DISEÑO DE UNA ESTRUCTURA ORGANIZACIONAL CENTRADA EN PROYECTOS PARA LA EMPRESA CUMMINS NORTE DE COLOMBIA

ING. STEVEN RAFAEL ESCORCIA ESQUIVIA

UNIVERSIDAD TECNOLÓGICA DE BOLÍVAR
MAESTRIA EN GERENCIA DE PROYECTOS
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Diseño de la estructura organizacional centrada en proyectos para empresas.

GLOSARIO

Organigrama: es la representación visual de un conjunto completo de actividades implícitas y procesos en una organización. El organigrama puede ser bastante útil para entender cómo funciona una empresa. Muestra las diversas partes de una organización, su interrelación y la manera en que cada posición y departamento encaja en el todo.

Toma de decisiones centralizada: los problemas y decisiones se canalizan a niveles superiores de la jerarquía para su solución.

Toma de decisiones descentralizada: la autoridad de la toma de decisiones se delega a los niveles organizacionales más bajos.

Organización vertical: organización tradicional diseñada para la eficiencia, hace énfasis en la comunicación y el control vertical.

Organización horizontal: organización contemporánea que aprende, enfocada en la comunicación y la coordinación horizontal.

Vínculos verticales: se utilizan para coordinar las actividades entre niveles altos y bajos de una organización y están diseñados principalmente para el control de la organización.

Referencia jerárquica: el primer instrumento vertical es la jerarquía o cadena de mando, si surge un problema que los empleados no saben cómo resolver, se puede referir al siguiente nivel de la jerarquía.

Sistemas de información: son métodos significativos para ofrecer es una estrategia para aumentar la capacidad vertical de información o en su defecto ofrecer un vínculo horizontal. Incluyen informes periódicos, información escrita y comunicaciones por computadora que permiten un intercambio de información rutinario acerca de problemas, oportunidades, actividades o decisiones. de forma vertical estos sistemas hacen que la comunicación a través de la jerarquía sea más eficiente, mientras que de manera horizontal ayudan a mejorar la coordinación de los equipos y departamentos.

Vinculo horizontal: se refiere a la comunicación y coordinación horizontal entre departamentos organizacionales.

Integrador: es un instrumento de vinculación horizontal creado con fines de únicamente para efectos de coordinación, con frecuencia ocupan puestos como gerente de producto, gerente de proyecto, gerente de programa o gerente de marca. Usualmente no se encuentran en ningún departamento, sin embargo, tienen la responsabilidad de coordinar varios departamentos.

Agrupamiento funcional: congrega empleados que desempeñan funciones o procesos de trabajo o que aportan conocimientos y habilidades semejantes.

Agrupamiento divisional: son personas organizadas con base en lo que produce la organización.

Agrupamiento multifocal: en este agrupamiento una organización adopta dos o más alternativas de grupos estructurales, como por ejemplo por función y división de productos o quizá tengan que combinar características de opciones estructurales.

Agrupamiento horizontal: significa que los empleados se organizan en torno a proceso de trabajos centrales, el trabajo integral, información y flujos de material que ofrecen un valor directamente a los clientes.

Agrupamiento de red virtual: en este tipo de estructura los departamentos son organizaciones separadas que se conectan electrónicamente para compartir la información y completar las tareas.

RESUMEN DE LA TESIS

El trabajo de grado titulado "Diseño de una estructura organizacional centrada en proyectos para la empresa Cummins norte de Colombia", contiene el diseño de una estructura organizacional hibrida centrada en proyectos diseñada para la compañía según el análisis desarrollado a la misma, así como recomendaciones en estrategias de marketing que apalanquen el desarrollo de la compañía.

Esta estructura organizacional es una herramienta propuesta a la organización objeto de estudio para ayudarle a obtener un mejor rendimiento en la consecución de los objetivos estipulados por la corporación. Además de mantener el equilibrio tanto vertical como horizontal dentro de la organización, permitiendo el desarrollo a nivel horizontal de manera que se logren crear equipos de trabajo y exista un alto grado de colaboración entre los departamentos funcionales, buscando que los empleados a nivel puedan trabajar en torno a procesos centralizados, integrales, y que se permita un flujo de información y de material.

Esta estructura se basa principalmente en el modelo de negocios de la compañía y las recomendaciones del Quickserve playbook, además de estar soportada por las investigaciones actuales y recomendación acerca de diseño de estructuras organizacionales. De igual forma la investigación pretende entregar recomendaciones basadas en el diagnostico ejecutado en cuanto roles y responsabilidades, sistemas de información y estrategias de marketing, que le permitan a la organización hacerse en el camino hacia una gestión adecuada de proyectos y madurez organizacional.

Finalmente se logran implementar algunas de las recomendaciones consignadas en la actual investigación encontrando resultados satisfactorios en algunos casos, y observando como la ausencia de una cultura organizacional

y de proyectos no entrego los resultados esperados en otras situaciones.

INTRODUCCION

El trabajo de grado "Diseño de una Estructura Organizacional Centrada en Proyectos para la Empresa Cummins Norte de Colombia", desarrollado dentro del marco de la maestría en gerencia de proyectos de la universidad tecnológica de Bolivar, constituye un requisito para la obtención del título de magister.

La investigación desarrollada tiene como propósito definir una estructura organizacional centrada en proyectos para la empresa Cummins norte de Colombia, a partir de la cual la compañía pueda obtener un mejor rendimiento en la consecución de los objetivos estipulados por la corporación.

Debido al creciente desarrollo del mercado local Cummins Inc. ha puesto en Cartagena uno de los focos de desarrollo para el mercado latinoamericano más retadores de los últimos tiempos, estos nuevos retos han traído consigo responsabilidades ante la compañía totalmente superiores a las normalmente entregadas por el distribuidor y han obligado a las directivas a poner en marcha planes y/o estrategias que le permitan al distribuidor obtener estos resultados. Cummins Norte de Colombia en la ciudad de Cartagena tiene participación en los mercados, marino, industrial, agrícola, portuario, automotriz y generación marina, con un aproximado de 1000 motores distribuidos en todos los segmentos. Teniendo en el sector industrial y marino comercial el mayor potencial.

Las empresas locales relacionadas con la venta y prestación de servicios a motores diésel y de combustible alternativo están implementando estrategias que les ayuden a cumplir sus metas financieras, estrategias tales como metodologías en gestión de proyectos puesto que con este tipo de metodologías han logrado realizar un mejor manejo en cuanto a gestión de interesados, niveles de incertidumbre y alineación de sus empleados con los objetivos de la

compañía. Las empresas locales deben ser competitivas y mantenerse dentro de las expectativas de clientes puesto que segmentos como el portuario y el marino pueden verse afectados con la migración de clientes a mercados vecinos como lo son los mercados portuarios y marinos de la zona caribe y centro americana. Las estructuras organizacionales son un punto clave dentro de toda organización puesto que una estructura organizacional claramente definida ayuda a agilizar procesos y a reducir las barreras internas y externas generadas para los interesados. A partir de una estructura bien definida los líderes de las compañías pueden tener una panorámica más clara de los cargos, y como estos pueden ser usados de manera estratégica para los intereses de la compañía.

1. PROBLEMA DE INVESTIGACIÓN

Actualmente la dinámica de los mercados locales se encuentra en constante crecimiento y dinamismo, con lo cual las compañías que ofrecen servicios y/o productos se encuentran en la obligación de adaptarse a todos estos cambios y poder satisfacer la necesidad de sus clientes sin desviar su camino de la estrategia y políticas de la compañía. En el caso de Cummins norte de Colombia, empresa fundada en abril de 2013 perteneciente a la multinacional Cummins Inc. la cual vende y brinda servicios a motores diésel y de combustible alternativo de 2,8 a 95 litros, grupos electrógenos diésel y de combustible alternativo de 2,5 a 3,500 kW, así como componentes y tecnología relacionados; Esta situación no ha sido ajena convirtiéndola en la actualidad en una empresa solida con presencia en la costa norte colombiana cuya misión es la de proveer potencia para mejorar la vida de las personas y crear un mundo más próspero.

Esta compañía basa su modelo de negocio en el sistema operativo de Cummins COS (por sus siglas en ingles), el cual es la base para llevar a cabo mejoras en nuestros procesos y servicios, optimizando el tiempo invertido en ellos. Mediante el COS Cummins les permite a sus empleados identificar problemas de manera anticipada, pues el principio fundamental del COS son los procesos, como se ejecutan los trabajos, y como estos conducen a los resultados esperados. El corazón del COS son sus 10 practicas las cuales pueden aplicarse a toda la organización, independientemente del negocio o la función (ver imagen 1). Gracias a esta práctica la compañía ha presentado un constante crecimiento y fortalecimiento en los mercados durante el transcurso de los años lo que ha llamado la atención del corporativo, y le ha exigido mejores resultados con el transcurrir de los años.

Figura 1.Modelo de negocios de Cummins. (Cummins Inc.)
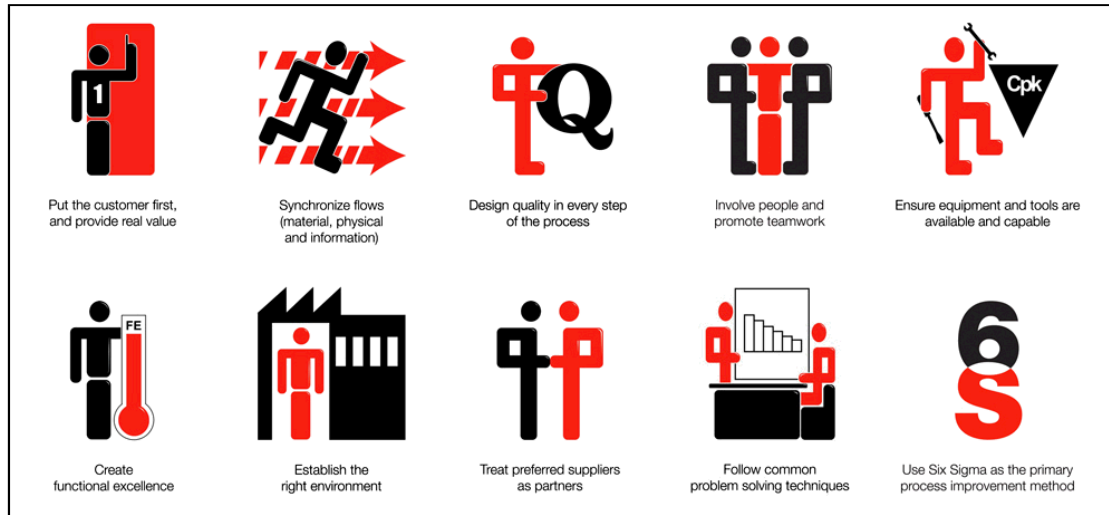
Estas exigencias obligan a la gerencia a poner en marcha estrategias que permitan cumplir con cada uno de los proyectos y necesariamente la contratación de más recurso, Entregando a la corporación las cifras esperadas, pero en circunstancias no tan cómodas en muchas ocasiones. Sin embargo, estas estrategias han sido temporales y las diferentes áreas han presentado un aumento en el número de proyectos en proceso y en el trámite y cierre de los mismos, la ausencia de una estructura clara y definida le impide a cada área la oportunidad de poder darle el manejo adecuado a todos los proyectos y realizar los cierres dentro de los tiempos esperados. Esta situación trae consigo a la compañía resultados un poco sesgados en cuanto al desarrollo y crecimiento del área pues en la mayoría de situaciones se están incluyendo la gestión de algunos proyectos en tiempos fuera de donde estos fueron planificados, generando alteraciones dentro del forecast y el AOP. La falta de sincronización en los flujos de información no garantiza la coordinación y la adecuada integración entre los departamentos y diferentes niveles jerárquicos.

Adicionalmente algunos retrasos e inconvenientes durante la gestión de los proyectos están generando pérdidas de

oportunidades e inconvenientes con los clientes. Puesto que en muchas de las situaciones al no gestionar de manera adecuada las diferentes etapas de los proyectos, nuestros clientes quedan con pendientes financieros por la no aceptación de los trabajos o por el retraso en el cierre de los mismos, lo cual genera bloqueos de tipo financiero y en ocasiones la perdida de los clientes. Todos estos inconvenientes no le permiten a la compañía alinearse al modelo de negocios global, en el cual se dice que debemos colocar al cliente primero y entregarle valor real en cada una de nuestras intervenciones.

En este orden de ideas surge el interrogante, ¿Cuál será la estructura y/o metodología más adecuada para la ejecución de proyectos en la compañía Cummins Norte de Colombia?

2. ARBOL CAUSA-PROBLEMA-EFECTO

Figura 2. Árbol causa-problema-efecto.
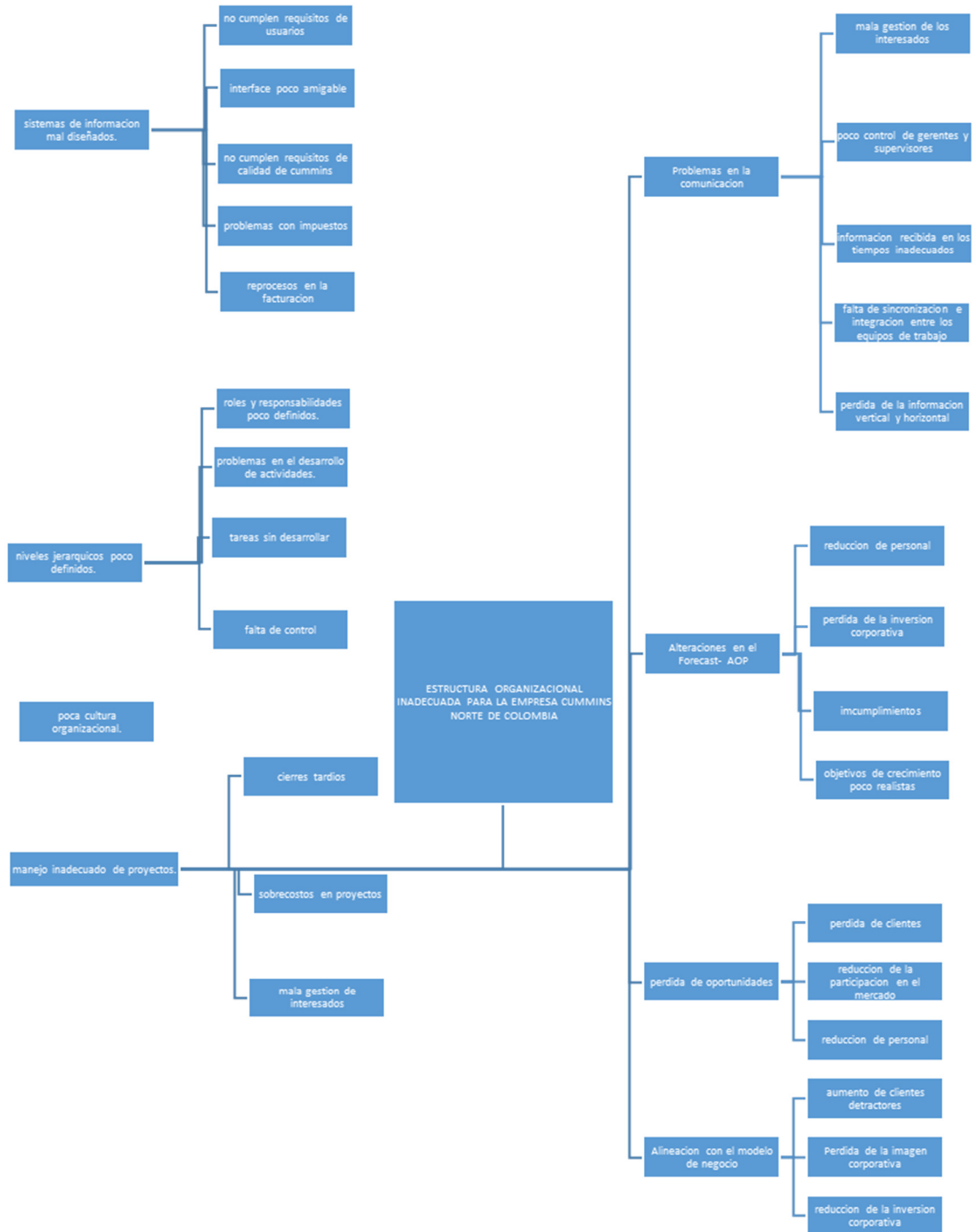
3. OBJETIVOS

3.1. OBJETIVO GENERAL

Determinar la estructura organizacional centrada en proyectos más adecuada para la empresa Cummins Norte de Colombia, que permita su fortalecimiento alineado a la estrategia de la compañía.

3.2. OBJETIVOS ESPECÍFICOS

- Hacer un diagnóstico de la situación actual de la compañía objeto de estudio.

- Proponer metodologías de proyecto que le permitan a la compañía mejorar los niveles de incertidumbre dentro de la planeación del forecast y el AOP.

- Formular estrategias de marketing que le permitan a nuestros clientes conocer los programas de competitividad ofrecidos por la compañía.

- Proponer la estructura organizacional más adecuada para la organización que le permita mantenerse alineada con el modelo de negocios de la corporación.

4. JUSTIFICACIÓN

Para Cummins Norte de Colombia es indispensable el poder entregar valor real a cada uno de sus clientes tanto internos como externos, y como lo habíamos mencionado antes el COS le permite a la compañía y a sus empleados anticiparse e identificar problemas que puedan afectar dicho modelo de negocio, cada una de las prácticas del COS es indispensable en la dura misión de entregarle valor real al cliente, puesto que funcionan como una cadena que al romper uno de sus eslabones puede generar traumatismos en sus procesos.

A partir de esto, es indispensable poder encontrar una estructura organizacional centrada en proyectos que le permita a la compañía la correcta ejecución de sus proyectos sin poner en riesgo ninguna de sus estrategias, y mucho menos su modelo de negocio. Con esta nueva estructura será posible identificar cuellos de botella y/o falencias en los procesos a partir de los cuales se generarán recomendaciones que permitan mejores niveles de satisfacción en los clientes tanto internos como externos, y evidencie una mayor eficiencia y sincronía a la hora de desarrollar los proyectos. De igual forma al proponer una cultura organizacional proyectizada será posible para la empresa Cummins Norte de Colombia definir de manera más fácil como ejecutar su desarrollo en la búsqueda de la madurez organizacional, a medida que estos comiencen a observar los beneficios relacionados con la madurez y el mejoramiento continuo.

5. MARCO REFERENCIAL

5.1. MARCO TEÓRICO

El diseño de una estructura organizacional ayuda a armonizar los recursos de las compañías, de manera que cada labor desarrollada sea llevada a cabo según los lineamientos y estrategias de la compañía. Se debe tener en cuenta que todas las organizaciones buscan ser eficientes y competitivas, por lo cual estas deben buscar cómo adaptarse a los constantes cambios de la economía global y el mundo al cual estamos expuestos.

Teniendo en cuenta la misión, visión y valores (filosofía organizacional), así como los recursos humanos, tecnológicos, financieros y materiales, el diseño de una organización es capaz de lograr la obtención de los objetivos ya determinados por la compañía. El desarrollo de una estructura organizacional juega un papel importante, del cual se involucra un esquema formal de relaciones, comunicaciones, procesos de decisiones, procedimientos y sistemas dentro de un conjunto de unidades, factores, materiales y funciones para la consecución de objetivos. Algunos de los factores clave dentro de una estructura organizacional es el designar relaciones formales de subordinación, como el número de niveles en la jerarquía y el tramo de control de los gerentes y supervisores, identificar el agrupamiento de individuos en departamentos y a su vez el de departamentos en la organización total. Toda estructura organizacional incluye el diseño de sistemas para garantizar la comunicación, coordinación e integración entre departamentos. Con estos aspectos toda organización logra definir los aspectos vertical y horizontal de su estructura, los cuales deben proporcionar el flujo de información necesario para alcanzar las metas generales de la organización.

Algunas organizaciones son diseñadas con el énfasis en la eficiencia y el control asociándose con tareas

especializadas, jerarquía de autoridad, reglas y reglamentos, sistemas de información formales, pocos equipos o fuerzas de tarea y la toma de decisiones centralizada, con lo cual se intenta canalizar todas las decisiones en niveles superiores. De igual forma algunas organizaciones se estructuran con énfasis en el aprendizaje y la adaptación a tareas compartidas, jerarquía relajadas, pocas reglas, comunicación directa, grupos de trabajo y toma de decisiones informal y descentralizada. Al compartir la información de forma vertical se pretende coordinar las actividades entre los niveles altos y bajos de la organización y así obtener total control de la organización desde los mandos altos, pues se pretende que los niveles más bajos de la organización cumplan con las metas y actividades conforme a los requerimientos de alto nivel, y los mantengan informados sobre las actividades y logros de los niveles más bajos. Por otro lado, cuando se comparte la información de forma horizontal se pretende superar los obstáculos entre áreas y equipos de trabajo y que estos alcancen la coordinación, es normal que en muchas organizaciones no se tracen los vínculos horizontales dentro de los organigramas, sin embargo, estos resultan ser una parte vital de la estructura organizacional.

Con intenciones de garantizar la comunicación todas las organizaciones diseñan sistemas de información para ofrecer vínculos y/o aumentar la capacidad de control de la información. Los sistemas de información verticales tienen como finalidad aumentar la capacidad de vertical de información normalmente las compañías definen informes periódicos, información escrita y comunicaciones por computador, de esta forma se intenta hacer que la comunicación a través de la jerarquía se lleve a cabo de un modo más eficiente. De igual forma en cuanto al uso de sistemas de información de forma horizontal o mejor conocidos como transfuncionales, permiten a toda la organización un intercambio de información rutinario acerca de problemas, oportunidades, actividades o decisiones, estos sistemas deben permitir a los empleados de la

organización la cooperación de tal forma que sea posible compartir conocimientos e interactuar entre áreas o proyectos para ofrecer mejores soluciones a los clientes.

Figura 3. Relacion del diseño de estructura vertical vs horizontal (Daft, 2011)
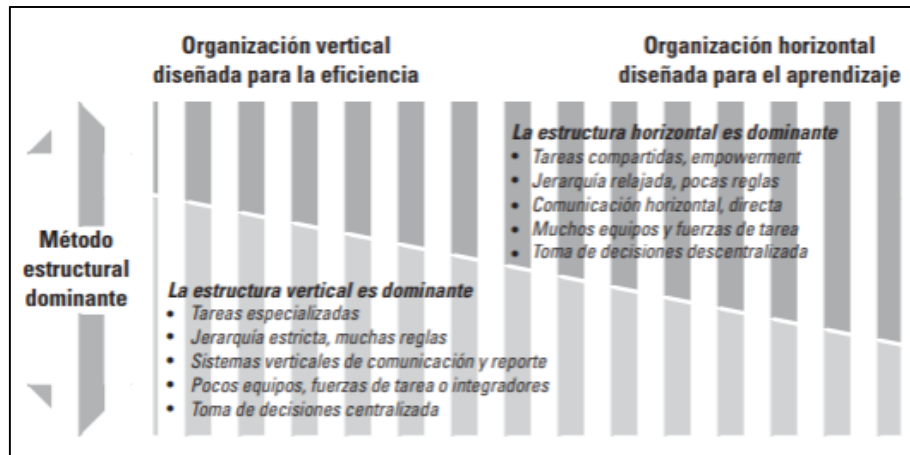
En algunos casos se hace común el uso de integradores de tiempo completo a quienes se les asigna una responsabilidad en particular sin embargo este no se encuentra relacionado directamente con ningún departamento. Usualmente es utilizado en proyectos de innovación, cambios, coordinar diseños o marketing. Todo integrador tiene un rol de líder por lo cual es importante que maneje adecuadamente el trato a otros, para mantener la confianza y enfrentar problemas, así como solución de conflictos e intereses de la organización; en la figura 3 podemos observar cómo es la posición de un integrador.

Figura 4. Ubicación de integrador de una estructura organizacional. (Daft, 2011)
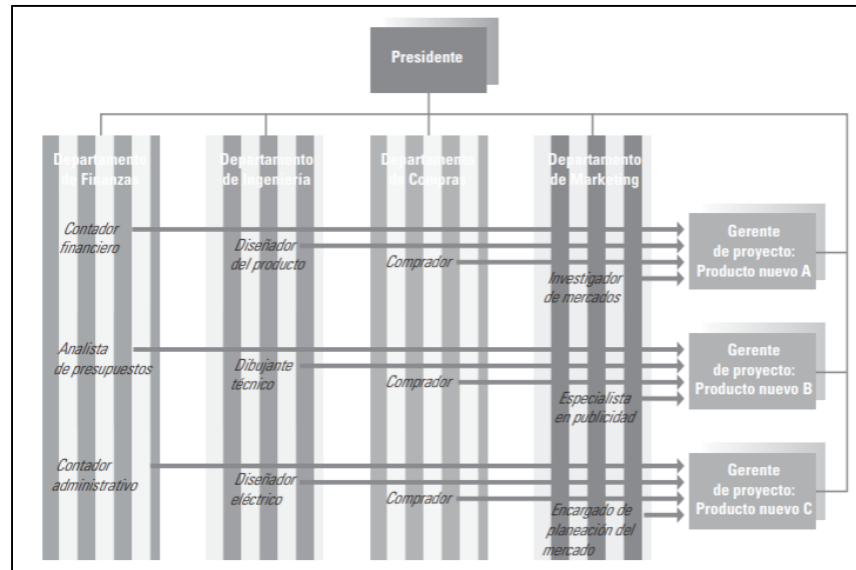
En la figura 3, también podemos validar como un equipo es un mecanismo de vinculación horizontal dentro de una estructura organizacional, se puede decir que son fuerzas de tarea permanentes por lo que es uno de los mecanismos de coordinación y vinculación más fuerte. En la figura 4 resumimos algunos de los mecanismos de vinculación más comunes empleados por las estructuras organizacionales.

Figura 5.Escala de mecanismos empleados para la vinculación y coordinación dentro de una estructura organizacional. (Daft, 2011)
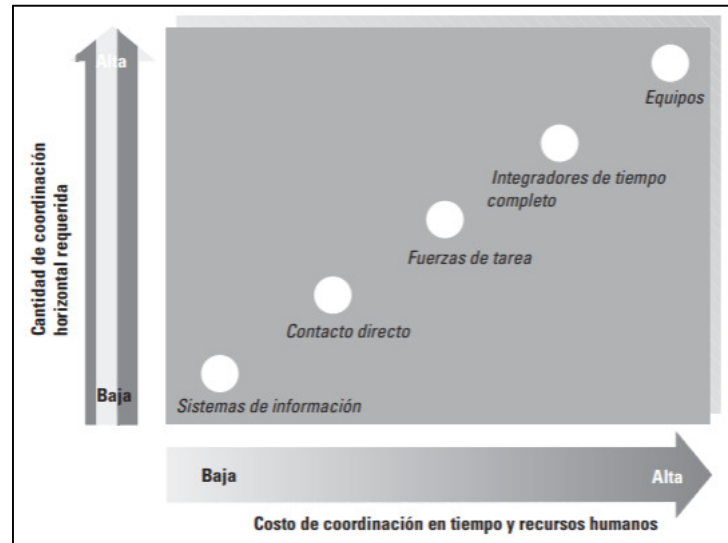
para poder llevar a cabo un diseño de una estructura organizacional de manera adecuada siempre es necesario tener en cuenta aspectos como: actividades requeridas, referencia jerárquica y agrupamiento entre departamentos. Cada área o departamento dentro de una estructura organizacional es creada bajo una consigna o función las cuales son consideradas estratégicamente para los intereses de cada compañía. Cada puesto o división ya sea nuevo o existente es una forma de lograr nuevas tareas que la organización puede considerar valiosas, claramente conforme una organización es más grande la necesidad de realizar mayor número de tareas aumenta. A medida que se tienen definidos divisiones, puestos, departamentos y actividades de trabajo, es importante definir cómo será la referencia jerárquica o cadena de mando de cada actividad a ejecutar. Esta debe ser una línea de autoridad ininterrumpida que incluye a todos los interesados dentro de una organización y muestra cómo debe desarrollarse la comunicación de manera vertical. En la misma forma cada estructura debe estar agrupada de manera departamental para que estas dos primeras condiciones puedan cumplirse y desarrollarse de manera adecuada

en la figura 5, observamos algunos tipos de agrupamiento comúnmente empleados.

