly and helpful but I'm not sure about being named 'The Voice of PTSG'!



#### Outstanding

We talk to Mark Brackenbury, Group Safety, Health and Environment (SHE) Advisor.

##### Could you please tell us a bit about your role at PTSG?

As the Group SHE Advisor a key role I play is ensuring the safety of PTSG's engineers, carrying out site audits, assessing our internal policies and procedures and making sure we're always doing what we can to maintain ISO standards.

##### How does a dedicated H&S department benefit PTSG?

It's great to see the reputation PTSG has in the industry for an outstanding commitment to health and safety, and the hard work everyone puts in to make sure our teams are always as safe as possible has been reflected in dozens of awards and accreditations.



#### Unique

We talk to Wayne Adams, Sales Director for Fall Arrest Installations.

##### How long have you worked at PTSG?

I have been the director for Fall Arrest Installations for more than eight years now. PTSG has a unique philosophy based on being a great place to work so that we are always a great place to do business with.

##### As one of the longest serving directors in the business, what do you like most about PTSG?

I love working with a team that is completely committed to driving the business forward by delivering a great service experience. It doesn't matter if you are on the front line or working behind the scenes here, we all want the same thing – to see PTSG succeed. This is reflected in what we do, how we do it and the results we achieve.



“Providing our customers with a good service results in us receiving numerous requests for new sites and additional buildings.”

“PTSG has an outstanding commitment to Health and Safety.”

### Service Experience

We talk to Sarah Wood,  
Group Renewals Manager.

#### Could you please tell us a bit about your role at PTSG?

My key objective is to renew all PTSG's existing contracts year after year.

Renewals are the bread and butter of the Company and it is our responsibility to make sure our clients feel valued and reassured, knowing they have a dedicated team working to ensure their buildings stay compliant.

In April 2014 a decision was made to centralise this process to our head office. As a result, renewals have increased from around 70 per cent to anything between 80 per cent and 85 per cent.

#### How does MOUSE benefit PTSG?

Providing our customers with a good service results in us receiving numerous requests for new sites and additional buildings, which can then be passed onto the relevant business development teams. This is a great, organic way of expanding our maintenance base.



## Case study

### Acquisition overview – UK Dry Risers

UK Dry Risers Ltd and UK Dry Risers Maintenance Ltd have seen exceptional growth following their acquisition by PTSG in July 2016, ending the financial year on a real high. UK Dry Risers Ltd carried out a record number of installations during its first six months as a PTSG business, with the total length of systems installed enough to cover over 440 football pitches.

#### Cross-selling opportunity

Majority of competitors only operate in single lines whereas PTSG operates across several.

The turnover of UK Dry Risers Ltd increased by 10 per cent in the six-month period following its acquisition. UK Dry Risers Maintenance Ltd also saw a significant increase of 37 per cent in its turnover. This is particularly pleasing as the installation business is more mature than its maintenance counterpart, so the great growth of UK Dry Risers Maintenance Ltd signals the division as a whole is moving rapidly in the right direction.

This is a text book example of the way PTSG's targeted business acquisition strategy brings mutual success for both the Group and the new company. The initial integration period, involving the change-over of accounting procedures and the rolling out of the Company's reporting suite, takes only two to four weeks, with the due diligence period typically taking between three and six months beforehand.

One of the main drivers for the acquisition was the potential for cross-selling the specialist services of the companies to PTSG's 15,000+ customer base, where before the companies serviced their existing customer base of 500.

Dry and wet riser systems are specially designed fire-suppression systems required in high-rise commercial and residential buildings. The risers are used to distribute water throughout all levels of the buildings in the event of a fire, allowing fire rescue teams to fight fires from outside multi-storey buildings.

With the acquisition of UK Dry Risers, PTSG's electrical services division now provides a more comprehensive fire services solution, helping to ensure the safety of electrical equipment, installing and maintaining emergency lighting and installing systems like these to protect buildings of all sizes from fire. However, there is considerable scope to develop this offering further, with services such as the installation and maintenance of fire extinguishers.

For now, PTSG and our new dry risers installation and maintenance team are relishing the potential for further growth, with the opportunity to work across the Group's vast customer base.





**Acquisition**

In 2016 PTSG acquired UK Dry Risers Ltd (UKDR) and UK Dry Risers Maintenance Ltd (UKDRM).

**Growth**

17%

Combined Dry Riser 2016 increase in turnover.

**Market**

**Market leading**

PTSG has the largest market share in the access and safety market, lightning protection and dry riser maintenance and installations across the UK. The Company uses this dominant position to affect the competitive landscape and direction the market takes – setting the tone for messaging and becoming engrained in the FM industry as the brand that consumers associate with the services it offers.

**New market**

PTSG has a strong track record of entering new markets, underscored by the 20 symbiotic business acquisitions it has undertaken in the last ten years. The business has diversified from access and safety into electrical services, high level cleaning and, in 2016, dry riser installation and maintenance.

**Opportunity**

**Cross-selling**

PTSG's business model is such that it can enter a market with one product and/or service before eventually becoming the service provider of choice across more areas. This was part of the founding business philosophy and is a key factor in PTSG enjoying such a high market share. Organisations in the FM sector tend to like this one-stop-shop approach.



**Delivering success**

Manchester Airport cross-selling opportunities.

A clear illustration of this strategy in action was a recent project at Manchester Airport. PTSG was initially contracted to carry out testing of the airport's fall arrest system. This was extended to its lightning protection systems as well as its dry risers. The resulting work gave Manchester Airport's management team the peace of mind that its staff and customers are as safe as possible at all times. They also enjoyed the convenience and cost-saving of not having to procure each service individually.