Figura 6.Modelos de agrupamiento departamental normalmente empleados. (Daft, 2011)
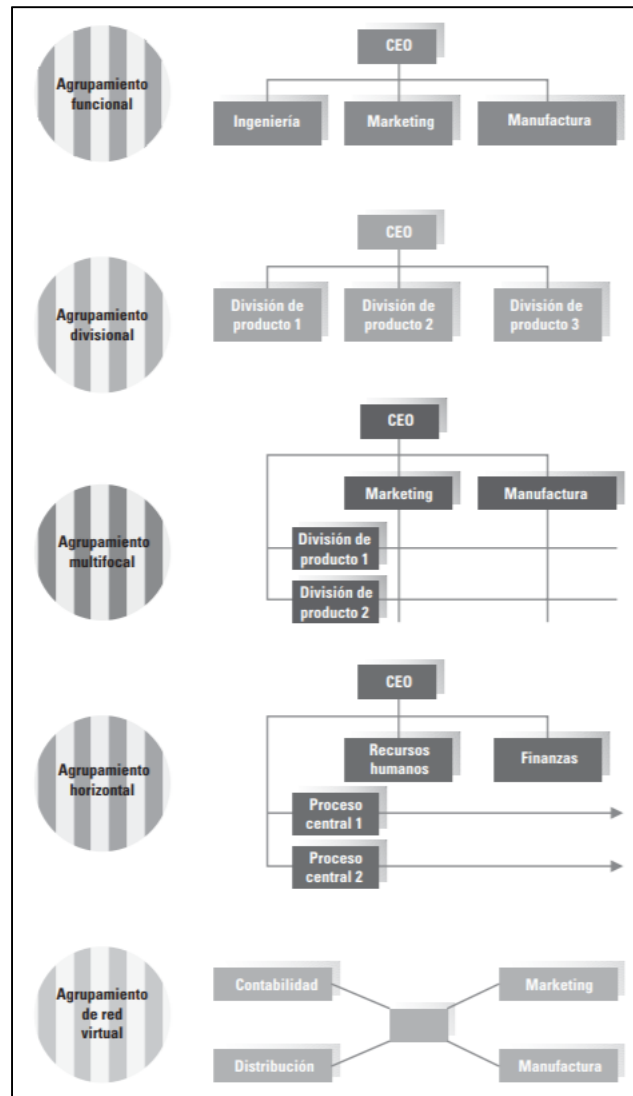
A partir de estos agrupamientos podemos desencadenar algunos tipos de estructuras comúnmente empleados por las compañías como lo son las estructuras funcional, divisional y geográfica. Cada diseño se basa en la forma

como son distribuidas las funciones y actividades dentro de la organización. En el caso de la estructura funcional todas las actividades se organizan por función y se organizan desde el nivel inferior hasta el nivel superior de la compañía. Esta estructura es eficiente siempre y cuando exista un mayor control vertical y la coordinación horizontal requerida sea mínima.

Figura 7.Fortalezas y debilidades de una estructura organizacional funcional. (Daft, 2011)

Fortalezas	Debilidades
1. Permite las economías de escala dentro de los departamentos funcionales	1. Lentitud en el tiempo de respuesta a los cambios en el entorno
2. Posibilita el desarrollo de habilidades y conocimientos profundos	2. Puede provocar que las decisiones se acumulen en el nivel alto; sobrecarga de la jerarquía
3. Habilita a la organización para que alcance las metas funcionales	3. Conduce a una coordinación horizontal deficiente entre departamentos
4. Es mejor con uno o algunos productos	4. El resultado es una menor innovación
	5. Implica una perspectiva limitada de las metas organizacionales

En cuanto a la estructura divisional o de producto, en este tipo de diseño estructural las organizaciones se agrupan u organizan según los productos individuales, servicios, grupos de productos, proyectos y/o programas, etc. Este tipo de organizaciones se basan en resultados organizacionales, este tipo de estructura fomenta la flexibilidad y el cambio.

Figura 8.Fortalezas y debilidades de una estructura organizacional divisional. (Daft, 2011)

Figura 9.Ejemplos de estructuras organizacionales. (Daft, 2011)
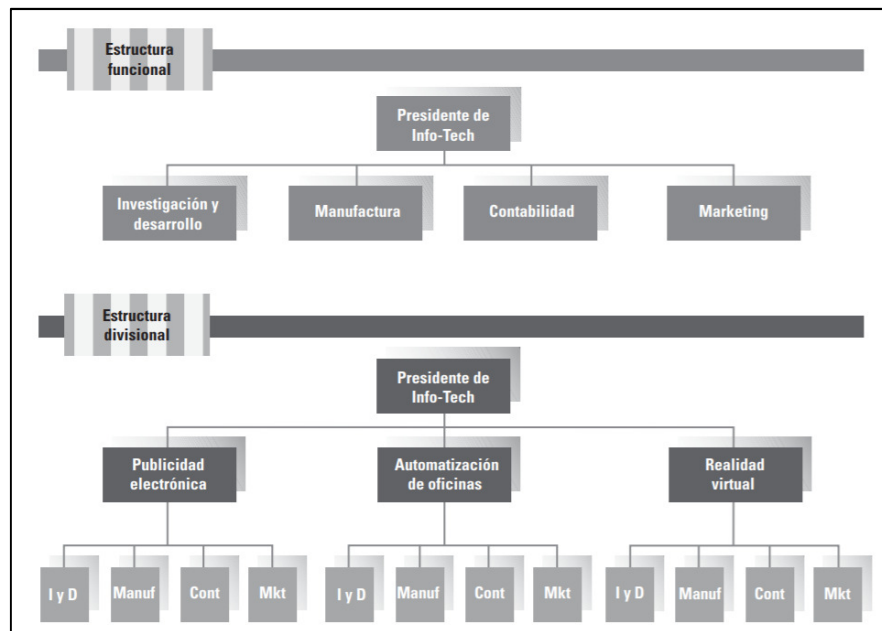
En la figura 8, se pueden observar las principales diferencias en cómo se distribuyen los organigramas de la organización, en la que una estructura funcional se rediseña en grupos de producto separados y cada grupo

cuenta con los departamentos funcionales requeridos por la compañía. De esta forma se puede maximizar la coordinación entre los departamentos funcionales dentro de cada grupo de productos.

En cuanto a la estructura geográfica podemos afirmar que la base de esta estructura son los interesados de la organización, en este orden de ideas cada región donde la compañía funciona puede tener diferentes necesidades, sin embargo, debe incluir las funciones mínimas requeridas para operar según los estándares y estrategia de la organización, en la figura 9 podemos observar un ejemplo de distribución geográfica.

Figura 10. Estructura geográfica organizacional. (Daft, 2011)
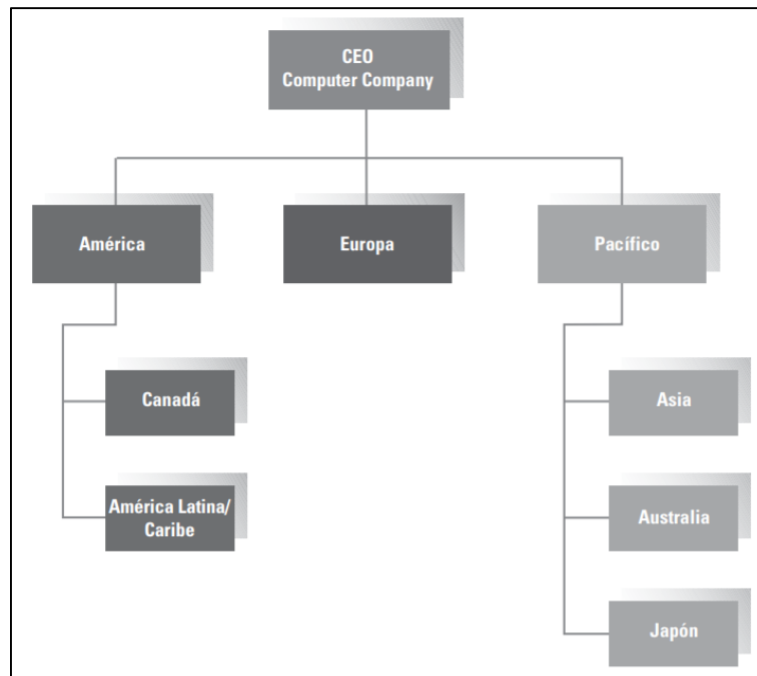
En algunas circunstancias algunas organizaciones requieren enfocarse tanto en el producto, función y la geografía, en estos casos lo más recomendable es una estructura matricial. Esta estructura es la respuesta cuando las organizaciones consideran que no funciona

la combinación de las estructuras funcionales, divisionales, y geográficas con los mecanismos de vinculación horizontal, esta estructura es similar al uso de integradores de tiempo completo usados en los otros tipos de estructura. Excepto que en este caso los gerentes de producto son tratados en igualdad de condiciones que los gerentes funcionales.

En cuanto a la implementación de estrategias de marketing según (Ahmed & Rafiq, 1995) el campo de la estrategia de marketing se divide en dos categorías como lo son: formulación de la estrategia y la implementación de la estrategia, igualmente en este artículo se dice que la importancia de una buena estrategia no es hacer bien las cosas, sino de hacer lo correcto y formular la estrategia correcta. Sin embargo, el tener una estrategia que se amolde a las necesidades de una empresa, pero no saberla ejecutar no va a generar una ventaja razonable en el mercado. Este problema de la implementación se ha viralizado y ha sido una constante en muchas empresas las cuales no logran llevar a cabalidad estrategias que en otras compañías han funcionado correctamente.

Actualmente se ha manejado el concepto de marketing interno, según lo exponen (Ahmed & Rafiq, 1995) este modelo de marketing impulsa la calidad en los sectores de servicios mediante el examen y control del mecanismo de prestación de servicios. Se cree que la idea basa su argumento en que una prestación efectiva del servicio requiere empleados motivados y conscientes del cliente, el vínculo entre la satisfacción del cliente y la del empleado se podría decir maneja una relación proporcional, Además, de considerarse que los empleados son clientes internos de la compañía para la cual laboran. Por tal motivo se define el marketing interno como ver a los empleados como clientes internos, ver los trabajos como productos internos que satisfacen las necesidades y deseos de cada cliente interno al tiempo que cumplen con los objetivos de la empresa.

De igual manera se considera que el primer mercado al cual debe apuntar toda compañía son sus empleados, y con esto apuntarles a actividades normalmente desarrolladas como función del personal y de esta forma ajustar los productos de trabajo a las necesidades humanas del personal. Esta misma estrategia de marketing ha sido ajustada con el paso del tiempo y se ha adaptado a un modelo multinivel de marketing interno, el cual incorpora un esquema donde expone como las herramientas y técnicas de marketing pueden ser empleadas. Según (Ahmed & Rafiq, 1995) el modelo implementa seis elementos para constituir una combinación de marketing interno, investigación y segmentación de las partes claves del modelo y sus etapas. Se caracteriza por tres niveles estratégicos (dirección, camino y acción), observemos la figura 11.

Figura 11.Modelo multinivel de marketing interno. (Ahmed & Rafiq, 1995)
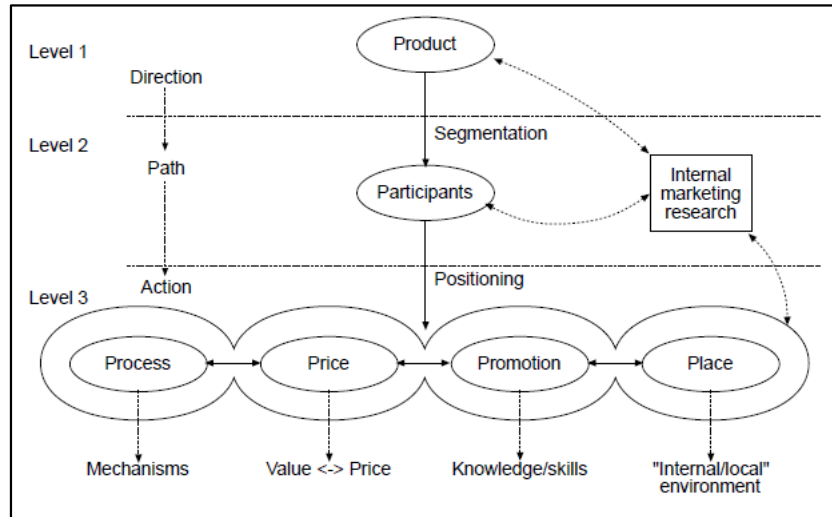
El primer nivel se encarga de establecer el programa de cambio, este nivel define como deben enfocarse los esfuerzos de la organización mediante una evaluación de oportunidades externas y un análisis de las capacidades de la organización. El segundo nivel es el nivel de la ruta o camino, a partir de las posibilidades

y/o alternativas que tiene la organización para lograr el objetivo del cambio o la misión establecida por la organización. El nivel final es la acción, esto requiere que la compañía tenga claramente definidos cursos de acción y actividades a desarrollar. Se requieren de acciones totalmente detalladas para que la implementación sea lo más clara posible y sin problemas, el accionar de este nivel depende en un 100% de los resultados obtenidos en el segundo nivel del modelo, que a su vez están regidos por el primer nivel.

5.2. ESTADO DEL ARTE

Actualmente la gestión y manejo de proyectos en las industrias se ha convertido en un común denominador debido a que la economía moderna cada vez se encuentra más proyectificada y muchas más compañías de los diferentes sectores se basan en proyectos, programas y portafolios como una primera opción para desarrollar nuevos productos y servicios, así como sus principales procesos de negocio, actualmente se tienen indicios de que alrededor de un 40% de la economía a nivel global es basada en proyectos, teniendo como su principal estrategia o proceso la gerencia de proyectos para producir servicios y/o productos, esta corriente inicio cercana a la década de los años 30 y fue tomando fuerza hasta convertirse en una de las principales alternativas para el diseño de organización en los 90, y expandirse en todas las industrias por su grandes resultados al asociarla con diferentes características y contingencias.

Esta corriente ha llevado a las compañías al punto de compararse con similares y compañías de otros mercados, con el ánimo de poder conocer como sus procesos en comparación con los procesos empleados por la competencia se encuentran en ventaja y/o desventaja y de esta manera obtener tener la mejor

estructura que esté acorde con las estrategias de las mismas para gestionas proyectos.

Sin embargo, el llevar una organización a una estructura basada en proyectos no debe ser un cambio manejado tan ligeramente. Según (Maxim, Mauro, & Rodney, 2017) se ha identificado que las organizaciones basadas en proyectos llevan más de 25 años de ser reconocidas y que algunos de los primeros intentos de adoptar una organización basada en proyectos no tuvieron éxito, esto debido a que algunas de las organizaciones cambiaban completamente de una administración de línea jerárquica funcional (conocida como administración clásica) a un enfoque totalmente enfocado en el proyecto. Al eliminar la jerarquía funcional, estas organizaciones habían perdido las fortalezas de la jerarquía funcional obtenida por la organización y no pensaron en como reemplazar estas fortalezas con el trabajo centrado en proyectos. Por lo que determinan que es mejor para la organización retener la jerarquía funcional y encontrar formas para que dicha jerarquía pueda trabajar de la mano con estructuras de proyectos.

Figura 12. Modificación del star model (después de Galbraith, 2014). (Maxim, Mauro, & Rodney, 2017)
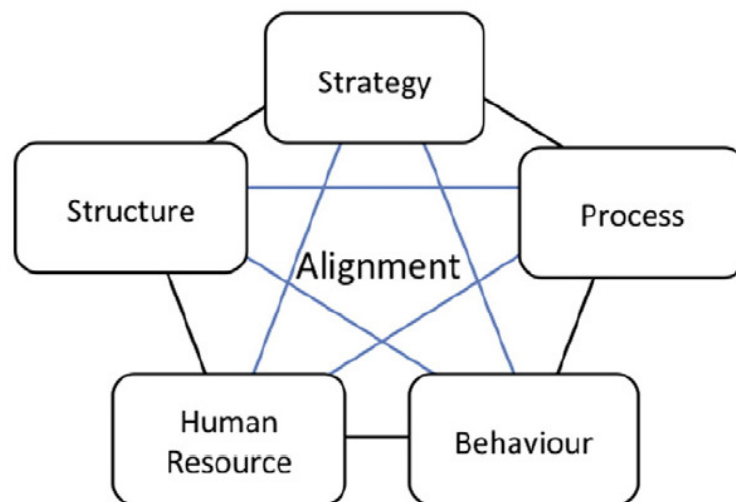
Algunos estudios actuales se han centrado en el conocido Star Model, este marco consiste en un conjunto de políticas de diseño que son controladas por la gerencia y que influyen en el comportamiento de los empleados, estas políticas son las herramientas de las cuales la gerencia se escuda para moldear las decisiones y los comportamientos de sus organizaciones de una manera efectiva, sin embargo este mismo método ha recibido varias modificaciones tal como lo indican (Maxim, Mauro, & Rodney, 2017) normalmente el modelo estrella de Galbraith comprende estrategia, estructura, procesos, recompensas y personas. En la figura 12, observamos que este modelo consta de 5 elementos en los nodos de un pentágono, con la palabra alineación en el centro de la estrella, enfatizando que los cinco elementos deben ser consistentes entre sí y con la estrategia organizacional. Galbraith ha variado la definición de los cinco nodos con inicio superior y sentido horario de la siguiente manera: estrategia, proceso, comportamiento, recursos humanos, y estructura. Este modelo es normalmente elegido cuando se piensa que los proyectos pueden ser vistos como sistemas para procesar información, estos mismos cinco nodos pueden ser empleados para categorizar muchas de las más recientes investigaciones sobre organizaciones basadas en proyectos.

Según (Maxim, Mauro, & Rodney, 2017) Galbraith identifico cinco dimensiones en su Star Model, y los llamo estrategia, estructura, procesos, personas y recompensas como los elementos clave. Un modelo alternativo 7S planteo la estructura, estrategia, sistemas, estilo, habilidades, personal y objetivos subordinados como los elementos clave del diseño organizacional y enfatizó la importancia de los componentes suaves. Si miramos la organización como un sistema abierto para procesar información los investigadores han desarrollado un modelo de congruencia que comprende arreglos organizativos formales, organización informal, tareas y componentes individuales impulsados por la estrategia. Otros agrupan las decisiones de diseño, bajo el diseño de posiciones (especialización laboral, formalización del

comportamiento, entrenamiento y adoctrinamiento), diseño de superestructura (agrupamiento de unidades y tamaño), diseño de enlaces laterales (sistemas de planificación y control, y dispositivos de enlace), y el diseño del sistema de toma de decisiones (descentralización vertical y horizontal).

Aunque todos los modelos Holísticos presentan difieren según el enfoque bajo el cual se diseñe la organización y su representación, estos apuntan a lograr el mismo propósito y tienen más similitudes que diferencias. Pues comparten opinión sobre la coherencia interna de los arreglos y su alineación externa con el medio ambiente. En segundo lugar, existe una superposición significativa entre las dimensiones identificadas, como se observa en el Star Model las personas se parecen a las habilidades y el personal, el individuo, al diseño de las posiciones en el modelo 7S. Finalmente, todos los modelos tienen como objetivo introducir una herramienta de análisis organizacional, igualmente aplicable a una amplia gama de organizaciones.

6. METODOLOGIA

Figura 13. Metodología de la investigación.
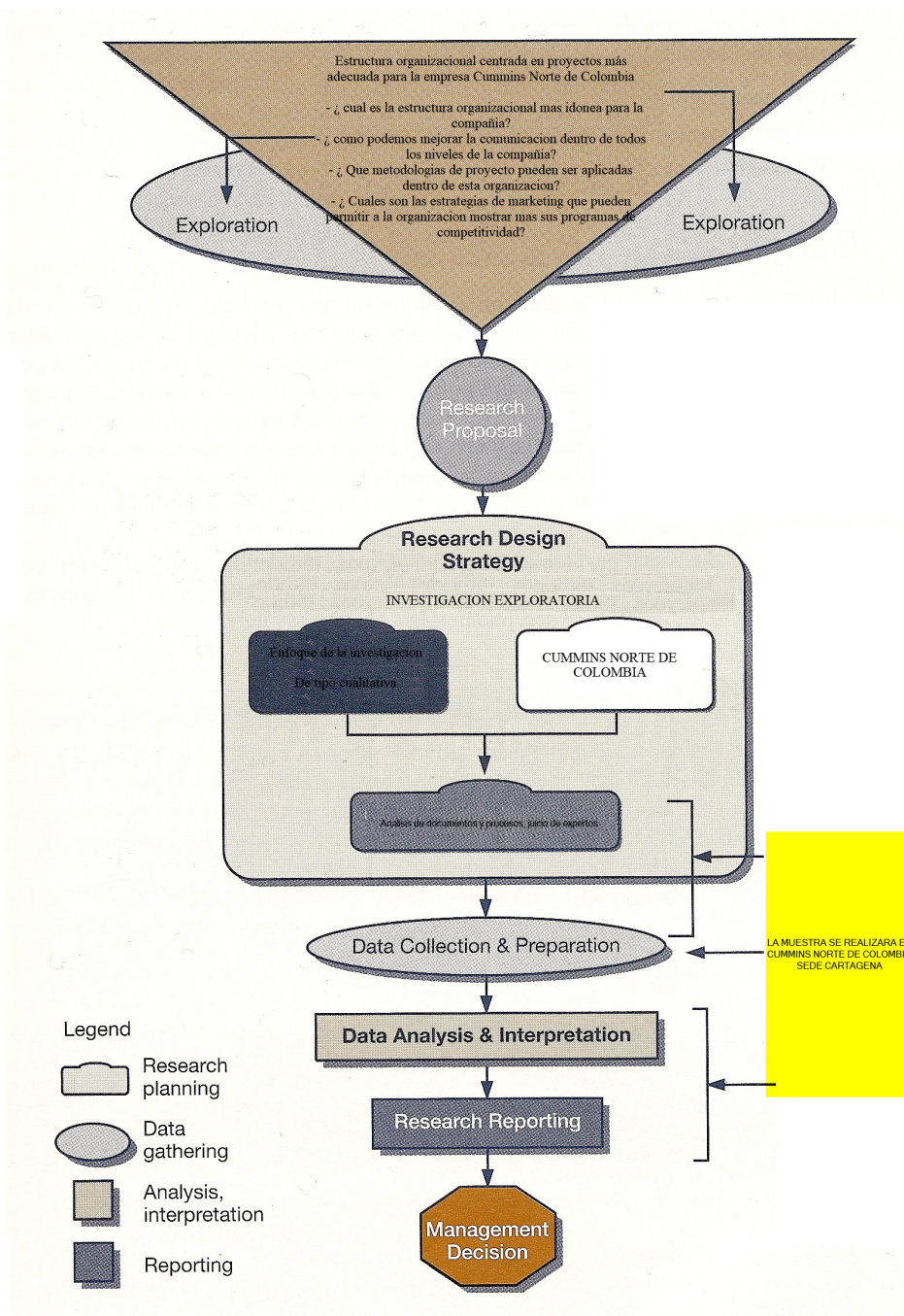
6.2. ALCANCE DE LA INVESTIGACION

Esta investigación será desarrollada de tipo exploratorio, teniendo en cuenta que se pretende identificar y describir el estado actual de la estructura organizacional de la compañía Cummins Norte de Colombia, y finalmente generar un entregable producto de la investigación desarrollada que se encuentre asociado al objetivo general de la investigación.

Esta metodología consiste en una revisión de la literatura disponible acerca del diseño o reestructuración de las estructuras organizacionales y sus diferentes comportamientos, que permitan entender e interpretar como están deben estar alineadas con las estrategias de las organizaciones y el mercado en el cual se mueven, además de las estrategias de marketing empleadas por las organizaciones para potencializar sus productos o servicios. Dentro de esta investigación algunas de las posibles limitaciones será el acceso a información de tipo confidencial que maneje la compañía, el cual puede afectar el nivel de criterio a tener en cuenta en algunos puntos de la investigación, en este orden de ideas el uso de información secundaria en la cual se expongan casos de estudio con respecto al diseño de estructuras organizacionales será totalmente necesario para soportar el estudio. De igual forma, el uso de datos secundarios en esta investigación puede no ser preciso y dificultar al investigador que desarrolle un análisis eficiente.

6.3. DISEÑO DE LA INVESTIGACION

El proyecto será desarrollado en tres etapas las cuales estarán alineadas con los objetivos específicos de esta investigación.

- **Etapa 1-Identificacion de la estructura y estado actual de la compañía**

  Tipo de diseño: Bibliográfico. Obtención de la información a través de la revisión de los procesos y facilitadores de la organización.

  Fuentes: sistemas de información de la compañía, documentos de la gestión organizacional.

  Técnicas y herramientas: Análisis de documentos y procesos.

- **Etapa 2-Caracterizacion de las estructuras organizacionales y selección de la misma.**

  Tipo de diseño: Bibliográfico. Obtención de la información a través de la revisión del marco teorico y el estado del arte.

  Fuentes: Journals de alto impacto, papers y revistas de investigación, libros de autores reconocidos, fundamentación teórica, producto de etapas anteriores.

  Técnicas y herramientas: Análisis de documentos y procesos, juicio de expertos.

- **Etapa 3-Selección de metodologías y estrategias para el manejo de proyectos, marketing y comunicaciones.**

Tipo de diseño: Bibliográfico. Obtención de la información a través de la revisión del marco teórico y el estado del arte.

Fuentes: Journals de alto impacto, papers y revistas de investigación, libros de autores reconocidos, fundamentación teórica, producto de etapas anteriores.

Técnicas y herramientas: Análisis de documentos y procesos, juicio de expertos.

6.3. MUESTRA

la investigación se desarrolla sobre la compañía Cummins Norte de Colombia, más específicamente en la región de Cartagena. Actualmente esta compañía se encuentra dividida en tres dependencias como lo son Minería, Barranquilla, Cartagena, siendo Cartagena el área más joven dentro de la empresa y con mayor proyección de crecimiento.

7. DIAGNOSTICO

El diagnostico se centra en la compañía Cummins Norte de Colombia, esta compañía basa su modelo de negocio en el sistema operativo de Cummins COS (por sus siglas en ingles), el cual es la base para llevar a cabo mejoras en nuestros procesos y servicios, optimizando el tiempo invertido en ellos. Mediante el COS Cummins les permite a sus empleados identificar problemas de manera anticipada, pues el principio fundamental del COS son los procesos, como se ejecutan los trabajos, y como estos conducen a los resultados esperados. El corazón del COS son sus 10 practicas las cuales pueden aplicarse a toda la organización, independientemente del negocio o la función (ver figura 1).

De acuerdo con la revisión literaria realizada y según (M. & S., 2015) cada día más organizaciones son manejadas como estructuras centradas en proyectos o matriciales fuertes. Y una estructura centrada en proyectos tiene una correlación directa con la ubicación de la PMO en la jerarquía organizacional y el porcentaje de proyectos bajo su mandato, Según los investigadores las PMO deben ser ubicadas en altos niveles jerárquicos y deben mandar en un alto porcentaje de proyectos ver figura 14.

Figura 14. entornos de una organización. (M. & S., 2015)
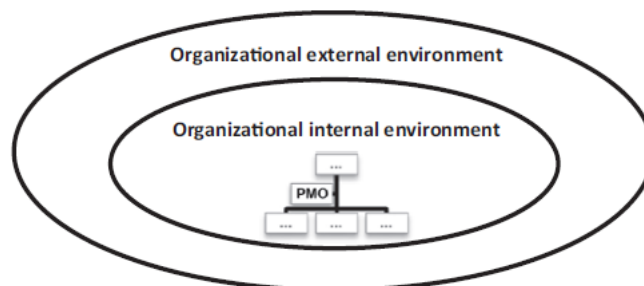
Con esto se logra que las líneas de reporte sean más cercanas a la dirección general de la organización y se logren

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informes y reportes más completos acerca de los proyectos de la organización, en el caso de Cummins Norte de Colombia sede Cartagena como primera medida se observa la ausencia o definición clara de una estructura organizacional (ver figura 14), teniendo al marketing y las comunicaciones ocupando una posición mucho más cercana con la dirección general lo cual deja ver el enfoque en el cual se ha manejado la compañía como lo es el entorno externo al a organización (figura 13).

Figura 15. Estructura organizacional de Cummins Norte de Colombia (Cummins Norte de Colombia).

Según (Donk & Molloy, 2008) algunas organizaciones optan por una estructura simple de proyectos en donde la potencia y la presión externa son grandes, toda organización que pretenda controlar los proyectos desde el gobierno mediante soluciones innovadoras siempre tiende a estructuras simples y centralizadas, o estructuras burocráticas donde la formalización es el estándar. En el caso de Cummins Norte de Colombia el entorno externo es una variable que afecta directamente la estructura y funciones de la compañía lo cual ha obligado a dividir la compañía por unidades de negocio según los mercados que se manejan en la zona norte colombiana, de igual forma Donk & Molloy proponen una estructura simple al a cual tienden este tipo de organizaciones (ver figura 16), en ella se pueden apreciar la jerarquización de la estructura y los procesos que normalmente se manejan en la compañía.

Figura 16. Estructura simple de proyecto. (Donk & Molloy, 2008)
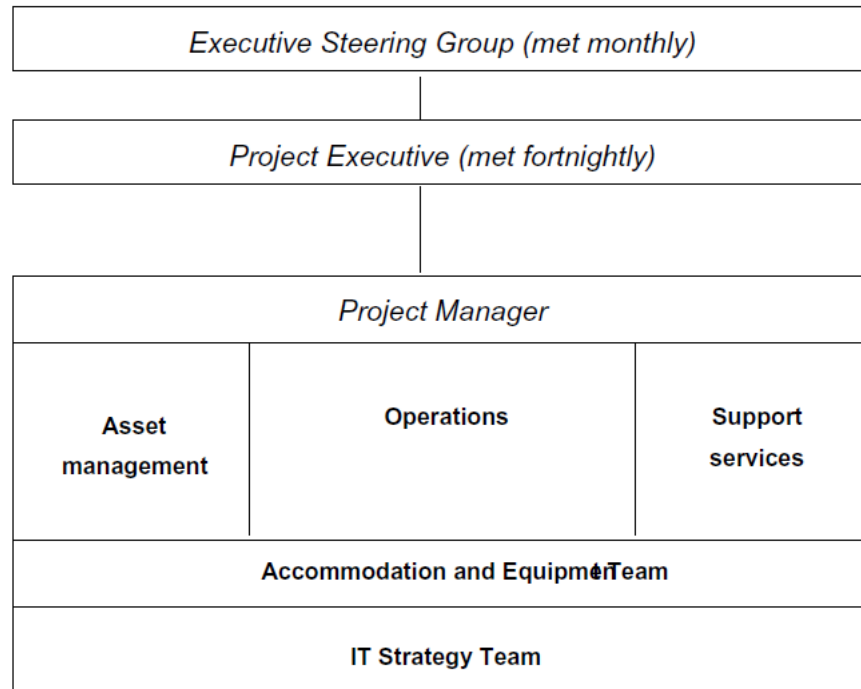
Actualmente la compañía se encuentra dividida en nueve procesos como lo son Gerencia Barranquilla, Gerencia Minería, Gerencia Cartagena, Servicio y Soporte técnico, Financiera, Recursos humanos, IT, logística y HSEQ. A su vez categoriza estos nueve procesos de las siguientes formas: procesos gerenciales, procesos operativos y procesos de soporte como (ver figura 16), y asigna las responsabilidades a cada proceso acorde a la unidad de negocio o áreas de procesos.

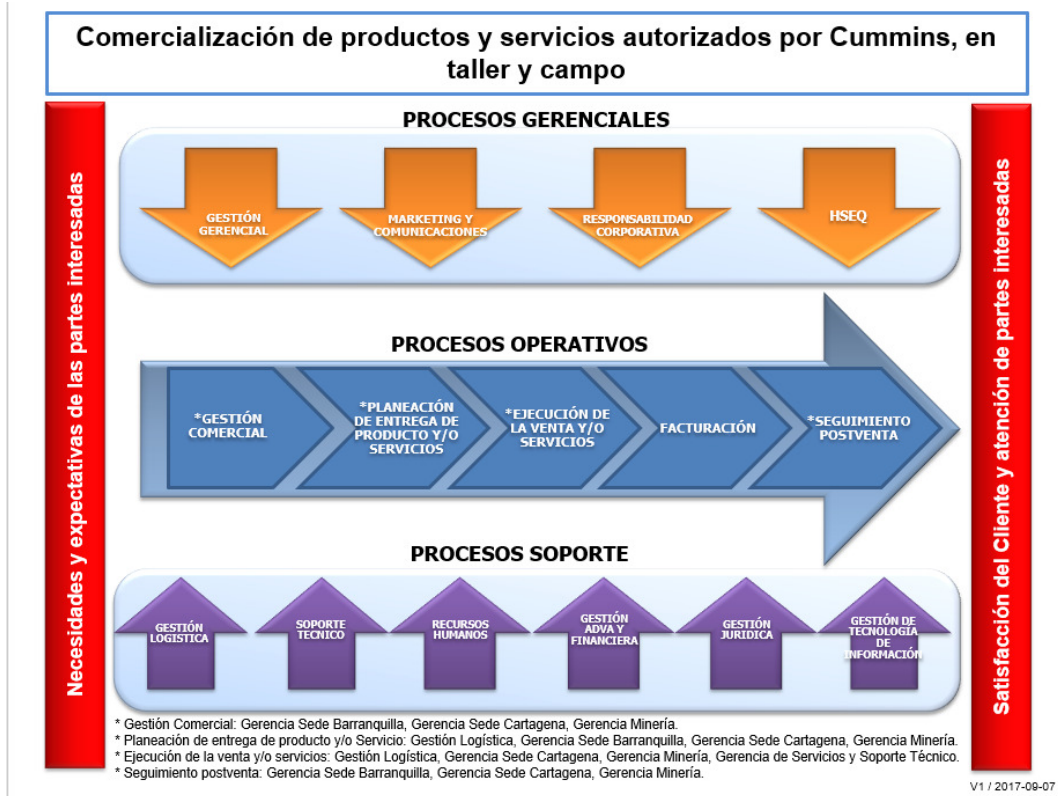Figura 17. Procesos de Cummins Norte de Colombia.(Cummins Norte de Colombia)

Figura 18. Responsabilidades de los procesos de Cummins Norte de Colombia. (Cummins Norte de Colombia)

Se logra identificar que algunos de los procesos operativos como lo son: gestión comercial, planeación de entrega de productos y/o servicios, ejecución de la venta y/o servicio, y el seguimiento de postventa, dependen totalmente de la gerencia de cada una de las sedes de la compañía como lo son Barranquilla, Cartagena o Minería, con lo cual se puede observar que existe autonomía e independencia entre cada una de las unidades en algunos procesos. Partiendo de esto podemos identificar que el manejo de algunos procesos puede tener ligeras desviaciones acorde al mercado de cada región y según los intereses de cada una de las sedes, con lo cual la alineación al modelo operativo de Cummins puede verse afectada en algunas situaciones, pues la sincronía en los flujos de información, material y físicos, al no ser la misma en todas las líneas y direcciones del negocio afectaría el diseño de calidad en la estrategia y a su vez la excelencia funcional de la compañía. Esta autonomía asignada a cada gerencia de sede ha causado que el crecimiento de la compañía este sectorizado y no se de manera uniforme en todo el negocio.

De igual forma dentro de la revisión realizada a la estructura organizacional se hace evidente la ausencia de una PMO que tome el control de los proyectos y se encargue de gestionarlos de manera adecuada, esto aumenta el riesgo de que cada área gestione los proyectos según su interés sin tener en cuenta como pueden afectar algunas decisiones a otras áreas de la compañía. En el caso puntual de la sede Cartagena se logra identificar el manejo de proyecto mediante la figura administrador de proyectos sin embargo este no funciona como un instrumento de vinculación horizontal entre departamentos o integrador de tiempo completo, Según (Daft, 2011) los equipos de proyecto suelen ser el mecanismo de vinculación horizontal más fuerte, y con frecuencia se utilizan en conjunto con un integrador de tiempo completo. Igualmente, cuando estas actividades entre departamentos requieren de una actividad solida por periodos de tiempos más prolongados, la solución propuesta es un equipo transfuncional totalmente definido (ver figura 4). En el caso de la compañía Cummins Norte de Colombia estos equipos de trabajo transfuncional no se encuentran claramente definidos con lo cual el manejo de algunas situaciones dentro de los proyectos como decisiones

financieras y logísticas se encuentran en constante amenaza de sufrir contratiempos. En cuanto a la cadena de mando la cual no logra ser identificada en la figura 15, genera una evidente confusión para algunos de los funcionarios quienes al no identificar está dentro del organigrama, sienten que en situaciones esa línea de mando ininterrumpida que los vincula y muestra a quien se le reporta no existe.

Figura 19. Equipos utilizados para la coordinación horizontal en wizard software company. (Daft, 2011)
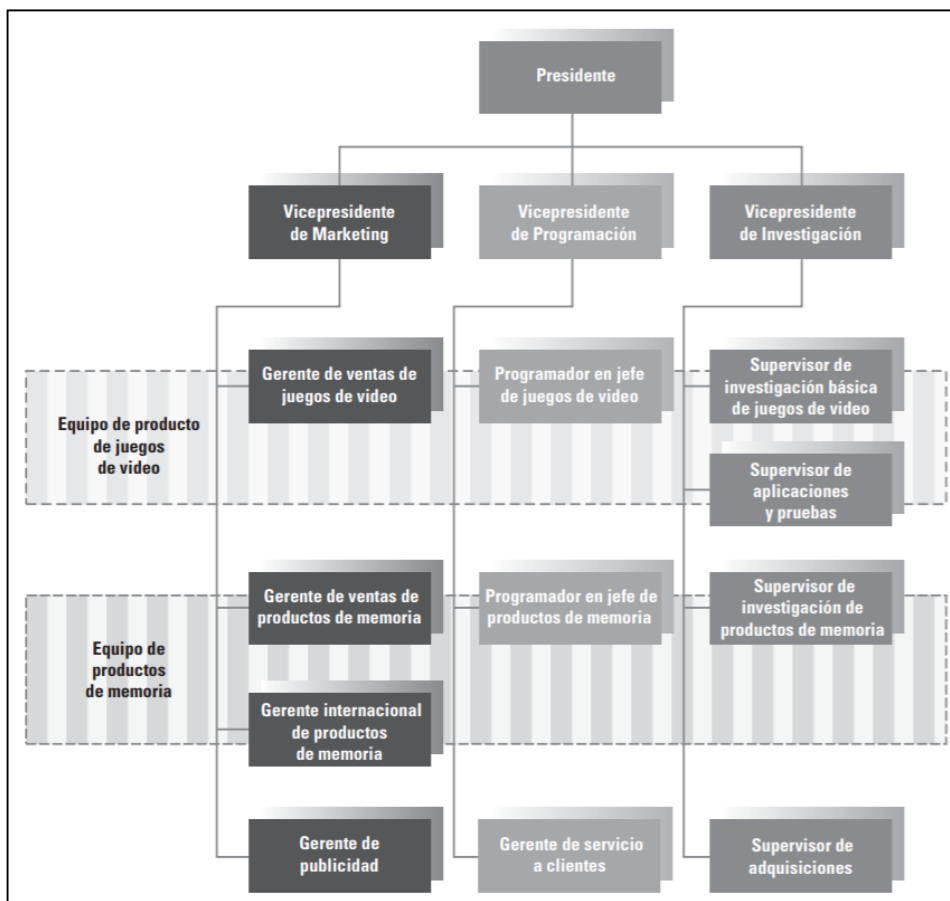
En la figura 19 podemos observar un ejemplo de la compañía Wizard, en la cual emplean equipos transfuncionales para coordinar cada línea de producto mediante los departamentos de investigación. Programación y marketing. Esta misma metodología ha sido empleada con total éxito por empresas

como Health Mastery y el grupo de productos médicos de Hewlett-Packard, con la particularidad de conformar equipos con miembros de otros países.

En cuanto a la conformación de equipos virtuales, la compañía maneja este tipo de equipos caso particular es el equipo de IT y RRHH. En el caso del equipo de IT este se encuentra conformado principalmente por miembros de Mexico y toda la región del centro y sur América, así como la división Servicedesk la cual opera desde Polonia e incluye a miembros de todas las regiones donde se encuentren ubicados distribuidores de Cummins. Este equipo incorpora atención 24/7 y soluciones en tiempos de acuerdo con el carácter del requerimiento. Usualmente este equipo se encuentra realizando validaciones y auditorias dentro de cada equipo de trabajo y/o división con el fin de recibir comentarios y entregar soluciones a estos, que a su vez deben transmitir la respuesta al resto de sus compañeros de forma que no se vea afectada la operación. Sin embargo, se ha identificado un claro problema de comunicación el cual resulto en la mala elección y parametrización del nuevo sistema de información de la compañía. Actualmente todos los clientes tanto internos como externos se encuentran afectados por las diferentes demoras y barreras generadas con la implementación del nuevo sistema ERP, en cuanto al modelo de negocios de la compañía este nuevo sistema de información se encuentra totalmente distante a lo que se propone en cada una de sus etapas con lo cual no se genera excelencia funcional. Dando como resultado un ambiente de trabajo tenso y evitando el crecimiento rentable de la unidad de negocio.

La implementación de este sistema llega como directriz corporativa, en el afán de llevar nuestra cultura organizacional a un punto más cercano a lo que la marca representa a nivel mundial. Dentro del estudio realizado por la compañía, se toma un distribuidor de Costa Rica el cual aparenta tener un mercado similar al nuestro y emplean una plantilla del software diseñada para este distribuidor en nuestra unidad de distribución. Claramente los mercados y las exigencias de estos son totalmente diferentes con lo cual el software luego de diez meses de operación aun no

estabiliza 100% en todas sus funciones, estas son algunas de las quejas más comunes en los distintos equipos de trabajo:

- Inconformidad de parte de clientes tanto internos como externos, por los retrasos e inconvenientes generados.

- No se logra total seguimiento a las solicitudes y órdenes donde intervienen los diferentes procesos de apoyo caso puntual finanzas y el área de servicios.

- Actualmente el software presenta brechas con lo cual no se logra utilizar de manera estable y adecuada durante toda una jornada laboral (múltiples errores en su operación).

- No se está logrando la excelencia funcional pues los procesos se han incrementado en cuanto a tiempo de ejecución en un 70%, con lo cual se ha generado la necesidad de horas extras reduciendo la rentabilidad del negocio.

Todas estas inconformidades han generado principalmente retrasos en el equipo de servicios, quienes han sido el área con mayores cambios operacionales debido a la implementación del nuevo sistema operativo, el aumento del tiempo administrativo requerido en la gestión de los proyectos y actividades diarias ha dificultado en gran medida algunos tiempos de respuesta y el cierre de proyectos como lo son los proyectos en marcha con Terminal de contenedores, Soc. Portuaria de Cartagena, Soc. portuaria puerto bahía y Transcaribe.

En cuanto al equipo de recursos humanos, este funciona con sede principal en Brasil para la región de centro y sur América, adicionando miembros en cada distribuidor de la

región que se alinean con la estrategia general de la compañía. Este equipo tiene como principales fortalezas el lograr totales cambios culturales como las políticas de trato a otros, el haber alcanzado importantes logros como lo fueron el Insourcing Project en el RDC, Implementación del sistema de gestión del talento para personal Técnico en Colombia con el cual cada técnico puede registrar sus objetivos anuales y controlarlos con su líder a lo largo de todo el año, siendo país pionero de la región. Lanzamiento del Plan de Carrera para personal técnico en el cual el personal puede proyectar su crecimiento dentro de la compañía y establecer sus propias metas dentro de la organización, programa de reconocimiento WOW, y el establecimiento de un canal de comunicación confiable entre empleados y la organización. En cuanto a las estrategias de marketing la unidad no cuenta actualmente con un plan marketing que le permita ganar mercado entre los usuarios y clientes de la marca, es deficiente el resultado de las metas propuestas actualmente para la captación de clientes y no se hace visible de manera adecuada la marca. El plan o estrategia actual de la compañía se basa 100% en el portal web Circuit de la compañía, los clientes actuales de la marca desconocen los planes de competitividad y descuentos ofertados para las diferentes aplicaciones por lo cual hay una clara oportunidad de crecimiento si se logra de la manera adecuada la captación de personal por medio de las estrategias adecuadas. En la gráfica 19 podemos observar cómo fue la distribución en ventas por segmento de la compañía en el año 2018 en la cual se observan que segmentos como servicios, motores y partes aportan aproximadamente un 94,75 % de las ventas y segmentos como el de Power gen y filtros los cuales aportaron únicamente 5,25% de la participación en ventas, lo cual deja como meta cercana estos segmentos por explotar y desarrollar al nivel de los otros.

De igual forma en la gráfica 20 podemos observar cómo se distribuyó la participación por mercado, en la cual Minería fue el área con mayor aporte como principal negocio desarrollado por la compañía, seguido del sector industrial, automotriz y marino como los principales aportantes a las ventas. A partir de esto podemos afirmar que mercados como el marino y el automotriz por la posición geográfica en donde se encuentra ubicada la compañía, son segmentos los cuales

deberían tener mayor participación y captación de clientes. se estima que la región norte de Colombia tiene más de 1000 motores Cummins en operación, los cuales aún no son 100% atendidos por el distribuidor en los diferentes mercados.

Figura 20. Distribución por segmentos Cummins Norte de Colombia 2018.
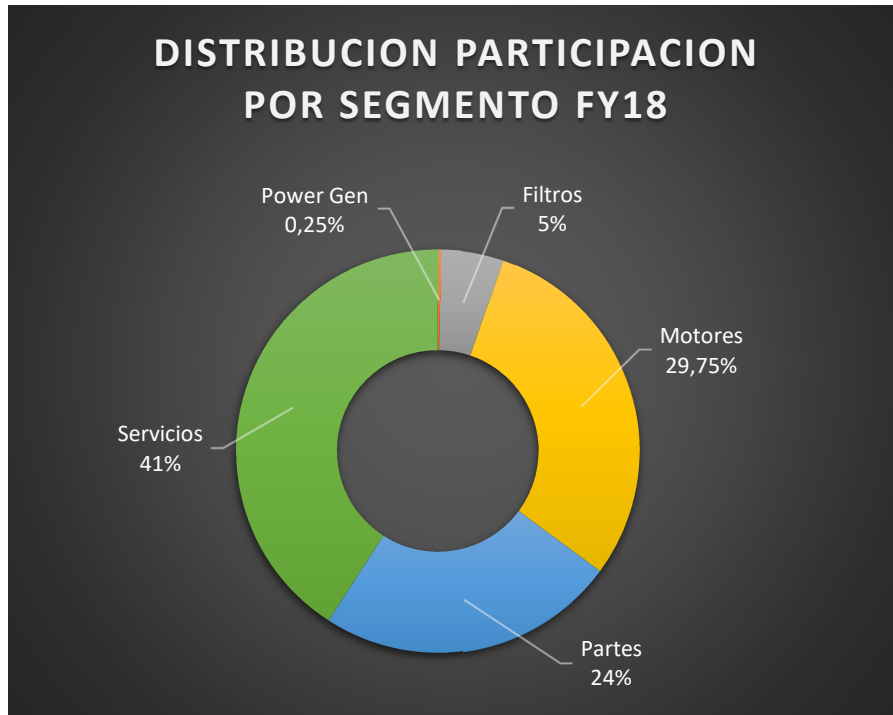
A partir de estas distribuciones por segmentos y mercados podemos identificar cuáles son los puntos en los cuales se debe realizar mayor impulso y marketing en aras de impulsar estos mercados y potencializarlos teniendo en cuenta la región sobre la cual tiene la mayor influencia la compañía. En cuanto a la participación en el total de ventas la sede Cartagena presento un crecimiento total con respecto al año 2017 siendo está dentro de la compañía la unidad con mayor crecimiento con un cumplimiento vs AOP del 103,6% y un % de participación en ventas promedio del 12% con respecto al total de la compañía en cada cuarto (ver figura 21).

Figura 21.Distribucion por mercados Cummins Norte de Colombia 2018.

DISTRIBUCION EN VENTAS POR MERCADO 2018

Marino 3,31%

Agricultura 0,25%

Oil & Gas 0,02%

Construccion 0,27%

Automotriz 4,33%

Industrial 16,75%

Mineria 75,07%
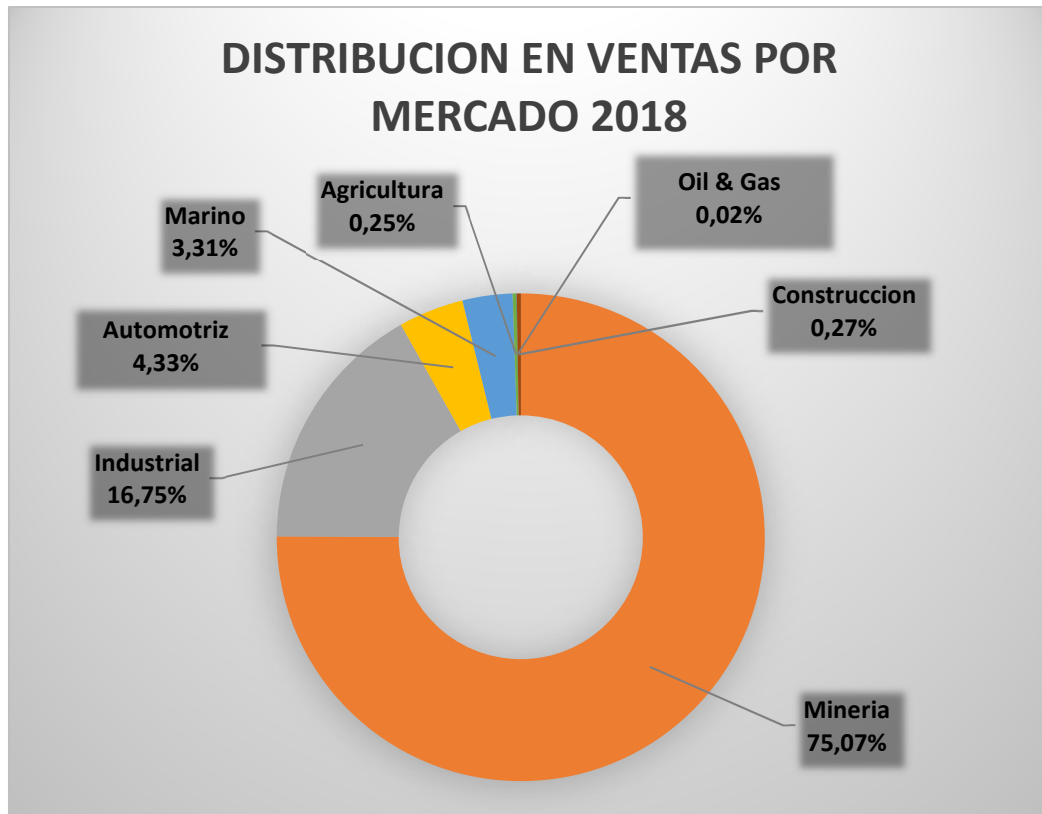
Figura 22. Participación en ventas 2018 unidad de Cartagena.
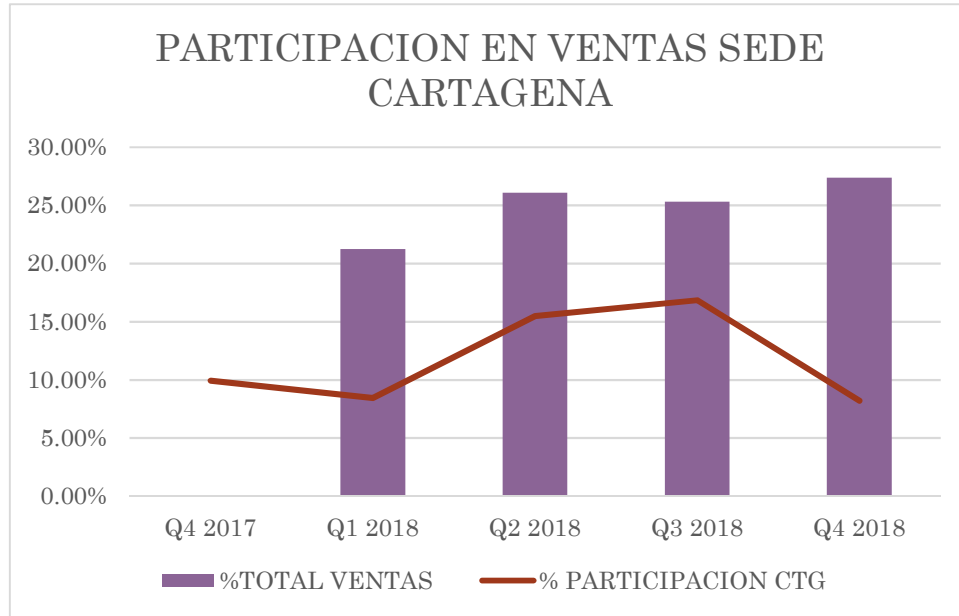
En resumen podemos asegurar que la compañía Cummins Norte de Colombia unidad de negocios Cartagena, al carecer de una estructura organizacional debidamente definida en todos los niveles tanto verticales como horizontales, presenta dificultad en la definición de roles y responsabilidades en cada uno de los procesos como por ejemplo el rol de administrador de proyectos debe ser ubicado como integrador de tiempo completo y este a su vez coordinar todo un equipo transfuncional, adicionalmente al estar dividida en tres unidades de negocio como lo son Minería, Barranquilla y Cartagena muchos de los procesos se encuentran centralizados para las unidades de Minería y Barranquilla dejando un poco en letargo algunos procesos los cuales se convierten en cuellos de botella para la sede de Cartagena. Caso puntual algunos de los procesos operativos que como observamos en la figura 17 dependen de cada uno de los gerentes de unidad, esto usualmente puede verse en contra de los intereses de cada unidad debido a que es común encontrar clientes en la región que pueden ser atendidos por diferentes unidades según sea la zona de influencia.

Figura 23.Principales hallazgos diagnostico Cummins Norte de Colombia.

RESUMEN HALLAZGOS	
1	Estructura organizacional no definida.
2	Ausencia de roles, responsabilidades y conformación de equipos de trabajo.
3	Parametrización del sistema de información de la compañía.
4	Implementación estrategias de marketing para explotar nuevos mercados.

8. RESULTADOS Y HALLAZGOS DE EVALUACIÓN

8.1. DEFINICIÓN DE ESTRUCTURA ORGANIZACIONAL

De acuerdo con el diagnóstico ejecutado sobre la compañía Cummins Norte de Colombia, y según las políticas corporativas y el modelo de negocio COS (ver figura 1), y el Quickserve playbook (ver anexos), se define la estructura organizacional de la figura 23, en la cual se observan los niveles jerárquicos o verticales definidos y demarcados según sea el proceso gerencial, operativo o de soporte. Esta estructura fue diseñada para mantener el equilibrio tanto vertical como horizontal dentro de la organización, la intención es permitir el desarrollo a nivel horizontal de manera que se logren crear equipos de trabajo y exista un alto grado de colaboración entre los departamentos funcionales. De acuerdo con las políticas de la compañía el gerente de la sede (ver anexos) debe ser capaz de crear equipos eficaces, con una identidad solida que apliquen habilidades y perspectivas diversas para alcanzar metas comunes. Sin embargo, este desarrollo horizontal no debe desconocer en ninguna circunstancia que la organización está controlada por medio de la jerarquía vertical en cuanto a las decisiones de nivel superior.

Figura 24.Propuesta estructura organizacional Cummins Norte de Colombia.
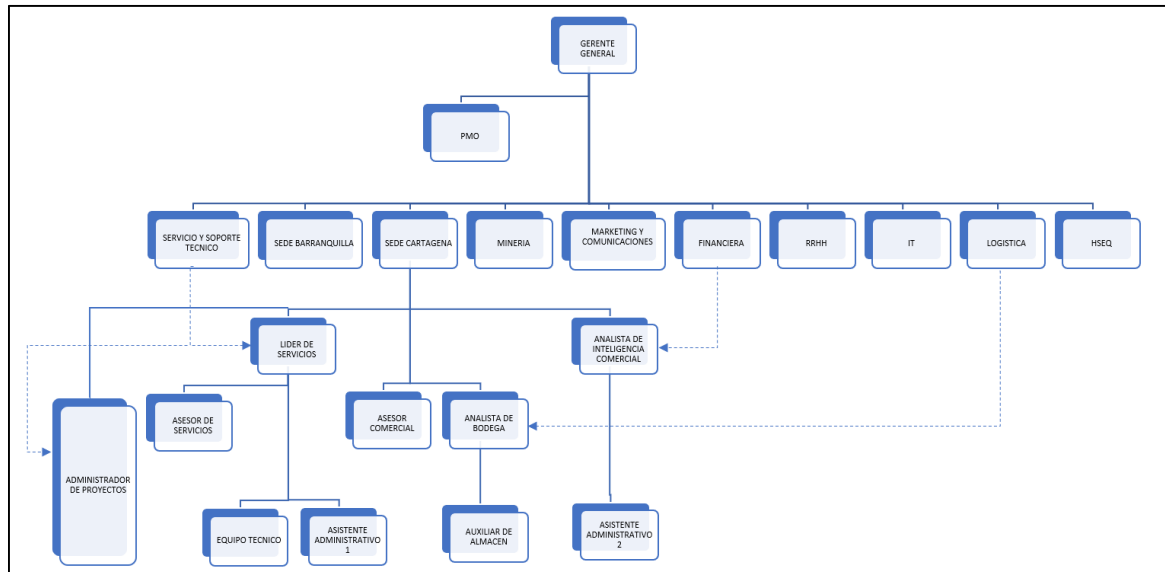
En cuanto a los cambios realizados con respecto a la estructura presentada en la figura 14, estos se basan en el agrupamiento horizontal, buscando que los empleados a nivel puedan trabajar en torno a procesos centralizados, integrales, que se permita un flujo de información y de material entre ellos de tal manera que el resultado final sea la entrega de valor real al cliente tal como lo indica el COS. De igual y siguiendo las recomendaciones emitidas por la compañía, el distribuidor de Cartagena es definido como un distribuidor grande por lo cual recomiendan la estructura organizacional para el área de servicios mostrada en la figura 24, sin embargo, la cultura y recursos de nuestro distribuidor actualmente no permiten la estructuración de esta forma; por lo cual la estructura definida es un poco más cercana a la de un distribuidor mediano ver figura 25. Con esta estructura se pretende cumplir con cada uno de los puntos del COS, pues el ordenamiento diseñado facilita la inclusión de cada uno de los departamentos funcionales a un proceso central en específico, generando inclusión de las personas y promoviendo el trabajo en equipo que en ultimas genera un ambiente adecuado en el sentido laboral. La inclusión de una PMO de apoyo obedece a la creciente

popularidad de las oficinas de gestión de proyectos como estructuras organizativas que se basan en el supuesto de que apoyan una gestión de proyectos más eficiente y eficaz para una mejor implementación de la estrategia. De esta forma y según (Singh, Keil, & Kasi, 2009) se pretende tener una PMO pues esta ayuda tanto al gerente de proyectos de IT como a la organización en lo relevante a entender y aplicar prácticas de gestión de proyectos, así como para adaptar e integrar los intereses comerciales y los esfuerzos en la gestión del proyecto. De igual forma (Singh, Keil, & Kasi, 2009) indican en su investigación que una PMO puede tener un personal mínimo y ningún control directo sobre la gestión de proyectos individuales. En esta configuración conocida como PMO-light, la PMO desempeña un papel de apoyo relativamente pasivo para los gerentes de proyecto al crear estándares para la implementación del proyecto y actuar como un repositorio de información para los proyectos.

Figura 25.Estructura organizacional para distribuidores grandes. (Quickserve Playbook, Cummins Inc.)
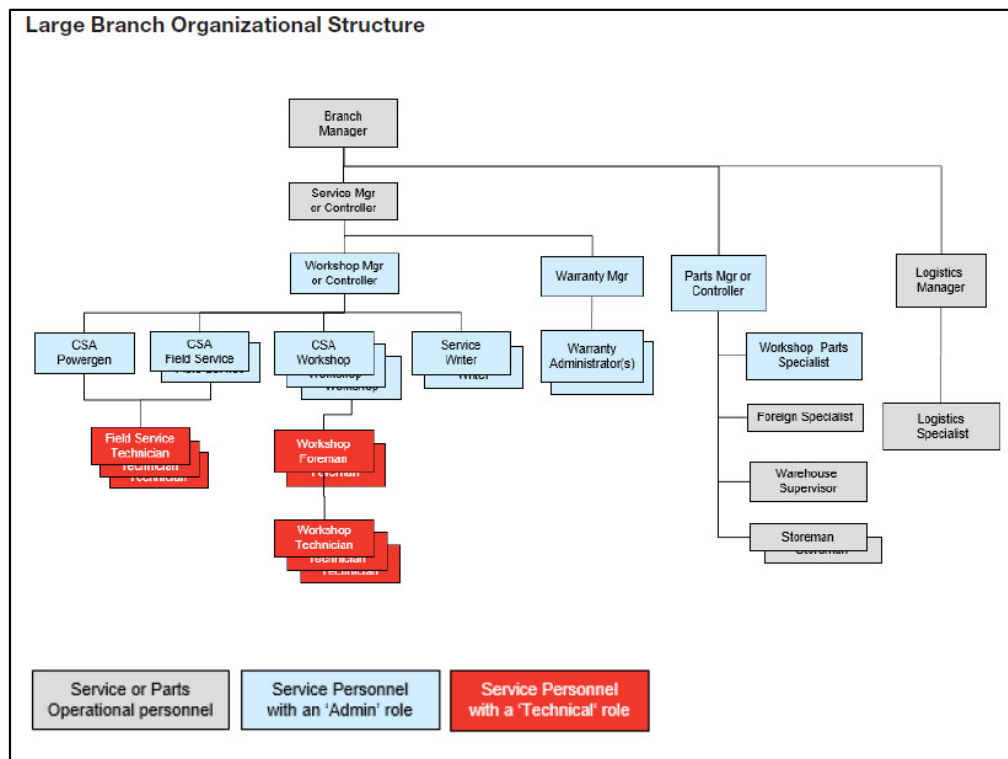
Figura 26. estructura organizacional para un distribuidor mediano. (Quickserve Playbook, Cummins Inc)
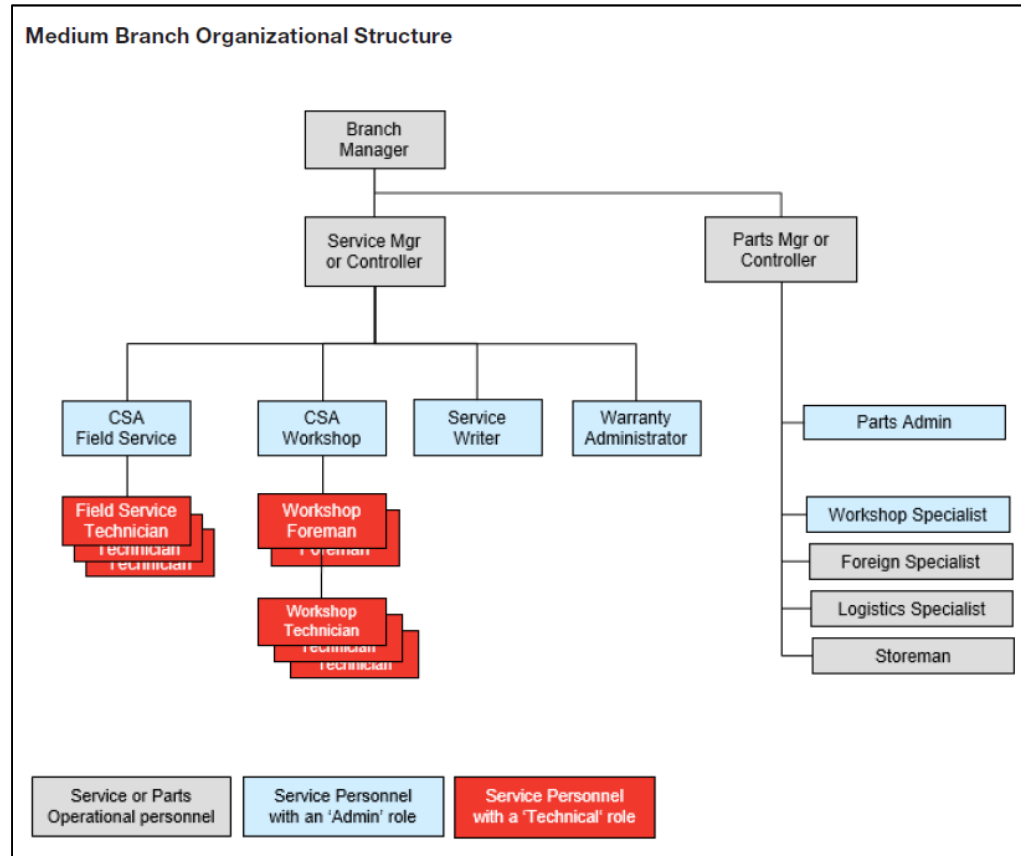
Actualmente se ha implementado una parte de esta estructura organizacional dentro del área de servicios, se han establecido los equipos de trabajo según las necesidades del mercado y las destrezas de cada uno de los integrantes del equipo. En cabeza del gerente de la sede, se han definido los roles y responsabilidades del equipo administrativo y se han compartido los objetivos propuestos por la compañía, para que estos a su vez sean extendidos al equipo técnico. A partir de esta estructuración se pudieron obtener algunos resultados durante el 2018, como lo fue a finales del segundo semestre de 2018 se obtiene como resultado del acompañamiento y seguimiento en el proyecto transcaribe, el inicio de labores y seguimiento con dos

nuevos operadores del sistema de trasnporte masivo de la ciudad como lo son Transambiental y Sotramac. Iniciando así la alianza con 48 equipos nuevos en Sotramac y continuando con la atención de los 39 equipos que se encuentran operando en Transambiental, este proyecto inicio hace 3 años con 39 motores de la marca y a la fecha cuenta con 120 equipos operando y alrededor de 50 equipos más proyectados a iniciar operación. La inclusión de los clientes Transambiental y Sotramac al proyecto se da debido a la expansión demandada por la ciudad y al trabajo realizado de la mano del representante de los equipos Busscar de Colombia, se espera iniciar con el proyecto de repotenciación de los primeros equipos a finales de este año, sin embargo actualmente hemos ejecutado proyectos de overhaul y reparación mayor a 5 equipos en los distintos operadores, campañas de mejora al 100% de la flota con lo cual hemos solidificado nuestra presencia con el operador del sistema masivo de transporte. Para el caso industrial portuario se logra afianzar la presencia de la compañía en el puerto de Cartagena mediante el proyecto de ejecución de midlifes a la flota de equipos de camiones y RTG, y obteniendo la licitación para el proyecto de ejecución de overhaul a 8 motores QSX15 durante el 2018. Este proyecto fue manejado en su ejecución con la presencia en sitio de un equipo de trabajo liderado por un técnico A (ver anexos Técnico A), quien se encargó de coordinar la ejecución de los midlifes apoyado por el asesor de servicios en la gestión administrativa, de igual manera el equipo técnico en taller de servicios Barranquilla fue el encargado de la ejecución de los overhaul a los 8 motores, liderado por los supervisores de taller y el líder de servicios de Cartagena. Igualmente, A partir de la reorganización del área se desarrolla durante los meses de septiembre de 2018 a febrero de 2019 el proyecto de alistamiento de 120 motores instalados en equipos Ford dentro de la sociedad portuaria de puerto bahía concluyendo este dentro de la fecha esperada por el cliente y sin mayores novedades lo cual represento un afianzamiento entre los lazos de Cummins y Ford para la región de Suramérica.

8.2. ROLES Y RESPONSABILIDADES

De igual manera y a partir de la organización estructural definida se hace necesario que el agrupamiento se geste de manera horizontal, reconociendo a un integrador de tiempo completo como líder del agrupamiento, de esta manera podemos lograr que las personas en común encargadas o que hagan parte de un proceso central trabajen en cadena y no de manera individual cada cual reconociendo su rol y responsabilidad dentro del equipo. Sin embargo, esta estructura organizacional hibrida también está diseñada para permitir la creación de equipos multifocales ya sea por función, división o una combinación de ambos estilos, en los cuales el control se geste de manera vertical por los líderes de cada proceso.

De esta manera la estructura propuesta en la figura 23 y según el modelo de negocio de Cummins figura 1; permite la sincronización de flujos dentro de las distintas áreas y procesos de la compañía, permitiendo una adecuada gestión de los interesados internos y promoviendo el trabajo en equipo. Con el desarrollo de una cultura adecuada en la formación de equipos ya sea de manera horizontal o multifocales se puede alcanzar la excelencia funcional, pues según una adecuada comprensión de cómo podemos ofrecer valor real a nuestros clientes, los equipos de trabajo pueden organizarse para modernizar el proceso de agregar valor a fin de reducir al mínimo o eliminar el desperdicio y otras tareas que no agregan valor como el retrabajo, retardo, almacenaje, etc. Y a su vez establecer un ambiente correcto de trabajo permitiéndose entre áreas conocer sus diferentes procesos y formas de trabajo, así cada equipo puede asegurar de que el material o la información correctos estén disponibles cuando se necesite, donde lo necesiten y en la forma que se necesite.

8.3. PARAMETRIZACIÓN DEL SISTEMA DE INFORMACIÓN DE LA COMPAÑÍA.

Apoyándonos en la estructura organizacional propuesta se propone definir un equipo multifocal quienes serán denominados como usuarios claves del sistema de información Netsuite empleado en la compañía Cummins Norte de Colombia. Este equipo de trabajo será liderado por el líder de servicios de IT para la región, la idea es que cada usuario clave escogido sea capaz de recolectar la información de los interesados de cada área, proceso y función. Para desarrollar una mesa de trabajo en la cual sean listados los problemas más impactantes a cada proceso y al cliente final, estas listas estarán organizadas de acuerdo con un nivel de ponderación establecido por el equipo desarrollador (con base de operaciones en San Luis Potosí, Mexico) para actuar según sea el nivel de impacto. Cada solución propuesta debe ser validada por el usuario clave y/o usuarios claves afectados en un ambiente de pruebas, conforme las soluciones se adapten y logren satisfacer las necesidades propuestas, los usuarios claves deberán socializar con los interesados los cambios realizados. Con esta propuesta de trabajo se pretende reducir el impacto que pueda causar el tiempo requerido por el equipo desarrollador para encontrar propuestas que se adapten a los problemas actuales y a su vez focalizar en cada área y/o proceso que el flujo de información sea recibido por una sola persona que sea quien lleve esta información al equipo desarrollador. A su vez se definir una plataforma servicedesk con personal capacitado para atender aquellas novedades que puedan presentarse a diario y de las cuales no se requieran acciones mayores o desarrollos para solucionar.

Sin embargo, durante la puesta en marcha de esta propuesta desarrollada mediante la metodología Scrum y en cabeza del líder de IT para la región, el proyecto para parametrizar de manera adecuada el sistema de información de la compañía no tuvo los resultados esperados de forma inicial. Esto debido a que la organización no tiene una cultura de proyectos y una

PMO que brinde el soporte necesario a la gestión y ejecución del mismo, este proyecto se vio afectado durante las etapas inicial y final puesto que la metodología no era conocida por todos los integrantes del equipo y en gran medida por el manejo de equipos virtuales teniendo en cuenta que el equipo desarrollador se encontraba en Mexico y la otra parte del equipo estaba dividido entre minería, Cartagena y Barranquilla, lo que represento la presencia de manera local del equipo desarrollador afectando el presupuesto que ya se había definido. Al final se pudo obtener el resultado esperado sin embargo este estuvo fuera de los tiempos pactados inicialmente por la compañía.

8.4. ESTRATEGIAS DE MARKETING

A partir de los resultados observados en las figuras 19, 20, 21, podemos determinar la ausencia de estrategias eficaces que le permitan a la compañía ganar mayor participación en sectores como lo son el automotriz, marino e industrial en la región norte colombiana.

La estrategia recomendada según el mercado local es la ejecución de promotores y campañas dentro de los diferentes sectores en los cuales se pretenda ganar mayor participación, mostrando la presencia de la marca y la capacidad de nuestro personal técnico en brindar ese apoyo que el cliente final espera. Adicional a esto promover la participación de la compañía en ferias industriales realizadas en la región norte colombiana con el propósito de mostrar nuestra marca y posicionarnos con clientes que desconocen nuestra presencia en la región. Promocionar los lanzamientos de nuestros productos como motores y alianzas estratégicas que permitan captar mercados poco explorados.

Igualmente se propone reactivar una estrategia de marketing interno conocida dentro de la compañía como NPS, la cual posterior al proceso de facturación realizado al cliente se digita una base de datos en la cual se carga información relacionada con el servicio prestado. Este sistema emite una encuesta de satisfacción al cliente por el servicio prestado y con la respuesta la compañía puede conocer la percepción del cliente ante el servicio prestado y categorizarlo como según sea el caso como detractor, pasivo y promotor.

Estas estrategias fueron implementadas durante el 2018, iniciando con la estrategias promotoras de servicios en el puerto de Cartagena logrando afianzar durante lo corrido del año nuestra presencia y captando proyectos dentro de la terminal de contenedores CONTECAR y la Soc Portuaria SPRC, así mismo se realizó la inclusión de nuestra marca dentro de ferias industriales y navales desarrolladas en la ciudad de Cartagena representando solidificar nuestra relación comercial con los clientes del segmento y apalancando de esta forma negocios como la repotenciación del remolcador RAN perteneciente a la empresa INTERTUG, y el proyecto de configuración y venta de 4 motores a la compañía OCEANOS. En cuanto a la estrategia de promotores de servicio iniciamos el 2019 con una campaña promotora en el puerto de CCTO, obteniendo de esta forma el inicio de las relaciones comerciales en cuanto a servicios y así el proyecto de mantenimientos correctivos a la flota de cargadores frontales reach stakers. Se retoman nuevamente las estrategias de medición del índice de satisfacción a los clientes NPS, obteniendo de esta forma promedios de respuesta en nuestros primeros meses del 48% del total de las encuestas enviadas y esperando cerrar el 2019 con un 100% de respuestas en el total de encuestas enviadas y con igual número de respuestas a los requerimientos de cada encuesta recibida.

9. CONCLUSIONES

A partir de la revisión y propuestas realizadas a la compañía Cummins Norte de Colombia podemos concluir que la ausencia de una estructura organizacional es un factor importante que limita el nivel de crecimiento y organización que dicha compañía puede alcanzar ante los cambios del mercado local y global. Se observa que Cummins Norte de Colombia cuenta con todas las herramientas y recursos de Cummins Inc. para desarrollarse como una empresa solida en cuanto a cultura organizacional y de proyectos respecta, se determina que algunos de los cambios organizacionales propuestos a la compañía le brindan un mejor panorama y entendimientos de las funciones y responsabilidades de los empleados ante la compañía y el cliente final, con motivo de análisis y desarrollo de algunos puntos propuestos en el actual estudio y apoyados por el líder de servicios de la unidad de Cartagena se realiza la estructuración del área de servicios según la propuesta realizada en la figura 23. Estos cambios parten del programa denominado como el año de la expansión, y se inició por compartirle al equipo administrativo y técnico del área como es la estructura jerárquica de servicios Cartagena y las funciones de cada empleado que integra el equipo. Definiendo así para el equipo técnico de Cartagena el rol de personal de campo y modificando de esta forma su horario de trabajo habitual. A la fecha se ha logrado la reducción de un 60% de las horas extras reportadas por el equipo técnico, permitiendo que este equipo crezca de 10 a 14 técnicos en 6 meses. De igual forma se ha observado mejoría en la satisfacción del personal por la reducción de la carga laboral, así como también las incapacidades por enfermedades y problemas físicos propios de la rutina. A partir de estos cambios y de la inclusión de personas al equipo de servicios (administrador de proyectos, personal técnico, asistentes administrativos) el crecimiento en cuanto a ventas del área ha cumplido una cifra récord en el 2018 cercana a los 1,5 millones de dólares con márgenes de rentabilidad cercanos al 40%.

En cuanto a la implementación de equipos horizontales a cargo del administrador de proyectos se logró a finales del

segundo semestre del 2018 la expansión de 1 a 3 clientes en el proyecto denominado Transcaribe, proyecto que inicio hace 3 años con 39 motores de la marca y a la fecha cuenta con 120 equipos y alrededor de 50 equipos más proyectados a iniciar operación. La inclusión de los clientes Transambiental y Sotramac al proyecto se da debido a la expansión demandada por la ciudad y al trabajo realizado de la mano del representante de los equipos Busscar de Colombia. Para el caso industrial portuario se logra afianzar la presencia de la compañía en el puerto de Cartagena mediante el proyecto de ejecución de midlifes a la flota de equipos de camiones y RTG, y obteniendo la licitación para el proyecto de ejecución de overhaul a 8 motores de alta potencia durante el 2018. Igualmente, A partir de la reorganización del área se desarrolla durante los meses de septiembre de 2018 a febrero de 2019 el proyecto de alistamiento de 120 motores instalados en equipos Ford dentro de la sociedad portuaria de puerto bahía concluyendo este dentro de la fecha esperada por el cliente y sin mayores novedades lo cual represento un afianzamiento entre los lazos de Cummins y Ford para la región de Suramérica.

En cuanto al sistema operativo de la compañía se logra desarrollar mediante la metodología Scrum y en cabeza del líder de IT para la región el proyecto para parametrizar de manera adecuada el sistema de información de la compañía, sin embargo, al no tener una cultura de proyectos y una PMO que brinde el soporte necesario durante el desarrollo, este proyecto se vio afectado durante las etapas inicial y final. Esto debido a que la metodología no era conocida por todos los integrantes del equipo y en gran medida por el manejo de equipos virtuales, lo que represento la presencia de manera local del equipo desarrollador afectando el presupuesto que ya se había definido. Al final se pudo obtener el resultado esperado sin embargo este estuvo fuera de los tiempos pactados inicialmente por la compañía.

La implementación de estrategias de marketing y campañas promotores en el mercado industrial y marino represento el ingreso del cliente CCTO del sector portuario con el cual se

adelantan campañas de evaluación y mantenimientos correctivos a su flota en general. A partir de los cambios en la parametrización del software y en cabeza del equipo de servicios de Cartagena se reactivan las encuestas de NPS, colocando como punto innovador el desarrollo de un informe a través del sistema de información el cual permite cargar de manera ágil la información de cada servicio ejecutado y de los clientes.

A partir de la estructura propuesta se espera que la compañía pueda cumplir con los objetivos y resultados esperados por la corporación de una forma más organizada y sincronizada de forma que nos permita superar las cifras que actualmente se están entregando a la corporación. Facilitar la creación de equipos de trabajo multifocales que sean capaces de manejar de manera adecuada cada proyecto a desarrollar por la compañía conociendo de forma adecuada las funciones de cada integrante del equipo y sus limitaciones dentro del proyecto, así mismo con el desarrollo de esta nueva estructura y metodologías se esperan inversiones de capital humano tanto en contratación como formación según los lineamientos de la corporación, con esto se pretende generar aumentos en la producción y reducción de costos teniendo en cuenta que al estar mejor estructurados nuestra compañía tendrá la posibilidad de aumentar la producción con el mínimo de recursos requeridos. Como punto importante esta nueva estructura y metodologías se desarrolla con el ánimo de generar una mayor aceptación de la marca que nos permita aperturar nuevos mercados y negocios que a la fecha no son 100% explotados o en su defecto no tenemos participación alguna, sostener las relaciones comerciales existentes generando confianza y fidelidad de parte de cada uno de nuestros aliados estratégicos y que nuestra marca sea escogida por el valor agregado que brindamos.

En el largo plazo se espera el posicionamiento de la compañía en la ejecución de todos los proyectos de tipo industriales portuario y marinos (recreacional y comercial) en la región norte colombiana, así como también la recuperación de los proyectos automotrices y powergen.

Finalmente podemos afirmar que el desarrollo de una estructura organizacional y las propuestas centradas en proyectos pueden ayudar tanto a las áreas en particulares que desarrollan dichos cambios como a la organización en lo relevante a entender y aplicar prácticas de gestión de proyectos que se encuentren alineadas con la compañía, así como para adaptar e integrar los intereses comerciales y los esfuerzos acorde a los cambios del mercado local y Global.

9.1. TRABAJO FUTURO.

A continuación, se presentan las recomendaciones del presente trabajo de investigación en función de los contenidos bibliográficos, la cultura organizacional y gobernanza de proyectos

- **Ampliación bibliográfica:** Realizar una investigación complementaria de los estándares y metodologías de gestión de proyectos con el objetivo de nutrir y ampliar los contenidos incluidos dentro de la presente investigación.

- **Creación de una oficina de proyectos:** a nivel ejecutivo y global, acompañar el proceso de desarrollo e implementación de la PMO, generando aportes significativos en cuanto a las expectativas de la corporación y los beneficios esperados, logrando un alto nivel de alineamiento respecto de la organización global. Revisar los resultados periódicamente luego dela implementación, a través de modelos de madurez con la participación de los stakeholders principales. Este ejercicio permitiría realizar los complementos, cambios, ajustes y enmiendas necesarias para lograr los objetivos propuestos.

- **Revisión de la estructura organizacional:** a nivel ejecutivo se recomienda evaluar acorde a los requerimientos del mercado y los lineamientos de la compañía posibles cambios en la estructura organizacional propuesta, esta revisión debe realizarse de manera periódica acorde a los resultados y objetivos propuestos a nivel corporación.

- **Gestión de Kpi's en cuanto a efectividad de los proyectos ejecutados:** Es importante que la compañía inicie con el registro de los datos y resultados de la gestión de proyectos en las diferentes áreas y que a su vez estos datos sean comparados con la información de ventas, esto ayudara a conocer el comportamiento de la gestión de proyectos y como los diferentes proyectos ejecutados afectan de manera positiva o negativa las ventas del distribuidor.

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ANEXOS

Perfiles de puestos globales	Función:	Clase de comp:
Gerente De Sucursal - Sucursal Mediana Única	Gerencia General	CC02

Resumen oferta de empleo:

Administra las operaciones diarias en una ubicación definida; es responsable de todas las métricas financieras y funciones en una sucursal específica con una varias líneas de negocios.

Responsabilidades principales:

Es responsable de todas las métricas financieras y funciones de la sucursal.

Aporta al plan operativo anual; administra la sucursal con respecto al plan operativo anual; observa todas las métricas comerciales apropiadas, incluidas la tarjeta de puntuación equilibrada de la sucursal, métricas de ganancias y pérdidas y métricas de activos.

Aporta al plan anual de marketing y ventas; desarrolla y mantiene relaciones comerciales con los clientes y desarrolla nuevas asociaciones y alianzas comerciales para la sucursal.

Desarrolla un entendimiento del negocio de Cummins en la región, a nivel global y en todas las unidades comerciales.

Administra la satisfacción del cliente para la sucursal según las mediciones de los programas Net Promoter Score y Lens of the Customer; desarrolla una cultura de servicio al cliente en la sucursal; contrata, capacita, motiva y retiene a empleados de servicio al cliente de alta calidad.

Administra el servicio al cliente a través de las operaciones de la sucursal; implementa y aplica el uso de procesos de servicio definidos.

Administra la presentación y el rechazo de garantías para la sucursal; desarrolla un entendimiento de problemas repetitivos con garantías y proporciona comentarios a la organización para garantizar la mejora de productos y servicios; controla el tiempo del ciclo del evento de reparación y administra las mejoras en los procesos dentro de la sucursal.

Administra la conformidad con normas y cumplimiento de salud, seguridad y medio ambiente; participa activamente en auditorías de salud, seguridad y medio ambiente.

Se asegura de que los empleados entiendan la cultura de responsabilidad corporativa de Cummins.

Administra el mantenimiento de instalaciones; administra arrendamientos; recomienda cambios en instalaciones según corresponda.

Administra, capacita y motiva a los empleados; realiza, acepta y supervisa planes de trabajo y planes de desarrollo individual para subordinados directos.

Calificaciones y competencias

Competencias:

Crea equipos eficaces - Crear equipos con una identidad sólida que apliquen habilidades y perspectivas diversas para alcanzar metas comunes.

Comunica efectivamente - Desarrollar y generar comunicaciones multimodales que transmitan una clara comprensión de las necesidades exclusivas de diferentes audiencias.

Enfoque en el cliente - Cultivar relaciones sólidas con los clientes y ofrecer soluciones centradas en el cliente.

Calidad de las decisiones - Tomar decisiones adecuadas y oportunas que fomenten el avance de la organización.

Desarrollo del talento - Desarrollar a las personas para alcanzar tanto sus propias metas como las metas de la organización.

Dirige el trabajo - Proporcionar dirección, delegar y eliminar los obstáculos para que el trabajo se realice.

Promueve el compromiso - Crear un clima en que las personas se sientan motivadas a dar lo mejor de sí para ayudar a la organización a alcanzar sus objetivos.

Empuje por obtener resultados - Lograr resultados de manera consistente, aun bajo circunstancias difíciles.

Agudeza financiera - Interpretar los indicadores financieros clave y aplicar esos conocimientos para tomar decisiones empresariales más adecuadas.

Manejo del conflicto - Manejar las situaciones de conflicto de manera efectiva y con el mínimo de ruido.

Influencia de la cultura de la salud y la seguridad - Defiende las conductas positivas de salud y seguridad al influenciar a los líderes y empleados para crear el entorno correcto.

Capacidad de servicio, capacidad y cobertura - Aplica el proceso capacidad de servicio, capacidad y cobertura para comprender las expectativas del cliente, las prioridades del negocio y dónde están

operando los productos para brindar servicio capaz y consistente a través de partes disponibles, información, herramientas y técnicos calificados de acuerdo con los estándares publicados; analiza las métricas de la capacidad del servicio para identificar, priorizar y resolver oportunidades de desarrollo de canales dentro de la red de servicios.

Educación, licencias y certificaciones:

Es obligatorio contar con un título terciario, universitario o equivalente en administración de empresas, ingeniería o en un tema relacionado.
Es obligatorio contar con certificación de cinturón verde de Six Sigma.

Experiencia:

Es obligatorio contar con considerable experiencia en el sector, incluso en gestión y presupuestos.

Version 1

Perfiles de puestos globales	Función:	Clase de comp:
TÉCNICO DE SERVICIO DE CAMPO - NIVEL I	Servicio	TECH

Resumen oferta de empleo:

Completa el mantenimiento preventivo y/o las actividades de reparación básicas en motores y componentes relacionados en el sitio del cliente con instrucciones mínimas.

Responsabilidades principales:

Interactúa con el cliente de manera cortés y profesional. Garantiza una atención inmediata y eficiente de las necesidades del cliente.
Usa herramientas especializadas y sigue políticas y procedimientos documentados para diagnosticar y completar reparaciones básicas, además prepara las herramientas y partes requeridas.
Eleva los problemas no resueltos a técnicos y/o supervisores más experimentados en servicio de campo.
Realiza actividades de mantenimiento preventivo según las normas y los cronogramas documentados en motores y componentes relacionados en el campo.
Completa la documentación requerida, como hojas de trabajo de servicio, planillas de tiempo y reclamos de garantía mediante formularios escritos o en pantallas de captura del sistema del negocio.
Completa la capacitación de acuerdo con los requisitos de habilidades y del negocio.
Brinda mantenimiento a las herramientas y vehículos para su limpieza y correcto funcionamiento.
Se asegura del cumplimiento de todas las políticas, los procedimientos y las legislaciones de salud, seguridad y medio ambiente.

Calificaciones y competencias

Competencias:

Nivel de habilidad A
Amplia capacidad de mantenimiento y reparación mecánica.
Aprendiz certificado en motores diésel (Preferentemente).
Apto para realizar reparaciones y mantenimiento externos en motores con mínima supervisión - exposición práctica a trabajo con motores diésel.
Conocimiento general del proceso Quick Serve.
Capacidad de comprender el uso básico de computadoras.
Capacidad de comunicarse claramente en forma oral y escrita.
Capacidad para comprender instrucciones escritas.
Capacidad de trabajar en forma segura e identificar riesgos de seguridad, incluyendo completar cualquier capacitación requerida de seguridad y el proceso de Evaluación de Seguridad en el Trabajo.
Puede resolver problemas técnicos básicos.
Capacidad de trabajar dentro de los estándares de calidad.
Apto para desarrollar relaciones laborales eficaces.
Destreza para usar principios numéricos generales.

Nivel de habilidad B
Nivel de Habilidad A además de:
Capacidad de realizar reparaciones básicas y mantenimiento programado en diferentes tipos de productos motorizados, sin supervisión.
Capacidad de comprender herramientas de diagnóstico.
Conocimiento general y capacidad de acceder a las herramientas de asistencia de servicio de Cummins (como Quick Serve On Line) y comprensión de aplicaciones de Microsoft.
Capacidad de preparar la documentación requerida según los estándares exigidos.

Educación, licencias y certificaciones:

Capacitado como técnico en motores de combustión interna (preferentemente).
Diploma técnico.
Licencia de conductor vigente a nivel nacional.

Experiencia:

Es obligatorio contar con una mínima experiencia laboral en el taller.
Conocimiento y/o experiencia de nivel básico con productos de motores.
Licencia de conductor vigente a nivel nacional.

Perfiles de puestos globales	Función:	Clase de comp:
TÉCNICO DE SERVICIO DE CAMPO - NIVEL II	Servicio	TECH

Resumen oferta de empleo:

Diagnostica y realiza reparaciones menos complejas a motores en el sitio del cliente.

Responsabilidades principales:

Interactúa con el cliente de manera cortés y profesional. Anticipa y asegura una atención inmediata y eficiente a las necesidades del cliente.

Aplica el uso de herramientas especializadas y sigue políticas y procedimientos documentados para diagnosticar y completar reparaciones menos complejas, además identifica y prepara las herramientas y partes requeridas.

Realiza actividades de mantenimiento preventivo según las normas y los cronogramas documentados sobre motores y componentes relacionados en el campo.

Eleva los problemas no resueltos a técnicos y/o supervisores más experimentados en servicio de campo.

Completa la documentación requerida, como hojas de trabajo de servicio, planillas de tiempo, reclamos de garantía, documentos de calidad mediante formularios escritos o en pantallas de captura del sistema del negocio.

Identifica las oportunidades de servicio adicionales con el cliente.

Completa la capacitación de acuerdo con los requerimientos de habilidades y del negocio.

Brinda mantenimiento a las herramientas y vehículos para su limpieza y correcto funcionamiento.

Se asegura del cumplimiento de todas las políticas, procedimientos y legislaciones de salud, seguridad y medio ambiente; e informa de cualquier problema/incidente al gerente del sitio y a su supervisor.

Calificaciones y competencias

Competencias:

Nivel de Habilidad A
Técnico Nivel I además de:
Capacidad de realizar diagnósticos básicos utilizando las herramientas de diagnóstico de Cummins en diferentes tipos de productos, con mínima supervisión.
Capacidad de utilizar plenamente todas las herramientas de servicio de Cummins, incluyendo Insite, EDS, Quick Serve On Line.
Conocimiento general de la terminología de política/garantía.
Capaz de desarrollar relaciones de trabajo de colaboración.
Capacidad de identificar oportunidades de mejoras en el proceso de trabajo.
Puede resolver problemas técnicos comunes.

Nivel de habilidad B
Nivel de habilidad A además de:
Capacidad de realizar diagnósticos completos utilizando las herramientas de diagnóstico de Cummins en diferentes tipos de productos, sin supervisión.
Plena capacidad de mantenimiento y reparación mecánica para efectuar reparaciones externas de motores incluyendo componentes del sistema de combustible, sin supervisión.
Capacidad de desarrollar y mantener relaciones productivas con el cliente y para educarlos sobre el funcionamiento y el mantenimiento de los productos.
Capacidad de identificar y vender más servicios y oportunidades de reparación.

Educación, licencias y certificaciones:

Capacitado como técnico en motores de combustión interna (preferentemente).
Diploma técnico.
Licencia de conductor vigente a nivel nacional.

Experiencia:

Experiencia laboral de servicio en campo de nivel básico.
Conocimiento y/o experiencia de nivel intermedio con productos de motores.
Experiencia en servicio al cliente.

Version 1

Perfiles de puestos globales	Función:		Clase de comp:
TÉCNICO DE SERVICIO DE CAMPO - NIVEL III	Servicio		TECH

Resumen oferta de empleo:

Especialista técnico y contacto principal de atención al cliente para diagnosticar y ejecutar reparaciones complejas a productos motorizados en el sitio del cliente.

Responsabilidades principales:

Establece y desarrolla en forma continua relaciones productivas con los clientes y asegura una atención inmediata y eficiente de las necesidades de los clientes.
Aplica el uso de herramientas especializadas y sigue políticas y procedimientos documentados para diagnosticar y completar reparaciones complejas en el sitio del cliente.
Realiza actividades de mantenimiento preventivo según las normas y los cronogramas documentados en motores y componentes relacionados en el campo.
Eleva los problemas no resueltos a especialistas de producto o supervisor.
Orienta y desarrolla técnicos y/o aprendices y transfiere conocimiento y experiencia a los demás; puede proporcionar indicaciones de trabajo; puede revisar planes de reparación, listas de partes, etc.
Completa la documentación requerida, como hojas de trabajo de servicio, planillas de tiempo, reclamos de garantía, documentos de calidad mediante formularios escritos o en pantallas de captura del sistema del negocio.
Identifica las oportunidades de servicio y ventas adicionales con el cliente.
Completa la capacitación de acuerdo con los requerimientos de habilidades y del negocio.
Brinda mantenimiento a las herramientas y vehículos para su limpieza y correcto funcionamiento.
Garantiza el cumplimiento con todas las políticas, procedimientos y legislaciones relevantes de salud, seguridad y medio ambiente; e informa cualquier problema/incidente al gerente del sitio y a su supervisor.

Calificaciones y competencias

Competencias:

Nivel de habilidad A
Técnico Nivel II además de:
Aptitud de entrenar al personal de servicio para desarrollar sus habilidades de diagnóstico.
Capacidad de identificar oportunidades de mejoras en procesos de trabajo y recomendar las medidas apropiadas.
Capacidad de desarrollar y mantener relaciones laborales productivas.
Aptitud para preparar informes proveyendo retroalimentación sobre intervenciones de servicio.
Capacidad de comprender y seguir el proceso de Solicitud de Asistencia Técnica (TSR, Technical Support Request).

Nivel de habilidad B
Nivel de habilidad A además de:
Capacidad de identificar y resolver las fallas del sistema de motores relacionadas y afectadas por fallas de componentes.
Capacidad de guiar/orientar a otros técnicos de servicio (incluso técnicos que no pertenezcan a Cummins) a través de intervenciones de servicio complejas y problemas de diagnóstico.
Capacidad de resolver problemas técnicos complejos.

Educación, licencias y certificaciones:

Capacitado como técnico en motores de combustión interna (preferentemente).
Diploma técnico.
Licencia de conductor vigente a nivel nacional.

Experiencia:

Experiencia laboral significativa de servicio en campo.
Conocimiento y/o experiencia de nivel de experto con productos motorizados.
Experiencia en servicio al cliente.
Experiencia en proporcionar asesoramiento técnico y orientación de técnicos con menor experiencia (preferentemente).

Version 1

Perfiles de puestos globales	Función:	Clase de comp:
Especialista en logística	Logística	CC01

Resumen oferta de empleo:

Para planear y mantener las operaciones diarias en una o más funciones de logística (por ejemplo, transporte o almacenamiento)
Garantiza que se cumpla con las expectativas y requisitos de clientes internos y externos.

Responsabilidades principales:

Desarrollar estrategias del sistema de planificación para mejorar las señales enviadas a la cadena de suministros
Controlar y ajustar parámetros del sistema de planificación.
Usar sistemas de información, herramientas y procesos comunes.
Analizar e interpretar los indicadores de desempeño clave para identificar planes de acción y áreas que se puedan mejorar.
Ejecutar los procesos logísticos operativos diarios
Identificar posibles fallas en la cadena de suministros y reducir los riesgos relacionados
Trabajar en contacto permanente con las partes interesadas internas y externas para desarrollar mejoras tácticas a corto plazo.
Utilizar el sistema de logística para impulsar señales de planificación consistentes a través de la cadena de suministros
Participar en equipos funcionales de mejoras en los procesos

Calificaciones y competencias

Competencias:

Operaciones de almacén - Usa herramientas, sistemas y metodologías de almacén para satisfacer las métricas definidas para las operaciones entrantes y salientes de un almacén.

Gestión de proyectos - Establece y mantiene el "Triángulo Balanceado" de alcance, programa y recursos para un esfuerzo temporal (un "proyecto").

Optimiza procesos de trabajo - Conocer los procesos más efectivos y eficientes para hacer que se hagan las cosas, enfocándose en la mejora continua.

Maneja la complejidad - Dar sentido a una gran cantidad de información compleja, y a veces contradictoria, para resolver problemas de manera eficaz.

Empuje por obtener resultados - Lograr resultados de manera consistente, aun bajo circunstancias difíciles.

Enfoque en el cliente - Cultivar relaciones sólidas con los clientes y ofrecer soluciones centradas en el cliente.

Comunica efectivamente - Desarrollar y generar comunicaciones multimodales que transmitan una clara comprensión de las necesidades exclusivas de diferentes audiencias.

Colabora - Crear asociaciones y trabajar en colaboración con otras personas para alcanzar objetivos compartidos.

Gestión del transportista - Respalda y evalúa el rendimiento del transportista a través de la supervisión consistente de recolección a tiempo, tiempo de tránsito y medidas de entrega a tiempo para asegurar el cumplimiento según el programa publicado y el costo nominal.

Crea equipos eficaces - Crear equipos con una identidad sólida que apliquen habilidades y perspectivas diversas para alcanzar metas comunes.

Selección de modos - Evalúa y selecciona el modo de transporte y el tipo de equipo adecuados según el carril a través del análisis del volumen del envío contra los requisitos comerciales para brindar un método óptimo de envío (equilibrio de costo, calidad y tiempo).

Educación, licencias y certificaciones:

Licenciatura en ciencia o en humanidades en el área correspondiente

Experiencia:

Debe contar por lo menos con una pasantía o una experiencia de trabajo equivalente en un cargo de logística u otro cargo adecuado de la cadena de suministros.

Version 1

Perfiles de puestos globales

Perfiles de puestos globales	Función:	Clase de comp:
Representante de ventas internas - Sénior	Ventas	CC02

Resumen oferta de empleo:

Ventas directas y soporte de ventas de productos y servicios de Cummins. El representante de ventas también tiene la responsabilidad de cliente de ventas para cuentas de clientes más complejas que puedan requerir una adaptación de la respuesta o una investigación detallada según las necesidades del cliente.
*Los roles alineados con este GPP podrían ser elegibles para un programa de compensación de ventas.

Responsabilidades principales:

Venta directa:
Vende productos y servicios de la compañía mediante el desarrollo de nuevos clientes potenciales y cuentas por teléfono o mediante el uso de otras tecnologías.
Realiza llamadas no solicitadas a clientes potenciales que surgen de una fuente de clientes potenciales externa o del desarrollo interno de clientes potenciales.
Realiza llamadas telefónicas y envía correos electrónicos de seguimiento a clientes existentes para repetir la venta y realizar una venta cruzada o de mayor valor.
Se encarga de las llamadas entrantes no solicitadas de clientes potenciales y las transforma en ventas.
Alcanza los objetivos de ingresos y márgenes y asegura la satisfacción del cliente mediante la ejecución de un ciclo de ventas desde venta potencial hasta venta concretada.

Soporte de ventas:
Crea y entrega oportunidades calificadas a los representantes de ventas cuando sea apropiado.
Asiste al personal de ventas con la cotización/gestión de RFP y otras operaciones del ciclo de ventas según sea necesario.
Contacta a clientes actuales y potenciales por teléfono o mediante otras tecnologías, y entabla una relación positiva que generará ventas futuras y lealtad empresarial.
Desarrolla relaciones para ganarse la confianza y la lealtad de los clientes.
Realiza las negociaciones en conformidad con las pautas de la empresa.
Ingresa los datos de clientes nuevos y actualiza los cambios en las cuentas existentes en la base de datos corporativa.
Mantiene entradas de ventas, informes y pronósticos precisos mediante el uso de herramientas y procesos de Cummins (p. ej., ciclo común de ventas, sistemas de gestión de relaciones con los clientes).
Busca oportunidades para utilizar las herramientas de excelencia de atención al cliente y Six Sigma centradas en el cliente para hacer crecer el negocio e incrementar la lealtad.
Planifica, prioriza y programa las actividades y los recursos del equipo para asegurar la continuidad del servicio.
Revisa el progreso y evalúa los resultados.
Se asegura de que el personal apoye a los clientes de ventas mediante la correcta utilización de las herramientas, los sistemas, la documentación, los procesos y procedimientos del departamento.
Controla el estado de las actividades de soporte de ventas para identificar áreas con problemas y adaptar los procedimientos para mejorar el rendimiento general del equipo.
Investiga, analiza y dirige las iniciativas transfuncionales para mejoras y resolución de problemas con los productos de Cummins y las cuentas de clientes.
Responde a consultas más complejas de clientes e internas escaladas sobre la disponibilidad de productos, los precios, los tiempos de entrega y el estado de los pedidos, para tratar dichas consultas de forma inmediata y precisa.
Es el enlace con los gerentes de áreas funcionales u operativas para asegurar que las actividades de soporte de ventas estén integradas con otras partes de la empresa y sean las adecuadas para las actividades de ventas actuales y futuras.
Es responsable de las cuentas de clientes más complejas, grandes y complicadas.
Analiza las consultas de clientes para identificar los problemas de usuarios recurrentes, recomendar soluciones e identificar la forma de mejorar las ventas internas.
Desarrolla directrices de resolución de problemas, listas de verificación u otros materiales para ayudar al personal de ventas a responder consultas recurrentes o rutinarias.
Lidera, dirige, evalúa y desarrolla al personal de ventas internas para asegurar que los recursos del equipo se usen eficazmente y que se cumplan el calendario de trabajo y los objetivos.
Coordina la información recibida del personal de ventas para desarrollar una comunicación completa y proactiva con los clientes.
Asegura una buena comunicación y coordinación entre gestión de cuentas, ventas, personas con influencia ascendente, gestión de ventas, ventas internas y los analistas de ventas (según corresponda) para alcanzar las metas de la estrategia de ventas y cultura, la gestión de clientes, talentos de ventas y las operaciones de venta.
Asiste en la recolección de pagos de cuentas/clientes.

Calificaciones y competencias

Competencias:

Enfoque en el cliente - Cultivar relaciones sólidas con los clientes y ofrecer soluciones centradas en el cliente.

Asegura responsabilidad - Hacerse a sí mismo y a los demás responsables del cumplimiento de los compromisos.

Planifica y alinea - Planificar y priorizar las tareas para generar compromisos alineados con las metas de la organización.

Persuade - Usar argumentos convincentes para lograr el apoyo y el compromiso de los demás.

Genera confianza - Ganar la confianza de otras personas mediante la honestidad, la integridad y la autenticidad.

Planificación de cuentas - Identifica objetivos para impulsar la implementación de la estrategia de negocios o de cuenta al comparar el estado con lo que debería haberse logrado y posibilitar la evaluación del progreso en función de metas.

Articulación de propuesta de valor - Interpreta las necesidades internas y externas del cliente sobre la base de la aplicación relevante; explica y demuestra productos, soluciones y servicios para distinguir fortalezas y debilidades a fin de satisfacer las necesidades específicas del cliente y diferenciarse de la competencia.

Desarrollo de estrategia de cuentas - Determina el estado actual de la cuenta en términos de relación, aspecto financiero, competencia del producto, obstáculos, calidad y servicio, y precisa el estado futuro deseado al equilibrar los requisitos del cliente y las capacidades empresariales con el objetivo de definir objetivos alcanzables alineados con la estrategia de negocios.

Escucha intuitiva y adaptación de soluciones - Traduce las necesidades y las expectativas en soluciones procesables mediante la escucha activa y la intuición, o bien les pregunta al respecto a los clientes, las partes interesadas, etc.; elige o produce soluciones (p. ej., cambio en proceso, herramienta, producto, servicio, etc.) para satisfacer o superar las necesidades o las expectativas de los clientes o las partes interesadas o para aportar valor.

Previsiones de ventas - Recopila y evalúa datos de los clientes de fuentes internas y externas; compara esa información con datos históricos para determinar aportes útiles y crear una previsión de futuros patrones de consumo.

Gestión de canal de ventas - Planifica proactivamente la implementación satisfactoria de estrategias y planes de ventas de nivel de cuenta/territorio sobre la base del canal actual; evalúa el estado del canal (tamaño, contenido, progreso); ajusta la estrategia de ventas, los planes o las actividades de alto impacto en consecuencia; orienta a los vendedores para lograr objetivos de ventas, según corresponda.

Educación, licencias y certificaciones:

Título terciario o universitario en ventas o comercialización, o una combinación admisible de educación y experiencia.

Experiencia:

Es obligatorio contar con experiencia previa. Se valora a los candidatos con experiencia en un cargo analista de cotizaciones y otras funciones de soporte de ventas. Podría estar obligado a viajar con cierta frecuencia. Se valora a los candidatos con experiencia en software de gestión de relaciones con los clientes. Se valora a los candidatos con experiencia en otras herramientas de software comerciales y de ventas.

Perfiles de puestos globales	Función:	Clase de comp:
Analista de operaciones de ventas	Ventas	CC01

Resumen oferta de empleo:

Es responsable de la preparación de los análisis e informes de ventas para su gerente, el personal de ventas, gestión de ventas, la gerencia general y comercialización.

Responsabilidades principales:

Prepara los análisis e informes de ventas para su gerente, el personal de ventas, gestión de ventas, la gerencia general y comercialización.
Ayuda a Operaciones de ventas y los equipos de cuentas con regiones geográficas, mercados o clientes asignados para desarrollar presupuestos anuales, previsiones de gastos y de personal e informes estadísticos.
Redacta informes estadísticos, que incluyen rendimiento de las ventas, explicaciones de discrepancias y análisis de costos.
Mantiene las herramientas analíticas de ventas basadas en las herramientas y los procesos estándares de Cummins.
Garantiza la comunicación eficaz con partes interesadas clave en relación con análisis, informes e iniciativas de ventas.
Emplea las herramientas de gestión de relaciones con los clientes disponibles para garantizar la coherencia y la integridad de los datos del canal de ventas. Utiliza herramientas para crear informes y análisis de datos.

Calificaciones y competencias

Competencias:

Cultiva la innovación - Crear nuevas y mejores formas de hacer las cosas, para que la organización sea exitosa.

Agudeza para los negocios - Aplicar los conocimientos acerca del negocio y el mercado para lograr avances en las metas de la organización.

Destreza tecnológica - Prever y adoptar innovaciones en el negocio creando aplicaciones digitales y tecnológicas.

Colabora - Crear asociaciones y trabajar en colaboración con otras personas para alcanzar objetivos compartidos.

Autodesarrollo - Buscar activamente nuevas maneras de crecer y plantearse desafíos usando canales de desarrollo tanto formales como informales.

Análisis de datos - Interpreta la información basándose en el conocimiento de las estructuras funcionales o de negocios, y hace uso de herramientas analíticas de resolución de problemas para sacar conclusiones y comunicar patrones significativos que generen conocimiento del negocio; evalúa la calidad de los datos como primer paso en el análisis.

Minería de datos - Identifica relaciones y patrones en los datos al utilizar un conjunto de técnicas de visualización y exploración de datos mediante herramientas como PowerBI, R Shiny y SAS JMP, y extrae información en datos multivariantes al aplicar los principios de la minería de datos multivariantes, pruebas inferenciales estadísticas de muestra pequeña y técnicas de reducción de dimensión para comprender la estructura subyacente de los datos y permitir sólidas conclusiones sobre la construcción del modelo.

Calidad de la información - Identifica, comprende y corrige las fallas en los datos que respaldan la gobernanza efectiva de la información a través de los procesos comerciales operacionales y la toma de decisiones.

Educación, licencias y certificaciones:

Es obligatorio contar con un título terciario, universitario o equivalente en el área contable, financiera u otra área relacionada.

Experiencia:

Es obligatorio contar con una mínima experiencia laboral relevante como profesional en el área de estudio.

Version 1

Perfiles de puestos globales	Función:	Clase de comp:
Líder del equipo de servicios	Servicio	CC01

Resumen oferta de empleo:

Supervisa grupos pequeños de empleados que instalan, realizan el mantenimiento y reparan los equipos y las maquinarias.

Responsabilidades principales:

Supervisa grupos pequeños de técnicos de servicios; coordina y programa el trabajo de los técnicos; comunica los planes de reparación a los técnicos que siguen las cotizaciones de los clientes, y controla la productividad de los técnicos y la calidad de las reparaciones.

Brinda orientación y hace comentarios a los técnicos de servicio individuales, realiza revisiones de desempeño y brinda oportunidades de crecimiento profesional.

Proporciona algo del primer nivel de apoyo a los técnicos de servicio que necesitan asistencia, y eleva las necesidades de asistencia técnica a instancias superiores cuando es necesario para su resolución.

Asiste en la logística de servicios, incluidos el uso de materiales, los equipos y los empleados, de modo que garantiza la seguridad, la calidad y la eficiencia de las operaciones.

Asiste en la revisión de cotizaciones para controlar su exactitud antes de comunicarlas a los clientes, comunica el progreso del estado de reparación y los cambios en los programas o en los planes.

Controla el estado de las reparaciones abiertas con los técnicos del taller; aborda los problemas que influyen en que se lleve a cabo o no el plan de reparación en el tiempo que se estableció en la cotización para los clientes.

Calificaciones y competencias

Competencias:

Aplicación de diagnóstico - Traduce quejas de clientes p/ desarrollar plan de solución de prob.; soluciona el prob. después de flujos de trabajo guiados, procedimientos, equipos especializados como hmtas. de servicio mecánicas y electr., y diagnostica software de PC p/ aislar componentes fallidos p/ permitir reparación exitosa; valida reparación duplicando la queja p/ asegurar que se ha resuelto; documenta resultados de solución de prob. en sist. comerciales p/ comunicar lo que se ha hecho p/ pago y seguimiento histórico.

Proceso de garantía - Analiza prob. de clientes p/ verificar la causa de error y el daño progresivo asociado mediante la inf. de servicio publicada por Cummins; interpreta el manual de administración de la garantía p/ determinar elegibilidad p/ los requisitos de cobertura y reclamación; identifica elementos asociados con la reparación que se pueden cubrir y comunicar a los interesados; archiva una reclamación en el sist. apropiado utilizando la documentación y los requisitos apropiados p/ recibir un acuerdo preciso.

Escalada técnica - Obtiene información sobre el problema técnico del producto y utiliza los recursos disponibles, incluidas las herramientas de gestión de datos; eleva los problemas a un nivel más alto de experiencia, equilibrando la puntualidad de la respuesta del cliente con los esfuerzos de investigación; captura todos los pasos de solución de problemas en la base de datos adecuada para garantizar transiciones perfectas y respuestas precisas para la resolución de tickets de manera oportuna.

Documentación de servicio - Crea y verifica el cliente, el equipo y la información técnica; captura datos específicos mediante las herramientas de servicio necesarias; sigue los procedimientos y documentos requeridos de la información en el sistema de gestión de servicios para tener un registro preciso del trabajo realizado.

Desarrollo de herramienta de servicio electrónico - Explica el alcance de todas las herramientas primarias de solución de problemas electrónicos para comprender qué herramientas son aplicables; identifica requisitos de diseño claros y sólidos siguiendo el proceso requerido para asegurar que el diseño cumpla o supere los requisitos; desarrolla y ejecuta planes de prueba para validar la herramienta de servicio.

Asegura responsabilidad - Hacerse a sí mismo y a los demás responsables del cumplimiento de los compromisos.

Comunica efectivamente - Desarrollar y generar comunicaciones multimodales que transmitan una clara comprensión de las necesidades exclusivas de diferentes audiencias.

Manejo del conflicto - Manejar las situaciones de conflicto de manera efectiva y con el mínimo de ruido.

Enfoque en el cliente - Cultivar relaciones sólidas con los clientes y ofrecer soluciones centradas en el cliente.

Dirige el trabajo - Proporcionar dirección, delegar y eliminar los obstáculos para que el trabajo se realice.

Agudeza financiera - Interpretar los indicadores financieros clave y aplicar esos conocimientos para tomar decisiones empresariales más adecuadas.

Educación, licencias y certificaciones:

Es obligatorio contar con un título otorgado por escuela de formación técnica o equivalente, o con experiencia equivalente.

Experiencia:

Se da prioridad a los candidatos con experiencia laboral en el sector, incluso en el liderazgo de equipos.

Perfiles de puestos globales	Función:	Clase de comp:
Asesor De Servicio	Servicio	CC01

Resumen oferta de empleo:

Se desempeña como contacto con los clientes clave para promover un servicio al cliente de calidad y aumentar los negocios dentro de la zona de la sucursal.

Responsabilidades principales:

Evalúa las necesidades de los clientes, reúne la información pertinente y abre las órdenes de trabajo; realiza cotizaciones, elabora reclamaciones, prepara los planes de reparación, programa el trabajo y comunica a los clientes el progreso del trabajo de reparación que se realiza en el taller. Elabora planes de diagnóstico, cotizaciones y planes de reparación determinando el tiempo que llevará la reparación basándose en la disponibilidad de las piezas y la mano de obra; revisa los planes de diagnóstico, las cotizaciones y los planes de reparación con el supervisor de servicio antes de contactar al cliente; trabaja con el supervisor de servicio para programar las asignaciones del trabajo en el taller.
Desarrolla relaciones positivas con los clientes clave; resuelve las inquietudes de los clientes relativas a las garantías de Cummins o de los distribuidores; detalla los cargos a los clientes.
Controla los indicadores clave del rendimiento del taller, que incluyen la productividad del personal y la satisfacción de los clientes.

Calificaciones y competencias

Competencias:

Aplicación de diagnóstico - Traduce quejas de clientes p/ desarrollar plan de solución de prob.; soluciona el prob. después de flujos de trabajo guiados, procedimientos, equipos especializados como hmtas. de servicio mecánicas y electr., y diagnostica software de PC p/ aislar componentes fallidos p/ permitir reparación exitosa; valida reparación duplicando la queja p/ asegurar que se ha resuelto; documenta resultados de solución de prob. en sist. comerciales p/ comunicar lo que se ha hecho p/ pago y seguimiento histórico.

Proceso de garantía - Analiza prob. de clientes p/ verificar la causa de error y el daño progresivo asociado mediante la inf. de servicio publicada por Cummins; interpreta el manual de administración de la garantía p/ determinar elegibilidad p/ los requisitos de cobertura y reclamación; identifica elementos asociados con la reparación que se pueden cubrir y comunicar a los interesados; archiva una reclamación en el sist. apropiado utilizando la documentación y los requisitos apropiados p/ recibir un acuerdo preciso.

Escalada técnica - Obtiene información sobre el problema técnico del producto y utiliza los recursos disponibles, incluidas las herramientas de gestión de datos; eleva los problemas a un nivel más alto de experiencia, equilibrando la puntualidad de la respuesta del cliente con los esfuerzos de investigación; captura todos los pasos de solución de problemas en la base de datos adecuada para garantizar transiciones perfectas y respuestas precisas para la resolución de tickets de manera oportuna.

Documentación de servicio - Crea y verifica el cliente, el equipo y la información técnica; captura datos específicos mediante las herramientas de servicio necesarias; sigue los procedimientos y documentos requeridos de la información en el sistema de gestión de servicios para tener un registro preciso del trabajo realizado.

Desarrollo de herramienta de servicio electrónico - Explica el alcance de todas las herramientas primarias de solución de problemas electrónicos para comprender qué herramientas son aplicables; identifica requisitos de diseño claros y sólidos siguiendo el proceso requerido para asegurar que el diseño cumpla o supere los requisitos; desarrolla y ejecuta planes de prueba para validar la herramienta de servicio.

Comunica efectivamente - Desarrollar y generar comunicaciones multimodales que transmitan una clara comprensión de las necesidades exclusivas de diferentes audiencias.

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Dirige el trabajo - Proporcionar dirección, delegar y eliminar los obstáculos para que el trabajo se realice.

Agudeza financiera - Interpretar los indicadores financieros clave y aplicar esos conocimientos para tomar decisiones empresariales más adecuadas.

Destreza tecnológica - Prever y adoptar innovaciones en el negocio creando aplicaciones digitales y tecnológicas.

Educación, licencias y certificaciones:

Es obligatorio contar con un título otorgado por escuela de formación técnica o equivalente, o con

experiencia equivalente.

Experiencia:

Es obligatorio contar con experiencia relevante.

QuickServe Playbook

QuickServe®

Compiled by
Al Banos, *DBU Service Business Processes Director*

For more information:
distribution.quickserve@cummins.com

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Acknowledgments

The following individuals contributed with the development of this playbook:

LS^3 The Road To
Legendary
Sales | Service | Support

Introduction

Thank you for your hard work, dedication and persistence to ensure that QuickServe is executed in every location, every time and in every service event. The QuickServe process is a Strategic Initiative for the Distribution business unit as it aims to deliver a new level of service to our global customers under a common global process. Designed to improve customer loyalty and service business performance, QuickServe is a foundational component as it empowers employees to deliver a service that is unique in the eyes of our customers.

By now, the QuickServe process should be implemented at every distributor branch, enabling more consistent and dependable service everywhere and every time. Since its launch in 2011, our distributors' efforts to implement and sustain this process have resulted in a reason why customers prefer Cummins products.

Sustainability of the QuickServe process involves all levels of the organization working together with regional and distributor QuickServe Champions across the globe to ensure consistent execution of the QuickServe process at each of our branches and regions.

I am excited to share with you this playbook, which will give you specific insight and guidance on how to deploy, measure, mature and continue improving on the execution of the QuickServe process. I am confident that this playbook will be your guide in your journey towards legendary sales, service and support.

Thank you for being part of this journey.

Pamela L. Carter

Pamela Carter
President — Distribution Business Unit
QuickServe Executive Sponsor

Purpose

The purpose of this document is to provide an easy to use handbook on how deploy, execute, measure and continuously improve the maturity of the QuickServe process in each of Cummins distributor branches.

History

Improvements in transportation and communications have raised the bar in customer expectations for service support. The market place and global infrastructure has also changed, where customers have operations in different countries which require a global, consistent and same level of support in all locations where customers have operations.

The QuickServe process is Cummins response to this customer's expectations as it is focused to provide a consistent service experience anywhere in the world. The journey began with the QuickServe Sprint in 2011 and it is Corporate's expectation that every distributor branch around the globe is executing the process with the support of a local QuickServe Process Leader and Regional QuickServe Champions.

The metrics, evaluation and learning tools have been developed and are available in the Cummins Connect and Distribution Portal. These tools were developed for each of the distributor's QuickServe Champions and Regional QuickServe Leaders to ensure that each employee at every branch is trained and coached to properly execute this process. This playbook contains information on where you can find these resources and tools.

Customer Support Excellence is a journey and not a destination, and through an effective execution of the QuickServe Process, your organization will be ready for the road ahead of Legendary Service which is an attribute that is earned and only our customers' can testify when we have reached that level.

Objective

The QuickServe 7 and 8 Step Process provides the tools and process structure to enable a location to properly handle the service event with the ultimate goal of taking great care of the customer by minimizing downtime and optimizing uptime.

The combination of skills set, training for those skills, process training, employee workstation placement, and team leadership will increase customer loyalty which will result in financial benefits for our distributor and Cummins. This process also supports other ongoing company initiatives that are in progress in our global distribution channel in the areas of safety, profitability and customer support excellence.

Creating a service that is unique in the eyes of the customer is becoming increasingly difficult in today's competitive environment. Therefore, we are relying on service to achieve competitive advantages which is why the implementation and execution of the QuickServe process is critical as it provides the foundation for that competitive edge in the way we serve our customers.

QuickServe Deployment

Before you start training people on QuickServe and deploying the process at a given branch, it is important to determine if the basic elements are in place in the branch for an effective deployment.

>> Implementation Milestones

In order to do that, it is recommended to execute the following milestones that will ensure a proper deployment of the QuickServe Process:

1. **Distributor Principal Support**

    Distributor Principals are the executive sponsor of the QuickServe implementation process. This is a cultural change for some distributors; therefore, your Distributor Principal's direct involvement is essential to give credibility to the program.

2. **QuickServe Process Champion Identified**

    The QuickServe Process Champion role is critical during and after the implementation of QuickServe. We have dedicated an entire chapter in this play book to describe the skills and function of this role in order to sustain the process for the long term. The focus of this chapter is to make the point to identify the person with the right qualifications (refer to Chapter 5 for skills and requirements of the QuickServe Process Champion) to begin and sustain the implementation of the process.

3. **Branch Milestone Plan**

    The QuickServe Process Champion needs to prepare a plan for deployment of the process at the branch. Once the plan is finalized, it needs to be reviewed and agreed with the Distributor Principal and/or General Manager.

    The branch milestone plan includes the following elements:

    a. *Gap Analysis* — Initial assessment of whether the basic service infrastructure and human resources are in place to deploy the process. The result of the assessment is the development of the Gap Action Plan, which details what needs to be done, who is responsible and when it will be completed. Please refer to Appendix A for the form to conduct the Gap Analysis.

    b. *Gap Action Plan Completed* — Date when the gaps are expected to be completed. Do not under estimate the importance of this milestone; if the Gap Action Plan was not executed; then, the embedment of the QuickServe Process will fail.

    c. *Key Performance Indicators (KPIs) Process* — In order to manage the Service business effectively, a series of KPIs need to be monitored, trended and analyze. This milestone is about establishing a system (manual or business system) to collect the following data in order to evaluate the performance of the service operation:

    – Technician Applied Hours (Labor Utilization)

    – Technician Applied Hours (Billing Efficiency)

    – Technician Available Hours

- Technician Billed Hours

- First labor applied (on a work order)

- Last labor applied (on a work order)

- Invoice date

- Open work orders (days and amount)

This data will allow the QuickServe Process Champion and/or Branch Manager/Service Manager to measure:

- Total to Billed Ratio (T/B)

- Labor Utilization

- Productivity

- Billing Efficiency

- Work in Progress

- Paper in Process

d. *Branch Service Staff QuickServe Qualified* — The QuickServe Qualification takes 3 days (2.5 days classroom and .5 day for testing). Every Service employee who is involved in the direct handling of technicians, customers, work orders and parts need to be qualified on the QuickServe process. It is important to ensure that people being qualified has taken the proper online QuickServe prerequisite to get full credit in Promotion.

e. *KPI Results* — After the QuickServe Qualification is completed and one month of KPI data collection has gone by, the QuickServe Champion needs to analyze the data to establish a baseline for each of the major service key performance indicators for that branch.

f. *Embedment Period* — It is highly recommended for the QuickServe Process Champion to stay onsite and work with each of the roles for 30 days. This will help to assist and clarify any questions or situations that the Service team may experience as they apply the 7 and 8 step process under real life conditions. The embedment period is one of the most critical stages during the deployment of QuickServe, as it is the pivotal point for long term sustainability of the process at the branch. Do not short cut this milestone, failure to spend a sufficient amount of time with the service team after the qualification is completed will limit the effectiveness of the service team to apply the steps of the QuickServe Process in their day to day operations and eventually returning back to non-process practices.

g. *Branch Audit* — 30 days after QuickServe Qualification, the QuickServe Process Champion is required to do a QuickServe audit to establish a baseline and coach the branch on any existing gaps related to the execution of the QuickServe Process.

The following table shows the recommended time that each of the milestones should take:

Milestone	Projected Completion Date
QuickServe Process Champion Identified Branch Milestone Plan Submitted	5 Days
Gap Analysis	3 Days
Gap Action Plan Completed	15 Days
Branch Service Staff QuickServe Qualified	3 Days
KPI Process	5 Days

QuickServe Branch Audit	2 Days
Embedment Period	30 Days
KPI Results	30 Days (data collection)
Total Implementation Time	93 Days

>> Critical Roles During Implementation

The QuickServe Process is based on team work. Every Service employee, along with their senior management, is key for the success of the process. Every employee has a role to make the process successful in their branch. Attached is a summary of the role in the implementation that each position takes:

Position	Role in Implementation
Distributor General Manager	■ Communicates the vision ■ Delegates authority to Champion ■ Visible proponent
Distributor QuickServe Process Champion	■ Assess branch skills, staffing and structure prior to the Process Training ■ Deliver Process Training ■ 5 weeks on site follow-up
Service Admin Staff	■ Primary training audience ■ Adequate capacity (recommended Tech to Admin Ratio of 3:1) needed to effectively run the process

>> ABO/RDO Support Provided

The Regional QuickServe Champion at the ABO/RDO level is available to provide coaching and support during the implementation phase.

This support includes:

1. QuickServe Qualification Training
2. On site embedment process
3. Training on tools available for the QuickServe Process Champion to sustain the process after implementation

The Regional QuickServe Champion is also a stakeholder of the Branch Milestone Plan as he/she could assist to remove potential barriers preventing the implementation of the QuickServe process.

>> Changing the Culture

QuickServe is a culture change for some organizations and may alter the current distributor service model, introduce substantial change and require employees to change some of their activities and habits. Here are some activities that can help distributors Principals and QuickServe Process Champions to navigate through the transition.

Communications and Education

1. Distributor Principal and QuickServe Process Champion inform everyone at the branch about the initiative: build awareness and understanding of what is the QuickServe Process. Refer to your Vision Package (Vision Package can be found in the QuickServe Portal hosted inside the Distribution Portal, or Cummins Connect for Company Owned distributors. More information on where to find information is described in Chapter 7 "Tools and Resources").

2. Distributor Principal and QuickServe Process Champion explain why this initiative is important to the branch and how it will help achieve the branch financial and customer objectives. Describe the benefits for customers and employees. Refer to your Vision Package (Vision Package can be found in the QuickServe Portal hosted inside the Distribution Portal, or Cummins Connect for Company Owned distributors. More information on where to find information is described in Chapter 7 "Tools and Resources").

3. QuickServe Process Champion develops a communication plan to keep the momentum going using: management briefings, "tool box talks", e-mail, etc. There is plenty of material available in the Distribution Portal (for independent and JVs) and on Cummins Connect (for Company Owned Distributors) to help promote the QuickServe Process internally.

4. QuickServe Process Champion educates the branch service staff about the implications and requirements of their QuickServe roles, and the flow of this process.

5. QuickServe Process Champion explains how job functions and accountabilities must change to better serve customers.

Training

1. Deliver QuickServe Qualification Training to help Service staff build competencies and skills to perform their jobs per the process. There is an online course available in the Cummins Learning Center (learn.cummins.com) that goes over the basics of the QuickServe process. This online course is a prerequisite for the qualification training, and also can be used as a refresher for people who were qualified in the past or as a process familiarization for recently hired or any supportive administrative staff.

1. Evaluate and adjust any gaps (skills, educational background) that your service personnel may have. It is critical for each of the main players of the process to understand their role and what is expected from them to properly handle the service event.

2. The QuickServe Process Champion needs to be available to the branches, ready to support questions and issues related to the execution of the process. Also, given that the Regional QuickServe Champion has visibility to best practices not only regionally but globally, it is important for him/her to work closely with the QuickServe Process Champion to ensure that all of the branches are executing the process in the most efficient way.

3. Distribute newly released *Tips of the Month*, existing documentation or quick reference materials to service personnel at the branches to help them live the QuickServe process.

4. Follow up visits by the QuickServe Process Champions to the trained locations is highly recommended, especially during the first year. QuickServe audits are encouraged as they confirm whether participants are retaining key lessons. The results of the audits will drive some adjustments, addressing any issues or re-deliver training as needed.

Organizational Change

1. QuickServe Process Champion empowerment and direct involvement will drive behavioral change as he/she will be considered as the subject matter expert in the distributor. It takes 93 days to fully implement the process in a branch. After that it will be a constant journey of continuous improvement, based on key performance indicators and QuickServe evaluation results, in which the local QuickServe Process Champions are the driving force for improvement.

2. Develop and implement job descriptions and responsibilities per the QuickServe Process requirements.

3. Ensure that your Tech to Admin Ratio supports the operation. Technician time can be easily mismanaged and lost, impacting your customer with longer downtime than expected. Therefore, finding the right ratio is critical. We recommend a Tech to Admin Ratio at each branch to be between 3.0 and 4.0 in order to run the QuickServe Process effectively and efficiently. However, your KPI results will drive the optimal Tech to Admin Ratio in your branch.

4. Human Resources should adjust their recruiting programs and employee development plans to better reflect the new QuickServe culture, competency and skills requirements. Keep in mind that employees can be qualified and trained; however, the right customer focus attitude is very critical to be successful in this journey.

Time

1. "Rome was not built in one day." Any major culture change requires time, discipline and commitment. Your QuickServe Process Champions are a long term investment, and they need to be developed to be your right arm for operational excellence. Other training that could be of benefit to QuickServe Process Champions is 6 Sigma and Cummins Operation System among others.

2. The local QuickServe Process Champion role is ongoing. Once deployment is finished, the journey towards continuous improvement and process consistency begins across branches.

A good deployment is very critical for the long term sustainability of the process and for the effectiveness on how well we serve our customers. Remember that the QuickServe process is a team effort driven by individual behaviors that have a domino effect during the entire service event. By the end of the deployment phase, the following outcomes are expected:

1. The service administrative staff (Service Advisors, Writers, Supervisors, Parts Specialists dedicated to Service and Shop Foreman) should had been qualified in the QuickServe Process.

2. The service administrative staff at the branch is executing the 7 and 8 steps in their service operations.

3. A process to obtain, monitor and review key performance indicators is in place and a baseline in each of the indicators has been established.

4. A QuickServe Audit has been done and an action plan has been developed to address initial gaps in the execution of the process.

5. A schedule of follow up QuickServe audit(s) has been agreed with the branch. The follow up audits (recommended to do one six months later if the score was less than 85%) will give visibility to the QuickServe Process Champion and the rest of the team of any remaining issues preventing the execution of the QuickServe Process.
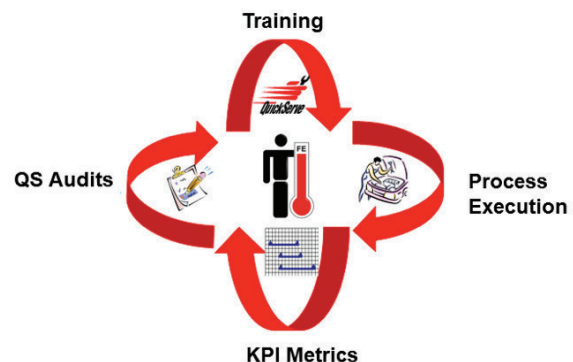
Description of Roles in the QuickServe Process

>> The Service Advisor/Service Writer

The service write up process is the most critical aspect of the service event. The tone of the entire service experience is set during the write up process. The Service Advisor/Service Writer role is critical in setting customer expectations, gathering information for the technician to be able to do his job and to ensure that the customer has a great experience. The customer wants to leave feeling that they were listened to, that their concerns will be resolved, and confident that their equipment will be well taken care of. The image the customer carries away from this process will be the image they hold of your repair facility.

The following are the main roles and responsibilities of a Service Advisor/Service Writer:

1. Meets/Greets customer, always in a professional and courteous way.
2. Phone call or onsite: he/she advises the customer that we'll look at the unit within the first hour of arrival and determine a repair plan.
3. Records contact name and phone number.
4. Ask the customer for ESN or Generator Model/Spec. Opens the work order, utilizing the Customer Interview Wizard (Service Advisor Prompt Sheet) and schedules technician.
5. Works with co-located Parts Professional to ensure parts availability before scheduling the service event.
6. Adds the agreed to scheduled date/time on the work order.
7. InShop: Includes administrative time and minimum of one hour diagnostic time, if troubleshooting is required.
8. Mobile: Quotes travel labor and round-trip mileage before dispatching technician. Once at the job site, the technician will work with the supervisor to develop and communicate the quote.
9. Prints a hard copy of the work order and ask for customer signature authorizing diagnostics and/or repair.
10. Determines warranty coverage, including looking for applicable campaigns or TRPs (Temporary Repair Practices).
11. Includes parts, SRTs or actual times to the work order.
12. Timely delivery of opened work orders to the Service Supervisor for assignment to diagnostic or repair technicians.
13. Contacts the customer upon completion of the repair.
14. Final review of all work order details with the customer.
15. Collects payment for completed services.
16. Participates in service/parts support teams to improve service operations.

>> Image is Everything

It has been said "image is everything". When it comes to customer satisfaction and loyalty, that statement becomes very true. The image of an organization that cares and can be relied upon is one that's recognized in a positive way by its customers. Net Promoter Score (NPS) is one of the major measurements we are evaluated on by our customers. The Service Advisor/Service Writer plays an important part of the initial image of the entire organization.

First Impression

First impressions are very important in business and personal relationships. They can get the customer off on the right or wrong foot depending on how the initial contact is made. Some of the first impressions a customer can have of our organization are related to the following areas:

- *Building and grounds condition* — clean, organized, well lit, cheery atmosphere.

- *Work area* — Same as above, free of congestion and shop personnel.

- *Greeting* — warm, friendly, glad to see them, willing to help.

- *Interview* — complete, interviewer listens and makes notes, asks informed questions, advanced scheduled jobs are available for the interview upon arrival.

The Interview

The interview is the key to getting the required information for the shop. It's critical to starting the job in a timely manner, looking for the right problem. The success and profitability of any service event is dependent on making good decisions and skill. Not only at the Technician level, but also at the primary point of contact with the customer, at the service counter.

Caring

Once the interview is completed and all the information is ready for the shop, are we done? No. Our image is predicated on the idea "We Care." That means we look after our customers and try to help them. Making sure their personal needs are met is critical in managing the customer's expectations and satisfaction. Small things mean a lot.

Results

What results does your branch manage? The key measures that Service Advisors/Writers have an impact on are:

- NPS
- QuickServe Customer Meter
- Repair Time Customer Measure (RTCM)
- Diagnostic Time
- Profitability
- Technician Efficiency
- Recovery Rate
- Paper in Process

Closing

They say that "the last thing said is what people remember." Make sure your customers remember "Thank You." Service Advisors/Writers should always appreciate the fact that a customer gave us a chance to do business with them. Feel good about the opportunity and thank them for providing it. Even though they may turn down a quoted job, still thank them and express our hope they will return and give us another opportunity. There are a lot of businesses selling what we have to sell. Our job is to set ourselves apart from the others.

Internally, Service Advisors/Writers represent the last person to review a Work Order prior to invoice. The clarity and accuracy of the final invoice is very important to the image of the branch.

>> The Technician

Technicians play a pivotal role in order for the QuickServe Process to be successful. Below are the main responsibilities that you need to ensure that your technicians are executing.

Diagnostics

1. After receiving the Work Order from the Service Supervisor, checks the equipment for damage prior to moving the vehicle.
2. Checks to ensure the engine information is correct on the Work Order, if not, notify the Supervisor immediately.
3. Records mileage and hours.
4. Discusses the information from the Customer Interview Wizard (Service Advisor Prompt Sheet) with the Supervisor and troubleshoots based on the complaint.
5. Performs Job Safety Assessment.
6. Following diagnostics using Insite and/or EDS, the technician discusses the repair options with the Service Supervisor and updates the Parts Requisition Form, which will assist in quote development.
7. After the quote is approved by the customer, the technician begins the repair.

Repair

1. Performs Job Safety Assessment.
2. Perform required repairs, following proper repair policies and procedures, per repair plans developed for specific incidents.
3. As parts are required for the job, the Technician completes the Parts Requisition Form to identify additional parts.
4. Technician should alert his Supervisor and Parts Professional for any additional part required.
5. Perform service events within the repair time standards established in the job plan.
6. Participate in the development of work plans and required parts lists to facilitate timely repairs.
7. Maintain work area and tools for cleanliness and proper operation.
8. Participate in continual education programs to maintain skills.

9. Maintain proper tooling, as required by Technicians, to enable efficient repair performance and profitability.

10. Requests updates to repair plans or parts list, as required, to facilitate timely repairs.

11. Participate in shop meetings on business results.

12. As required, perform services in the field at customer work sites to support product uptime performance.

13. Provide documentation of work completed via handwritten or system support labor allocation.

14. Responsible for accuracy of labor validation on repair plans.

15. Before clocking out each day, the technician reviews the SRTs or actual times performed on the job plan, initials each time completed on the job plan.

16. If additional SRTs or repairs were performed, which weren't on the job plan, those should be recorded.

17. Records all measurements and/or readings which explain the failure and what caused it.

18. All shop work which isn't recorded on repair plan or supplemental time should be recorded, either on work order or business system.

>> The Dedicated Service Parts Professional

Having the parts available and ready for the repair event is critical for the execution of the QuickServe Process.

Below are the main responsibilities of the dedicated service parts person:

1. Participates in front-end quoting process with Service Advisor/ Writer and Service Supervisor for all known parts prior to the customer's arrival.

2. Works with Service Supervisor to ensure parts are available during the entire service event.

3. Advice Service Supervisor of parts availability and possible delivery dates.

4. Order parts not available in stock for approved jobs.

5. Delivery of parts to the shop floor, designated work areas.

6. Follow-up on parts not yet delivered to support work orders.

7. If multiple shifts, the 1st and 2nd shift Parts Professionals work together to ensure seamless parts flow.

8. Participate in service performance teams to facilitate efficient service operations.

>> Service Supervisor

The Service Supervisor is directly responsible of the safety, profitability, quote development, facility maintenance and team building of the shop and field service personnel.

Below are the main responsibilities of the Service Supervisor in any branch:

1. After receiving the work order from the Service Advisor/Writer, if the customer is on-site, the Supervisor discusses the complaint with the customer. If it is a scheduled job, drop off, etc., and if the customer is not available; then, he/she calls the customer to discuss the failure or repair.

2. The Supervisor manages all job assignments based on customer need and expectations.

3. Assigns Diagnostic Technician who is required to follow all available troubleshooting trees from Cummins via QuickServe Online and/or EDS.

4. Supervisor and assigned Technician perform "free inspection" on each vehicle, looking for all possible up sell opportunities.

5. Ensures that the following steps are done during diagnostics:

   a. Use the latest troubleshooting steps in QSOL or EDS (if deployed)

   b. Record the actual values and readings from each T/S Step.

   c. Check Service Parts Topics, Early Warnings, Daily Notes, etc.

6. If after one hour of diagnostic time, there is not a clear troubleshooting path, the Supervisor is required to seek further technical assistance either through his DFSE, local Call Center or whatever technical escalation process is available at the local level.

7. Ensures that all information required to file the warranty claim is complete and accurate.

8. Works with the Technician and Parts Professional to develop the customer quote. This includes development of the SRT job plan and parts to complete the repair.

9. Quotes the total for parts and labor. For labor, always quote total dollars. Never quote or discuss labor hour for the repair. Completing a repair in less than quoted hours, is the standard in the retail service business.

10. Calls customer to discuss the quote and repair options and keeps the customer updated anytime there is a change to the quoted parts and labor total.

11. Ensure that the "Quoted Job Time" is stamped/written on each work order before assigning to a Technician.

12. If premium order charges will be incurred, the Supervisor needs to work with the Parts Department, determine delivery options and advise the customer that premium order charges will be added to the customer invoice. At that time, the customer has a decision to make, i.e., next day air, etc., based on urgency of the repair.

13. Ensures that all parts are quoted and invoiced based on agreed price. Supervisors are not authorized to discount parts prices without Parts Manager, Service Manager and/or Branch Manager's approval.

14. Manages the "promised date/time" on the work order.

15. Upon acceptance of the quote, coordinates with the Technician to resume work.

16. After diagnostics, if the customer chooses not to accept the quote, the Supervisor will invoice the minimum one hour diagnostic time, up to the time on the work order as agreed by the customer.

17. The Supervisor is in constant communication with the Technician for coordination of parts support and looking for up sell opportunities.

18. Updates the work order and/or transmits the warranty claim if applicable.

19. Anytime there is a change in the promised completion time, the Supervisor is required to update the "promise date/time" on the work order.

20. Upon completion, ensures that all SRTs, supplemental SRTs, and parts on the work order are reviewed with the Technician to ensure all labor/parts are recorded and invoiced.

21. Ensures that at least 95% billing efficiency is achieved prior to invoicing.

22. Performs a quality check on the equipment and initials the work order indicating the equipment is ready for the customer.

23. Ensures the last communication to the customer reflects that the invoice is equal or less than the quoted amount.

24. Returns the keys to the Service Advisor/Writer.

As you can see, "Value" is in the eye of the beholder, but it can be managed. It's not one person; but everyone working as a team to support every transaction. It's people knowing what their role is and carrying it out with professionalism and care. It's maintaining a clean, organized environment that makes it easy for people to do their job. And lastly, it's communication; among ourselves and to our customers. Eliminating the unpleasant surprises and building toward the pleasant ones is one way we bring value to the relationships we build through the service business.

We can't always compete on price, but if we've put together a fair quote for our services, maintained good communication, kept our promises, and considered the customer's needs we've added value that will turn into a long lasting relationship with our customers and prompt them to tell others to try us out.

Guiding QuickServe Principles for In-Shop Repairs

Step 1 — Greet the Customer

1. Attentive responsiveness to the customer.
   - Highly motivated trained personnel in CSE Service Philosophy and Standards.
   - Smile, make eye contact and acknowledge customer's presence ("I'll be with you in just a moment.")
   - "Concierge" service/customer care plan (e.g., money for coffee or soda machine, hire taxi, directions to hotel, etc.)
     – "Here are some of the things we can do for you while you wait."
   - Never say no (we can always look at everything today).
     – Don't want people turning away business.

2. Obtain unit information using QuickCheck when possible.

3. Consistent use of the Service Advisor Prompt Sheet or Customer Interview Wizard (CIW).
   - Always make the best attempt to answer all questions provided through the Service Advisor Prompt Sheet or CIW.
   - Explain to the customer why you are asking questions. "I will be asking you a series of questions regarding your equipment. This information will better assist our Technician in properly diagnosing your equipment."
   - Once the work order is printed, review the customer's responses with them. "Do you want to look over this to make sure everything is correct?"

4. Obtain accurate customer contact information including customer name, correct telephone numbers and/or email address. "At what number can we contact you concerning the status of your repair?"
   - Contact name (person most knowledgeable about the repair)
   - Contact number (best way to reach the customer)

4. Establish method of payment with the customer.
   - Check credit if appropriate
   - Check warranty coverage

5. Consistent use of a Service Scheduler (or some other scheduling tool available at the distributor) to assign diagnostic (or repair) Technicians.

6. If logistically possible, someone from the servicing organization (e.g. Service Administrator) should move the customer's vehicle into the appropriate parking area.

7. Use unit identification tag to identify the date, customer name and work order number.

✔ Additional Tips

"Fixed right the first time" starts during this step. This will set the tone for the entire service event. This is especially critical when it comes to intermittent problems. The first thing a technician will do, is to verify the Service Advisor Prompt Sheet or Customer Interview Wizard. In order for the technician to verify the engine/product problem they need to understand when, where, and how the customer is experiencing the problem. Sometimes the problem is very apparent, while at other times it can be questionable as to exactly what the customer is concerned with. It is highly encouraged for the Service Advisor/Writer not to assume they know what the problem is. Just because a problem sounds like something they worked on last week, doesn't mean it's anywhere near the same problem.

Figure 3.1   *South Pacific Job Opening Form*

A Service Advisor/Writer must be able to translate what the customer is saying into language that the Technician can understand, as well as interpret what the Technician is asking the Service Advisor/Writer or customer. Taking time with the customer, actively listening to the customer, and not making assumptions are part of collecting the appropriate information regarding the customer's concern. Understanding exactly what the customer is complaining about can be

difficult, but is critical to "fixed right the first time." Figure 3.1 shows a sample form used in South Pacific to document the customer and equipment information during this step.

In terms of the customer complaint information, the use of the Service Advisor Prompt Sheet will ensure that the Service Advisor/Writer has captured all required information for the Technician to duplicate the problem, so the proper troubleshooting can begin. The Service Advisor Prompt Sheet can be found in QuickServe Online.

It is also a best practice to document the overall integrity of the equipment to avoid misunderstandings with the customer at the end of the repair. It is important to get this document signed by the customer at the beginning, to ensure that there are no issues with the customer later for a previously identified damaged component in the equipment. Figure 3.2 shows a sample portion of South Pacific's documentation to document the integrity of the equipment before the service event starts.

Figure 3.2 *Sample format to document any vehicle damage inspection.*

Step 2 — Diagnose the Equipment

This step is dependent on the information obtained from the Service Advisor/Writer during Step 1.

8. Have dedicated personnel assigned to diagnose customer equipment. Principle is to diagnose EVERYTHING the same day.

    • Minimizes the customer's opportunity to "shop" and provides you valuable information on the work you have in front of you so that you may more effectively plan your capacity of facilities, technicians, etc.

    • *Large branch approach* — Have dedicated diagnostic Technician(s). Have backup Technician(s) available in order to diagnose everything the same day. It is important that these diagnostic Technicians are Qualified on the products supported by the branch.

- This does not imply we have Technicians sitting around waiting to perform diagnostic work.

- Establish the amount of diagnostic capacity you need to diagnose everything same day based on sampling of volume over time.

- Assign diagnostic work as the priority for an adequate number of technicians.

- If there is no demand for diagnostics at present time, assign diagnostic technicians to smaller jobs.

- Allows them to become free more quickly to maintain the principle of EVERYTHING diagnosed same day.

- *Small branch approach* — Keep best troubleshooter on small jobs so they are available to perform diagnostic work as necessary. Have backup Technician(s) available in order to diagnose everything the same day.

9. Adequate equipment/hardware at the diagnostic bay (e.g., Insite, EDS, printer, PC location for accessing programs such as QSOL, good wireless connectivity, etc.)

10. Inspect the equipment for additional work that may need to be performed beyond the base complaint.

- This is an opportunity for incremental service sales, as well as an opportunity to help the customer avoid future problems with their equipment.

NOTE: Warranty repairs are to fix only that which has failed. Warranty does not cover worn components that are still performing the function that they were designed to perform.

11. Technicians should document the cause of failure as it relates to the complaint and return to their Supervisor with appropriate details to complete the quote/repair.

✓ Additional Tips

Something that every Service Advisor/Writer needs to learn to avoid is to "diagnose on the drive." This means that the Service Advisor/Writer needs to be conscious of only collecting the information that the customer is giving them and not to draw any conclusions from it. Let the Technician do his/her job.

During this step, it is critical to document what is wrong with the product and the associated symptoms. This is very important as the repair plan and quote will be generated out of this step. Also, the Service Advisor/Writer or Service Supervisor will use this information to communicate with the customer and elaborate how we found the root cause of the problem, why we are confident that we found the issue and how are we going to fix it. If a branch is using the Expert Diagnostics System (EDS) tool; then, the DSID number needs to be recorded. The Service Supervisor will take that DSID number and log into the system to learn what was the root cause of the problem and how it was found.

Always explain to the customer what needs to happen in order to give them an accurate estimate of repair costs. Until a complete diagnosis can be performed on the problem, you won't have a good idea of what it will cost to repair the equipment. You may want to advise the customer that they will be responsible for one hour of diagnostic time. If the diagnostics take longer than an hour, the customer should be notified for their approval and an explanation should be given as to why it is taking longer than an hour. To err on the side of over communication will build a better customer experience.

Never set a customer's expectations of what the repair is going to cost until a Technician has looked at the engine/equipment.

Step 3 — Develop the Quote/Repair Plan

This step is dependent on the information obtained from the Diagnostic Technician during Step 2.

Repair planning is a function required to create a standardized set of procedures and items that will support:

1. Legitimate repair
2. Quote/estimate to prospective customers
3. Warranty claim to a vendor
4. Technician performance measures
5. Developing insight into the potential recovery/profitability of each quoted job

A repair plan has these primary components:

1. Unit/product data
2. Access code for application
3. SRTs (standard repair times) that support diagnostic and repair activity
4. Items to support diagnostic and repair activities
5. Miscellaneous charges, when appropriate
6. Items and labor to be paid by the vendor, when appropriate

Repair Plan Components

DIAGNOSTIC PLANS — Defined as SRTs and items to support actions to determine root cause for complaint/failure and possible extent of damage. They contain the following details:

1. *Admin SRT* — Supports administrative activity; paper work, clean up (tools and work area), drive units in and out of the shop.
2. *Diagnostic SRT* — Supports diagnostic activity to determine point of failure or codes that support the possible point of failure.
3. *Test activity* — Dynamometer or road testing to determine performance or substantiate failure claim.
4. *Access or connect activity* — Supports connection of specialized equipment or removal of components, or cleaning (steam cleaning) to allow access or visibility to areas to be reviewed for failure.
5. *Parts or test aids* — Enable complete and accurate testing.
6. *Narratives* — Pre-determined comments that define work performed. These include:
   • Complaint comments — customer's comments about the failure (free hand entry)
   • Correction comments — work performed

REPAIR PLANS — Defined as SRTs and items to support repair activity. They contain the following details:

1. *Repair SRTs* — Supports that actual correction activity.
2. *Access SRTs* — Supports additional component removal to gain access to primary failure area.
3. *Clean/inspect for reuse* — Supports cleanup and inspection of components that will be re-installed as a result of the repair activity.
4. *Test activity* — Dynamometer or road testing to substantiate performance.
5. *Parts or services* — Required parts list or outside services to support proper repair.
6. *Narratives* — Pre-determined comment format that define work performed. These include:
   • Correction comments — work performed.
   • Cause comments — failure code and description of primary and secondary point of failure (progressive damage).
   • Coverage comments — review any assistance provided by the vendor or customer bill.

QuickServe Playbook

Standard Repair Times (SRTs)

Standard Repair Times serve to provide the following support:

1. Establish standardized format for creating diagnostic and repair plans.

2. Provides a primary tool for developing customer quotes/estimates.

3. Provides definitions of repair steps that detail work completed.

4. Provide standard times for completing work performed.

5. Standards are established and managed by Cummins Inc. or Onan.

6. SRTs are updated periodically as required.

7. SRTs can be challenged and changed with proper documentation supporting the change.

8. They are fundamental for the sale of our services, the description of what work was performed, and the length of time to perform the work.

9. They provide a basis to develop and recognize personal performance measures.

Types of SRTs

There are several types of Standard Repair Time values:

DIAGNOSTIC SRTS — usually have a group code of 00 or TS — define the procedures to test and determine the nature of the complaint. These SRTs can be single procedures and a series of procedures carried out, starting with the least difficult to the most complex functions. The values for each step in a diagnostic SRT with multiple steps are cumulative. The last step performed is a total of all the previous steps performed. Measure for performance is taken from the last step work was performed.

REPAIR SRTs — Have group codes generally from 02 through 88 — define the actions or steps necessary to perform the required repairs. Repair SRTs can be single SRTs or contain steps. Each step has its own value and is totaled in the header (top) line of the SRT. Measure for performance is taken from each line and totaled.

Note: Repair SRTs take five different forms

1. *Repair* — SRTs specifically for completing remove and replace functions for components.

2. *Access* — SRTs to remove and install components or add-on equipment that will allow access to the primary work area. Many of these are found in group 17 and consist of non-power plant related items.

3. *Clean/inspect for re-use* — SRTs that support the inspection of removed items that will be re-installed as part of the repair function.

4. *Testing* — SRTs that support testing either through dynamometer or road testing the performance prior to or after the completion of the repair. These may be included as diagnostic procedures to validate the compliant or performance issue. These also include hookup procedures for special devices used for diagnostics such as Insight, etc.

5. *Flex* — SRTs used for activities that are not supported by existing SRTs provided by the vendor or for repairs made to products that are not supported by vendor provided SRTs. These SRTs do not have standards and may or may not be included in efficiency measures.

Repair Plan Logic

Repair plans are used to develop a fair and reasonable definition of work we have or will perform. For quotes, it represents our best estimate of what actions and items will be necessary to resolve the complaint of the customer. Repair plans help define, in terms of dollars and time, what we will provide customers in services. Repair plans can be viewed from three perspectives: a plan to execute for us, a commitment to a customer for time and price, or a repair

event billed to a vendor for purposes of warranty support. In every service event all three of these are present and must be managed.

FROM A DISTRIBUTOR BRANCH PERSPECTIVE

It provides a basis for planning and utilization of resources.

- Basis for demand/capacity management strategy.
- Provides "best estimate" strategy on what work we will perform and at what price.
- Provides basis for technician efficiency measures.
- Provides foundation for performance recognition.
- Organizes the repair effort.
- Provides a standardized format for creating service invoices.
- Provides a format for managing customer expectations.

FROM A CUSTOMER'S PERSPECTIVE

It defines the business relationship for the service event.

- Defines operations we will perform to resolve their complaint.
- Defines time we will commit to resolving their complaint.
- Gives them an opportunity to review what we propose to do to solve their complaint and the associated costs.
- Provides coverage statement for warranty or other cost support methods.

FROM A TECHNICIAN'S PERSPECTIVE

It establishes a strategy and boundaries for the repair event.

- Defines steps and procedures for carrying out diagnostic or repair activity.
- Sets time standards for each procedure.
- Is the basis of technician efficiency performance measures.

FROM A PARTS SUPPORT PERSPECTIVE

It defines the items required.

- Defines items required.
- Defines availability.
- Defines source for parts not readily available.

Building the Repair Plan

The logic for building a plan starts with easiest to complex activity.

1. Determine root failure and supporting SRTs to resolve issue.
2. Determine extent of damage from the primary failure and what additional service activity is required.
3. Determine access needs of the repair, i.e., removal of fenders, brackets, supports, panels, etc., that allow direct access to the work area or removal of the failed or damaged items.
4. Determine what removed parts will be reused for clean and inspect activity.
5. Determine primary parts for the reported failure, major components.

6. Determine support parts for the reported failure, gaskets, o rings, fluids.

7. Determine consumables, i.e., ties, clamps, hoses.

8. Define parts not immediately available, source, and delivery schedule.

9. Define the comments that support the situation, i.e., failure codes, coverage, corrections.

10. Define and resolve coverage for labor, items, the determined level of support and customer billable.

The best approach to building repair plans is to involve personnel who are familiar with the failure and product to be repaired. A combined approach involving the Service Supervisor, Technician, and Parts Professional support to determine a fair and timely strategy to resolve the repair and what parts and availability are necessary. Once the plan has been completed and assigned, review the plan and the time commitments with the repair Technician and address any questions/concerns that may exist, either about the plan or the direction of the plan.

✔ Additional Tips

12. When done correctly, there are **many benefits to quoting repairs** on the front end:
    • Required by law in some parts of the world
    • Tells the customer "how much and how long."
    • Provides shop with timing information to allow better capacity planning.
    • Improves shops labor recovery rate.
    • Paves the way to real time invoicing, which has shown over time to:
        – Improves AR recovery rate.
        – Improve shop labor recovery rate.

13. Logistically the Service Supervisor, Parts Professional and Technician should be co-located, ideally in the shop area to increase productivity and efficiency.
    • Should have dedicated parts support for the shop, whose priorities are established by Service.

14. The Service Supervisor must be familiar with the warranty administration and process (virtual college and classroom training available). Mandatory training is required for small branches where the warranty administrator is done by the Service Supervisor.
    • BMS Warranty wizard should be used for North American distributors.

15. Quote development should be completed "same day" (e.g., for parts sourcing when necessary) for EVERY job, and should be done BEFORE the repair is completed.
    • Use standard quotes (local and/or national), especially for TRPs, campaigns, service specials, etc.
    • All relevant details should be included in the quote. This will assist in expedient final invoicing.

16. Include any **upsell opportunities** in your quote, such as flat rates, service marketing specials, etc.

17. Limit quote approval time — Quote is valid for "X" number of days/hours (e.g., 48 hours). However, if customer decision is too lengthy, invoice for diagnostics. This helps the customer to make a quick decision and limits "shopping around."

In terms of documentation, Figure 3.3 is an example on how to document the parts needed to create the job repair plan. In a similar way, the expected repair time needs to be documented, as this information is critical to creating the quote for the customer. An example of a form used to document this is shown in Figure 3.4.

Figure 3.3 *Sample format to document parts required to complete a work order.*

Figure 3.4 *Sample Format from South Pacific to document SRT Times required to complete the repair*

Step 4 — Communicate the Quote

This step is dependent on the team effort (diagnostic Technician, Parts Professional and Service Supervisor) during Step 3. In addition, information obtained during the customer interview (Service Writer) is used during this step (e.g., customer contact information).

18. Quote "delivery" should include:

   • What's wrong (what was found during diagnostics)

   • Timeframe for completion

   • Communicate what (if anything) is covered under warranty

   • Price

   • Close the sale… "Can we go ahead and get started on this for you?"

   • Must be communicated "same day"

19. Document who you had the conversation with and what time you received the approval. All involved in the process should have the right information when needed. In order to avoid any misunderstanding with the customer, it is important to have some form of quotation acceptance in writing from the customer (email, purchase order, fax, etc).

20. Quote must be:

   • Accepted — Print pick ticket and assign a Qualified Technician using Service Scheduler (or other scheduling method).

   • Rejected — Invoice for diagnostic work performed.

   • Awaiting Approval (For North American Distributors "Quote Completed" checkbox selected in the BMS) — Hold for "X" period of time and re-contact customer when appropriate. "When can I expect your call back?"

21. Suggest the Overtime Premium (OTP) where appropriate to complete a customer repair in a timelier manner.

✓ Additional Tips

Customers hate surprises, and this is a critical step that can make a difference for the entire service event. This is a step that is highly overlooked as it is easier to email and/or fax the quote. Service Advisors/Writers need to make sure the customer understands what steps will be done, why they are necessary and the associated expense. Take the time to explain every line of the quote in detail, even when you are busy. Understanding each item of the repair order, and why it is necessary, will go a long way in helping the customer perceive value in their service purchase.

If the customer understands what the problem is, what caused the problem and how the repair will resolve their concern; then, the Service Advisor has done his/her job. The Service Advisor will have to determine how much the customer wants to know, needs to know, and how to deliver that knowledge. It is better to explain too much, than risk the customer walking away not knowing what they need to. We want the customer to feel comfortable to make a decision.

Finally, it is important to document when and with whom the communication took place. Equally important is to know if the quote was rejected. Remember that is important to understand the reasons why we lost the service business opportunity, so the proper steps are taken to secure every single opportunity the branch has to sell its services.

Step 5 — Carry Out the Repair

This step requires "executing the plan" developed during Step 3 and approved by the customer during Step 4.

22. A clean and organized work area is critical to completing the repair in an efficient and effective manner.

23. Parts Professional must deliver parts to the Technician. This expedites the delivery of parts to the Technician when they are needed to complete the repair and helps the Technician to stay on task.

24. Technician must update the Service Supervisor regarding any changes to the repair plan (e.g., additional parts used, additional failures, progressive damage not previously identified, additional steps necessary to perform work not originally added to the quote/repair plan, etc.).
    - This allows the supervisor to keep the customer advised with respect to status of repair and any changes in expected completion time and/or costs associated with the repair.

25. When practical:
    - Consider overtime when a Technician is nearing the completion of an event.
    - Collect the Overtime Premium (OTP) when possible from the customer.
    - Minimize cross-shift carry-over and multiple Technicians on the same job.

Technician must clean and re-organize work area, clock out, apply time to all SRTs in the plan as appropriate and clock-in on next job assignment per the Service schedule.

✓ Additional Tips

Besides the actual repair completed during this step, the Technician confers with the Service Supervisor regarding any changes to the repair plan that requires "re-quoting." The Technician notifies the Service Supervisor that the repair is complete and the work order is ready for invoicing. In terms of communication with the customer, it is during this step where we keep the customer appraised on whether the repair is going as planned, any changes in the repair plan or any other relevant information that may affect the duration of the repair. Figure 3.5 is an example of a way to document all relevant communication with the customer during this process step.

QuickServe Step 5: Carry Out The Repair (Mobile Step 6)				
Customer Contact Name:	Date:	Time:	Conversation Details:	WWID:

Figure 3.5 *Sample Format from South Pacific in documenting key communications with the customer*

Step 6 — Invoice the Customer

This step is dependent upon thorough quote development completed during Step 4.

26. If the preceding process is done correctly, this should be a simple **"press the button"** event at the conclusion of the repair.

    - If the Service Advisor and the supportive administrative team do not embrace the process of quoting up front, the standards suggested herein will be very difficult, if not impossible.

27. Every completed job must be invoiced the same day. Remember:

    - Overnight = an additional 12 hours to Repair Event Cycle Time
    - Weekend = an additional 48 hours to Repair Event Cycle Time

28. Consider "staggered" administrative shifts to ensure invoicing of late repairs.

29. Real time invoicing may seem like an unattainable goal from where a location may be today. It helps to approach this in steps:

    - Is the branch, on average, invoicing approximately the same number of jobs per day that are being open? If so, the branch has the capacity to stay current.
    - Assuming the branch has adequate capacity, focus should be put first on developing a process that will allow the branch to invoice "today's work today," setting aside the backlog of invoices for a short period of time.
    - Once the branch has mastered the "today's invoice today" process, then; the branch needs to put a plan together to eliminate the backlog over a period of time, while staying current on today's invoices.

30. Establish a plan for future improvement efforts.

✔ Additional Tips

If all the steps in the QuickServe Process were properly executed, invoicing should be a formality. In other words, after checking that the repair plan was executed according to plan in terms of labor time, parts, miscellaneous and other related costs; then, the invoice should be equal or less than the quoted amount which won't be a surprise for the customer. Remember that the invoice should contain the 4 Cs (complaint, cause, coverage and correction) as the invoice is just another form of communication with the customer, recapping what transpired during the service event.

Step 7 — Final Customer Communication

This is the last opportunity we have to leave a good lasting impression with our customer.

31. The Service organization (e.g., Service Administrator) should **drive the unit back to the front** when the customer arrives to pick up their unit.

32. Always thank the customer for their business (smile, eye contact, show sincerity).

33. Communicate with the customer our intention to ensure their complete satisfaction:
    • Consider a "thank you card" to give to all customers that offers follow-up assistance.

34. Indicate to the customer that they **may receive a survey** call to gauge their satisfaction with the overall repair.

✓ Additional Tips

When the job is completed and we're closing the transaction it's always best to ask if there are any questions. Highlight any savings we were able to provide between the quoted amount and the final invoiced amount. Some customers we've served have posed some interesting questions about invoiced values that are too far below the quote. So quoting high and invoicing low has its limits when it comes to measuring value.

In short, the best approach is to build a fair quote based on what will be done; and stick to it. Thanking the customer for their business and suggesting that if they ever need assistance, or just require regular service, we hope they will consider us again adds value. It shows we respect the fact they selected us and allowed us to provide service. We hope we can continue the relationship into the future, whatever their needs may be.

Guiding QuickServe Principles for Mobile Repairs

Step 1 — Greet the Customer

1. Attentive responsiveness to the customer.

1. Customer interview is done consistent with pre-determined checklist (e.g., Service Advisor Prompt Sheet or Customer Interview Wizard) to ensure consistent level of detail is captured.

   - The value of using the questions is to really probe regarding the nature of the issue.
   - Information needs to be made available to the diagnostic technician.
   - Enrich the Service Advisor Prompt sheet if additional questions are needed, especially for markets unique to your territory.

2. At the initial customer contact, start the work order as a quote. At a minimum, the quote should contain SRT's for administration time, travel time and diagnostic time.

   - The goal is to communicate on the front end when you can come out to look at the unit and a rough cost to the customer for completing diagnostics.

3. Establish acceptance of the price to diagnose and establish a method of payment (e.g., credit card, open P.O.).

   - Establishing a method of payment at this early stage will lessen the likelihood of being unable to collect for work performed.

4. Establish a scheduled date that is consistent with the customer's expectations:

   - If the customer's unit is down, the scheduled date should be immediate.
   - If the customer indicates someone is needed as soon as possible, the schedule date is now.
   - If the customer is calling to schedule a time, agree on a time with the customer and that date/time should be used as the scheduled date/time.

Note: Do not leave this "open-ended" or as a "come by when you are in the area," which some customers want to do to avoid travel charges. Establish a specific expectation and organize your work to meet that expectation.

Step 2 — Stage the Repair

5. It is strongly recommended that you use a scheduling system (BMS Service Scheduler for North American users or Quick Scheduler for Australian users) to allocate jobs to your resources.

   • Experience has shown that you can achieve higher throughput with the same number of hours available to sell if you have a scheduling system properly configured and use it consistently.

   • When configured properly, a scheduling system ensures that you are assigning qualified technicians with the right skills to the task at hand.

6. Connectivity for the technician is essential to field technician productivity.

   • There will be times where technicians are "out of range" of the network, even if so equipped; don't let this hinder you from moving forward, as they will be "in range" a fair percentage of the time.

   • Wireless Technician allows the Technician to record information for the work order even when disconnected from the network, which can then be uploaded once they are back in range.

   • If you are just starting to enable technician connectivity, start small. Establish a pilot of a few technicians and work out the bugs. Once you have it operational and effective within your pilot group, you are ready to roll it out to a broader group.

7. Technicians' truck inventory should be set up to inventory a supply of parts consistent with the type of work that the individual technician is typically assigned to perform.

   • Each truck in your fleet may have a different inventory of standard items to carry.

   • You should have a systematic process for re-stocking the trucks.

8. Determine potential parts needs from customer interview results and stage the parts for the Technician. The better job that is done during the customer interview process, the more likely that the staged parts will be those needed to carry out the repair.

9. Dedicated parts resource(s) should be assigned to the service process. They should be located with the service personnel and their priorities should be established by the service group.

   • Otherwise, you will invariably find your service parts support tending to other issues within the parts organization and you will not get the kind of support necessary to provide responsive support in service.

10. Establish a culture of "getting the parts to the technician" vs. "the technician getting the parts."

    • It will not always be the case that parts are delivered in the field to the Technician.

    • Method for bringing this culture alive will differ by territory, size of branch, etc.

    • Establishing this type of culture will help you keep your technicians on task, which will lead to faster cycle times.

Step 3 — Diagnose the Equipment

This step is highly dependent on the information obtained from the Service Writer during Step 1.

11. This is most effectively accomplished when you have the right Technician for the job at hand. Ensure that you are assigning a Technician with proper qualifications for the anticipated work (based on the customer interview) whenever possible.
    - Not as easy to recover is the dispatched technician doesn't have the right capabilities as is the case with reassigning work in-shop.

12. Mobile connectivity can give the technician access to the tools necessary to properly and thoroughly troubleshoot the customer's equipment (e.g., QSOL, EDS, Email, etc). Ensure that the assigned technician has given access to the appropriate tools based on the type of work to be performed.
    - Tools will vary for engine technician vs. power generation technician, etc.

13. Establish a clear escalation path and process for technical support.
    - Technician should be clear on who to call if they require technical assistance.
    - Establish a standard to escalate an issue if troubleshooting is exceeding allocated time for diagnostics.
    - The Service Supervisor needs to be "in the loop" if technical assistance is being sought and this is likely to impact timing of completion of the work, so that they may appropriately manage resources and customer communications.

14. Ensure that technician does a Job Safety Assessment (JSA) before performing any work on the equipment (there is a dedicated chapter in this playbook in reference to JSA).

15. Inspect the equipment for additional work that may need to be performed beyond the base complaint.
    - This is an opportunity for incremental service sales, as well as an opportunity to help the customer avoid future problems with their equipment.

NOTE: Warranty repairs are to fix only that which has failed. Warranty does not cover worn components that are still performing the function that they were designed to perform.

Step 4 — Develop the Quote/Repair Plan

16. Quote EVERY job with a detailed quote:
    - We owe the customer an estimated time of completion and an estimated cost to perform the repair.
    - The quote is also a valuable tool for the servicing location.
        - Knowing approximate time to complete the repair is information that can be used in scheduling other work and communicating timing expectations to both this customer and other customers.
        - Quoted jobs are much more likely to be ready for invoicing in a timely manner at the completion of the job.
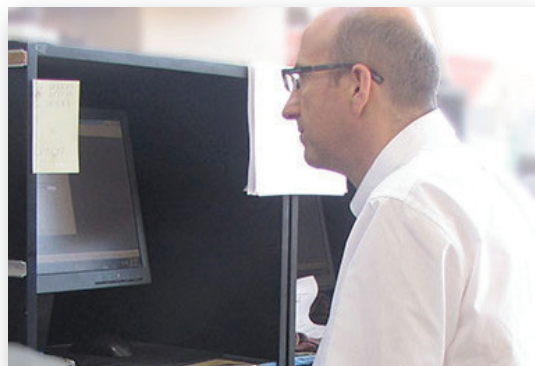
17. Involve the Technician with respect to time to complete the repair, so that you may accurately communicate expectations and plan work.

18. Make the quote available to the Technician so that they know allowable time, parts required, etc.

19. Warranty and policy determinations should be made at this step in the process and built into the quote.
    - Should be completed by your front line service personnel (Service Supervisor).
    - Is part of an "everything done up front" approach that is conducive to timely invoicing and a "no surprises" approach with the customer.

20. Place a special focus on prompt and thorough communications with the customer.
    - You should volunteer the information, not make the customer call for it.
    - The customer should have a clear understanding on "how much" and "how long."

21. Incremental work identified that will not be completed during this repair should be documented (for North American users of BMS you can use the command "Recommended Repair"), so that such opportunities can be revisited and capitalized upon at some future date. Establish a quote expiration time where you will invoice for troubleshooting if you do not receive approval.
    - Some have used 24 — 48 hours for this time limit.
    - Communicate to the customer your desire to fix their equipment issue in a timely manner.

Note: This type of limit will not work with every customer in every situation. Directionally, however, you want your process to allow for timely decisions so that you can manage the competing demands of various customers on a day-to-day basis.

Step 5 — Communicate the Quote

22. Communication should flow in the following order:
    - Establish value: what failed, any progressive damage and what is required to complete the repair.
    - Establish time to complete the work (promise date).
    - Establish any coverage(s), including policy where possible.
    - Price
    - Quote will be good for 'X' hours or days.
    - Ask for the order!

Step 6 — Carry Out the Repair

23. Ensure the Technician is Qualified on the product for this work order.

24. Ensure the Technician performs a Job Safety Assessment before starting the repair. There is a dedicated chapter in this playbook that explains how to do a JSA.

25. Ensure a clear line of communication between the Technician and the Service Supervisor.
    - Information MUST be communicated and cleared through the Service Supervisor BEFORE they are made.

26. Maintain a status of the repair throughout the repair process.

27. Technician should communicate with the branch when complete (before going to the next job site, where possible).
    - Allows for staying on top of schedule, both in terms of resource allocation and in terms of timing for subsequent customers.
    - Facilitates invoicing and customer communication

28. Look at options for delivering parts to the job site wherever possible, so that the Technician can stay on task.

29. Complete jobs you start on the same day whenever feasible.
    - A return trip will add at least a half of a day to cycle time vs. finishing on the day you started.

Step 7 — Invoice the Customer

30. If the preceding process is done correctly, this should be a simple but critical event at the conclusion of the repair.

31. Today's completed work should be invoiced today.
    - If you aren't there yet, it is recommended that you get to this first, then establish a timeline where you will "reduce" the backlog until it is eliminated.
    - There will be some exceptions to this rule (e.g., emergency call outs, after hours/weekends, jobs completed after hours, etc.
      - Handle these exceptions next day vs. calling in admin support.
      - Do not allow the exception to become the reason for abandoning the rule!!!

Step 8 — Final Customer Communication

32. Establish standards for returning product to the customer and closing out the repair, such as Email the invoice or letting the customer know right away that the equipment is ready to avoid extending unnecessary downtime due to poor communication with the customer.

33. Thank the customer for their business.

ABO/RDO QuickServe Champion, Distributor QuickServe Process Champion and Branch QuickServe Process Owner

Service Profitability is a key element of the efforts around LS3 (Legendary: Sales, Service and Support) as it has a direct impact on our ability to service our customers. The deployment of Key Service Performance Indicators (KPIs) through the QuickServe Sprint in 2011 started a journey towards better management of the Service business, by using these metrics to drive efficiency in our service operations. For example, at a very high level, improvements on T/B ratio generates extra hours that can be sold; or in other words, a reduction in Service Department expense. From a global perspective, efficiencies in service operations represent an opportunity for CMI to gain additional revenue if more technician hours are sold by gaining operational efficiencies.

These operational efficiencies can be driven by optimizing technician labor utilization, managing WIP, improving invoicing times, timely filing of warranty claims, and minimizing unrecovered warranty, among other activities which are all related to QuickServe Process adherence. Service profitability requires a focused approach to keep driving towards continuous improvement by directing efforts and activities of distributor QuickServe Process Champions in the field. Therefore, it is critical for every ABO/RDO to have a dedicated QuickServe Champion who can drive diligence to QuickServe Process adherence, constantly monitor these KPIs and drive improvements by providing direction, coaching and education to QuickServe Process Champions in the field. Due to the nature of the role, it is highly recommended to have one full time QS Champion for every 10 distributors for a given territory in order to provide the proper Champion care to each distributor and thus achieve process consistency in every branch and in every repair event.

>> ABO/RDO QuickServe Champion Job Description

The ABO QuickServe Champion supports each of the distributor QuickServe Process Champions in their efforts to bring process consistency across all branches in his/her assigned region.

The ABO QuickServe Champion assists regional QuickServe Process Champions by providing QuickServe Qualification Training to new QuickServe Process Champions.

The ABO QuickServe Champion monitors key service performance indicators at a distributor level on a monthly basis to understand process performance and provide coaching to the local QuickServe Process Champion to correct problems and improve performance. The QuickServe Champion also provide onsite tactical support for QuickServe Process Champions on day to day operations and management. Let's remember that the main objective is to take care of our customers in a profitable way, building and developing improved process performance in distributor branches.

>> Key Responsibilities of the ABO/RDO QuickServe Champion

- Champions Service Profitability targets by monitoring, analyzing and driving improvement actions based on KPIs at a distributor and regional level.

- Supports Distributor QuickServe Process Champions to ensure that improvement actions are taking place (e.g. WIP reduction efforts, reduction in warranty rejections, etc.).

- Highlight KPI Performance issues at a distributor or regional level.

- Holds monthly peer to peer reviews with QuickServe Process Champion at a distributor.

- Holds quarterly regional reviews with all QuickServe Process Champions in the region.

- Works with Senior ABO/RDO Leadership to remove barriers preventing the execution of the QuickServe Process.

- Advises on service staff needs/request from the region using the tools available.

- Bridges communication with Corporate and assists to disseminate key pieces of information, training, etc.

- Works cross functionally to assist with other related activities that impact the execution of the QuickServe Process such as JSA, EDS, etc.

- Assists on training new QuickServe Process Champions or to conduct new QuickServe Qualification classes.

- Assists on Performing Corporate Audits

  - Works with Corporate team to determine audit program for the year
  - Identifies Branch
  - Conducts audit
  - Assist local QuickServe Process Champion to create an action plan
  - Follow up on the action plan
  - Works with ABO Senior Leadership to resolve issues preventing the execution of the action plan.

- Drives Continuous Improvement

  - Based on KPI information and audit results, assists to identify improvement projects in the distributor.
  - Based on KPI information, assists to determine common regional strengths and gaps in the process.
  - Shares best practices regionally and with the Corporate team.
  - Travels to the region and spends time with local QuickServe Process Champions, coaches Service Staff to better execute their roles in the process and explains the correlation of their work with their KPIs.

QuickServe Playbook

- Regenerates commitment from key QuickServe roles to maintain the process and continue with the development of local QuickServe Process Champions.
- Participates and assists on Lean Projects such as 5Ss.

■ Customer Attitude

- Monitor customer feedback from each branch (NPS survey verbatim and trends) to understand how process skills and behaviors impacts customer perceptions, and work with branch staff to improve customer loyalty, process adherence and responsiveness to customer requests by analyzing QuickServe Customer Meter and RTCM data.

>> ABO/RDO QuickServe Champion Skills

FUNCTIONAL/TECHNICAL

■ Detailed knowledge of the QuickServe Process and performance metrics.

■ Solid understanding of the concept, analysis and interpretation of: NPS, QuickServe Customer Meter and RTCM.

■ General knowledge of Cummins products.

■ Understanding of financial concepts (P&L).

■ Operations management experience.

■ Excellent communication skills — written and oral.

QUALITY AND IMPROVEMENT

■ Customer led attitude and orientation.

■ Experience with analytical tools and methods.

■ Able to develop and manage performance metrics for teams.

TEAMWORK BUILDING

■ Ability to lead teams.

■ Good coaching and listening skills.

■ Ability to work up and down management levels.

■ Dedicated to helping teammates succeed.

■ Ability to coach and motivate those who may not report directly to this position.

LEADERSHIP

■ Initiative and ability to work independently.

■ Able to build strong personal relationships.

■ Comfortable and confident in communicating with senior leaders.

■ Ability to lead to agreement when there may not be team consensus.

QuickServe Process Key Roles:		
Service Advisor/Writer	▢ Greet the Customer ▢ Invoice ▢ Final Customer Contact	▪ Manage Service interaction with the customer. This role is main point of contact for the customer. Work Order opened and customer details obtained correctly. ▪ Ensure quoting and invoicing completed.
Parts Proffesional	▢ Develop the quote	▪ Ensures that parts are available or in order to complete the repair
Service Supervisor	▢ Develop the quote ▢ Diagnose the Repair ▢ Communicate the Quote ▢ Carry out the Repair	▪ Discusses repair options with the technician and develops the quote/Repair Plan. Review repair options with customer. Ensures that technician paperwork completed correctly and parts availability for repair.
Technician	▢ Stage the Repair ▢ Diagnose the Repair ▢ Carry out the Repair	▪ Ensure JSA completed correctly, identification of root cause, assists with development of the repair plan and Repair Order paperwork completed and any progressive damage noted.

>> Distributor QuickServe Process Champions

The Distributor QuickServe Process Champion ensures execution of the QuickServe Process at each of the distributor branches in the distributor's territory. The Distributor QuickServe Process Champion assists Service Managers by providing training and constant coaching to the branches on each of the roles and steps (refer to table below) in the QuickServe process.

The Distributor QuickServe Process Champion must be an agent of change and act in a non-bias, independent way, especially while conducting QuickServe audit evaluations. The overall spirit of this role is to continously challenge the organization to consistently execute the QuickServe process without excuse. Therefore, the Distributor QuickServe Process Champion needs to challenge the status quo and provide the coaching and support to branches in order to make the required changes for process discipline and consistency. It is equally important that the Distributor QuickServe Process Champion participates as an extended staff member during Principal's branch business review meetings in order to keep the focus on process execution, KPIs and to elevate any barriers preventing the execution of the QuickServe process.

Key Responsibilities of Distributor's QuickServe Process Champions

As part of the continuous effort to bring consistency and continuously improve the execution of the QuickServe process at a branch level, it is important for Distributor QuickServe Process Champions to execute the following actions as part of his/her individual work plan:

- Conduct QuickServe audits to evaluate process performance at each of the distributor's territory branches. The Distributor QuickServe Process Champion coaches the branch service staff members on any gaps identified during the audit and assists branch Service leadership staff on putting together an action plan to eliminate those gaps.

- Monitors the execution of the action plan with the branch leadership and raises any issues/barriers preventing the execution of the action plan to the distributor management.

- QuickServe qualifies and develops Service Advisors, Service Writers, Parts Specialists (dedicated to support Service) and Shop Foremen in the skills, knowledge, attitude and effort required to consistently execute the QuickServe Process well.

- Ensure Senior Distributor Leaders understand the basic elements of the QuickServe Process and resource dependencies. Keeps leadership appraised of the overall QuickServe Process performance, issues, and needs across the distributor's territory.

- Ensure all service staff at a branch has taken the 1 hour QuickServe Process Basics on a yearly basis.

- Makes recommendation on the quantity and ratio of Service Admin staff to Service Technicians at each branch for optimum process performance, and work with Distributor Senior Leaders to correct related issues.

- Recognize staff who consistently execute the process well to achieve high performance, and strongly discourage behaviors intended to circumvent the process or "game the numbers."

- Regularly visit branches to monitor process performance. Help to improve process skills, and work with leadership to remove barriers. Emphasize process discipline.

- Monitor key performance indicators for each branch on a daily basis to understand process performance, and provide coaching to Service staff as needed, to correct problems and improve performance.

- Monitor customer feedback from each branch (NPS survey verbatim and trends) to understand how process skills and behaviors impacts customer perceptions, and work with branch staff to improve satisfaction.

- Monitor customer feedback on the execution of the QuickServe Process by analyzing QuickServe Customer Meter and RTCM data.

- Ensure Service Technicians are properly trained, qualified, and equipped to efficiently diagnose and repair the products they work on.

- Ensure Service Technicians understand the basic elements of the QuickServe Process and how it impacts their daily work.

- Participate in the selection and career progression of customer facing Service staff to ensure they have the necessary traits, attitudes and ability to succeed in their roles.

>> Branch QuickServe Process Owner

Each branch should have an identified QuickServe Process Owner, who in general terms, is either the Service Manager or Branch Manager or could be assigned to somebody else. As the title implies, this is someone who ultimately is responsible for QuickServe Process execution at a branch level and ensures the closure of gaps identified during the QuickServe Process audit. While this is not a dedicated role, it is important for the Distributor QuickServe Process Champion to clearly identify who will be accountable for consistent QuickServe Process execution at the branch.

The Journey towards Continuous Improvement

The Distributor QuickServe Process Champion monitors key service performance indicators (KPIs) at a distributor and branch level on a frequent basis to understand process performance, and provides coaching to the Service Managers and/or share best practices from other branches to correct any operational issues reflected in the metrics. In other words, the Distributor QuickServe Process Champion provides tactical support for those branches struggling with the process.

As mentioned above in the key responsibilities section, it is highly encouraged for the Distributor QuickServe Process Champion to ensure that everyone at each of the branches has taken the QuickServe Process Fundamentals Course found in the Cummins Learning Center on a yearly basis and any new service administrative employee has been QuickServe qualified. If the Distributor QuickServe Process Champion is visiting a branch, he/she needs to account for a 30 minute round table review with the branch service staff to clarify any questions/concerns that people may have regarding the process.

Optimal Performance Targets

Both ABO/RDO QuickServe Champions and Distributor QuickServe Process Champions need to aim for the same KPI goals; while these targets might be difficult to achieve at the beginning, these are optimal targets worth aiming for the long run.

PIP (Paper in Process)   Invoice less than 12 hours once the work order is completed for InShop. For Mobile repairs, invoice less than 24 hours once the work order is completed.

Repair Event Cycle Time   In-Spec $\geq$ 60%

QuickServe Customer Meter $\geq$ 90%

RTCM $\geq$ 90%

Labor Utilization   > 85%

The explanation and details on each of these metrics can be found on the Key Performance Indicator chapter of this playbook.

Safety

Our places of work are varied, from Cummins locations (such as workshops and warehouses) to Customers sites which may be in different countries to your own and work to a diverse range of practices and methods.

Injury-free living . . . it's our responsibility.

In our communities

In our workplaces

In our homes

This chapter focuses on technician jobs and the JSA process. The JSA process must be viewed as a tool to ensure the welfare of our technicians as it provides a mechanism for us as leaders to actively care for them and their families. It is important to emphasize that is not about checking the boxes but about caring for each other. At Cummins, world class Health, Safety and Environment (HSE) is an overall culture in which HSE is an organizational value. Actively engaged and personally invested leaders and employees at all levels are working together to sustain and continuously improve HSE work methods, behaviors and conditions beyond the expectations of legal regulations, industry targets and best in class indicators for excellence. These defined, scalable and repeatable process, which others choose to benchmark or emulate, are resulting in measurable improvement to the standard of living for our employees, contractors, stakeholders, families, communities and environment.

Every employee has a responsibility to ensure their own health and safety, and to ensure others are not put at risk by their acts or omissions at work. As part of the QuickServe process, Service Advisors, Service Supervisors, Shop Foremen and QuickServe Process Leaders are to enforce the use of the JSA and take an active role on driving a safety culture. This active role is demonstrated by reviewing their technician's JSA feedback during tool box talks or during JSA Observational audits. In general, there are 3 main actions that technicians should execute:

1. To understand and comply with Cummins health and safety policies and procedures (use of JSA) and those specific to their team.
2. To always act in a manner so as to ensure their own health and safety at work and that of others who may be affected by their work activities.

3. To report accidents, symptoms of work-related ill health, damage to the building or equipment, near misses (that might have resulted in injury or damage), and other health and safety hazards, promptly to their Manager or Supervisor.

Now, let's talk about the Job Safety Assessment, its components and how it is filled out.

>> Introduction to Job Safety Assessment (JSA)

JSA Risk Assessment

JSAs are very important in our process as they help us to prevent accidents before they occur. We want to ensure that technicians complete the JSAs in order to improve the working environment and the safety culture.

The Job Safety Assessment Process splits in two parts:

- Pre-Job JSA
- JSA Observational Audit

Pre-Job JSA

- JSA is a tool to conduct a pre-job risk assessment so as to identify any hazards on or around the task you are about to complete and to put controls in place if there are any at risks.
  - JSA — Done by Service Techs (Shop and Field, including Power Gen) using a JSA Checklist.

- If the conditions of the task change at any time then the JSA risk assessment will need to be updated.

- If a technician feels that the area or task has become unsafe and is not controllable; then, the technician has the authorization to stop the job at any time. The technician must report this to his/her manager.

Job Safety Assessment (JSA) — A form developed for use within non-process driven environments such as service operations. JSA relies on the technician to identify potential hazards prior to beginning a repair order or other work where variability of job hazards is continuously changing. JSA is a tool that serves to remind a technician to think about potential hazards and prepare for them before they become a barrier to working safely.

Every technician shall complete the Job Safety Assessment Checklist prior to starting any assigned work order.

The Job Safety Assessment/Audit Checklist (JSA) is a tool to assist technicians in ensuring they are properly prepared to begin working on any assigned work order. The JSA is divided into two primary sections: Header and Critical Behaviors.

Header

The header section includes basic information about the job; the work order number, branch location and task description.

>> Critical Behaviors (Assessment/Audit Criteria)

The Assessment/Audit Criteria section is broken down into five categories outlining 30 critical behaviors related to working safely within service operations. Technicians need to assess the hazards of each work order based on these behaviors prior to beginning the work, when returning from lunch/breaks, and/or any time conditions change which may create additional hazards.

There are five categories with individual critical behaviors to be evaluated by the technicians before the start of any job. These are as: Work Practices, Ergonomics, Tools — Equipment, PPE and Work Procedures. Now, let's discussed what it is included on each of these five categories.

>> Work Practices

The descriptions of all critical behaviors inside this category are as follows:

Job Safety Assessment   Does the technician prepare to work safely by assessing the hazards of each work order prior to beginning work?

Ascending/Descending   Does the work order require climbing into or out of engine compartments, onto the roof of a building or bus/RV, using a ladder or stairs to gain access to a piece of equipment to be serviced?

Communication   Does the work require more than one person working together? Are others present that if communication didn't exist it would create hazards?

Eyes on Hands/Work   Does the technician pay attention to where their hands are in relation to hazards? Are they aware of hazards before placing their hands in an area they cannot readily be seen?

Eyes on Path   What hazards exist in the technician's path of travel? Trip/Slip hazards from materials/equipment on floor, suspended items that may strike them if not seen. While operating vehicles — backing hazards, other vehicles, etc.

Line of Fire   Is there anything that could swing, fall or discharge resulting in injury to the technician? Are tools and equipment in serviceable condition to prevent slipping when force is applied resulting in hands striking other objects or components?

Pinch Points   Is the technician aware of points where hands, fingers, other body parts, clothing, etc. could be caught between or drawn into equipment resulting in injury? Fan belts on running engines, bench grinders, doors on vehicles, etc.

Rushing   Does the technician plan their work so that it may be completed within the allotted time to prevent rushing? Rushing promotes taking shortcuts, which can lead to accidents resulting in injuries.

QSOL Procedures   Is there a QuickServe Online (QSOL) procedure associated with this task? Is the technician following the QSOL procedure?

	Critical Behaviors	1-L-2	Safe	At Risk	Closed / Controlled	If Closed or Controlled, How ? If Not, Action Required, Responsible Person & Deadline
Work Practices	Job Safety Analysis					
	Ascending/Descending					
	Communication					
	Eyes on Hands / Work					
	Eyes on Path					
	Line of Fire					
	Pinch Point					
	Rushing					
	QSOL Procedures					

>> Ergonomics

The description of all critical behaviors to be evaluated as part of this category are as follows:

Back-Bending/Twisting   Does the work require working in awkward positions bending their back greater than 45o and/or twisting for extended periods of time? Do they take time to stretch periodically to relieve pressure on their spine?

Knees   Will this job require kneeling or bending of the knees greater than 45o for extended periods of time? Are knee pads or a kneeling pad available to reduce stress to knees?

Lifting/Lowering   Will lifting/lowering be required when performing this job? When lifting 50 pounds or less, does technician squat down to lift using legs vs. bending over at waist, do they keep the load close to their body? Is mechanical assistance available/used or another technician available to assist when lifting/lowering greater than 50 pounds?

Pushing/Pulling   Does the technician pull when using arms and push when using legs?

Ergonomics	Back-Bending / Twisting				
	Knee				
	Lifting / Lowering				
	Pulling / Pushing				

>>   Tools and Equipment

The description of all critical behaviors to be evaluated as part of this category are as follows:

Tool & Equipment Selection   Does the technician take the time to get the right tool and inform manager if right tool is not available?

Tool & Equipment Condition   Does the technician inspect their tools & equipment prior to use to ensure it is in serviceable condition? Using damaged tools & equipment may result in injuries or damage to customer equipment?

Tool & Equipment Use   Does the technician understand how to properly use the tool, are they using it in the manner in which it is intended?

Truck, Trailer, Crane, Forklift Condition   Does the technician inspect the condition of any vehicles, trailers cranes and/or forklifts before using them? Do they report any damage which may result in unsafe operation to their manager?

Tools-Equip.	Tool / Equip. Selection				
	Tool / Equip. Condition				
	Tool / Equip. Use				
	Fork-Lift, Truck, Trailer				

>>   Personal Protective Equipment (PPE)

The description of all critical behaviors to be evaluated as part of this category are as follows:

Eye/Face Protection   Does the technician wear eye protection at all times when in areas requiring their use? Do they utilize face protection when performing tasks such as grinding, sanding, welding, under-vehicle work, etc. where safety glasses alone are not sufficient to provide protection from falling/flying materials?

Foot Protection   When handling parts/materials or working in areas requiring safety shoes does the technician wear appropriate foot protection?

Hand Protection   Does the technician wear appropriate hand protection whenever conditions exist that may create hand hazards; extreme temperatures, handling sharp/abrasive materials, working with chemicals and/or whenever force greater than fingertip pressure is required to install/remove any given component?

Hearing Protection   When working in areas where the noise level reaches a time weighted average of 85db or more, does the technician wear hearing protection with an appropriate noise reduction rating?

Body Protection   Does the technician take measures to reduce hazards that may result in injuries to parts of the body other than eyes/face, feet, hands and hearing? Example: Installing padding on protrusions that could be struck resulting in injury.

PPE	Eyes / Face Protection				
	Foot Protection				
	Fall Protection				
	Hand Protection				
	Hearing Protection				
	Body Protection				

>>   Work Procedures

The description of all critical behaviors to be evaluated as part of this category are as follows:

Training   Is the technician trained to perform the work required?

Lock Out/Tag Out   Are all sources of energy; electrical, hydraulic, pneumatic, potential energy, etc. locked out and stored energy discharged to prevent the unintended release which may result in injury? Has Lockout/Tag Out checklist has been completed?

Barricades/Warnings   Is there a potential for other personnel to unknowingly enter an area where hazards exist? Have warnings been posted and/or barricades erected to prevent injuries to other personnel?

Confined Space   Does the work involved require entry into spaces which:

1.   Contain or have the potential to contain a hazardous atmosphere; explosive, toxic, oxygen deficient, etc.

2.   Contain a material that has the potential for engulfing the entrant

3.   Has an internal configuration that might cause an entrant to be trapped or asphyxiated by inwardly converging walls or by a floor that slopes downward and tapers to a smaller cross section

4.   Contains any other recognized serious safety or health hazards

Hot Work   Does the work require the use of welding, cutting/grinding, brazing, etc.? Does the technician take precaution to prevent sparks and/or other hot materials from leaving the immediate area and have they removed all combustibles to prevent the start of fires? Is a fire extinguisher readily available?

Wheel Chocks   When working on "rolling equipment", does the technician place wheel chocks fore and aft of at least one wheel to prevent rolling?

Spotter   When moving vehicles in/out of service bays and/or other congested areas does the technician utilize a spotter to prevent accidents?

5S/Housekeeping   Does the technician take the time to "clean-as-they-go", put tools and equipment in their designated storage locations and ensure spills are cleaned up immediately to prevent accidents and promote a more efficient environment?

Working Alone   Will technician be working alone without direct and frequent contact with other personnel? Is job being performed in a remote location? Does technician have an effective means of communication when working alone in the event emergency assistance is necessary? Is there a process in place to ensure regular communications with working alone technicians to ensure they are okay? What plans are in place in the event the technician is out of touch beyond agreed upon check in times to ensure technician safety?

Work Procedures	Training				
	Working Alone				
	Lockout / Tagout				
	Barricades / Warnings				
	Confined Space				
	Hot Work				
	Place Wheel Chocks				
	Spotter				
	5S / Housekeeping				

>> JSA Checklist Completion

Technicians will complete the JSA prior to beginning a work order, when returning from breaks/lunch, and whenever conditions change that may create additional hazards. For each critical behavior listed above, the Technician will evaluate whether the behavior applies to the work to be done and will be noted as follows:

>> How to fill the JSA

Header Entries

Check whether JSA or JSA Audit and complete date, time, branch, RO# information. If JSA Audit — fill in auditor name and omit RO#.

Task Description ▶ Select task description that most closely describes work being done.

Critical Behavior Entries

N/A ▶ To be selected when Critical Behavior does not apply to task/job being performed.

1-L-2 ▶ When space is left blank this indicates that a hazard was identified during the initial assessment, 1 or 2 indicates hazard identified after first or second break and "L" indicates hazard identified after Lunch break.

Safe ▶ Check only when hazard applies to task/job being performed AND technician has taken steps to close or control hazard.

Risk Level ▶ Using the Risk Assessment Tool on page 2 of the JSA Checklist form determine the level of risk with job tasks related to the identified Critical Behavior(s). The letter corresponding to the severity in the At Risk column for the hazard is as followed:

- L for Low
- M for Medium
- H for High
- LT for Life Threatening. (see JSA Audit Checklist for a definition of these terms)

Closed or Controlled ▶ Check if able to close or control the hazard to prevent risk of injury.

If able to close or control a hazard describe how it was handled, if not then list reason and who is responsible for closure in the last column.

>> JSA Observational Audit

This is designed for managers, QuickServe Process Leaders, Operational Managers, Supervisors and/or others using the JSA Audit Checklist to conduct an observational audit. The objectives of this part of the JSA process are the following:

a. Observe the work and record safe and at risk work practices.

b. Provide feedback to Technician being observed regarding safe and at risk work practices.

Using the JSA Checklist form, audits will be conducted to provide feedback to technicians performing in job functions required to complete the JSA checklist and promote two-way communication regarding hazards identified as well as solutions/barriers to closing and controlling those hazards.

An audit is a "snap-shot" of the work being done and the conditions observed during the audit time period. Auditors will observe and note the hazards identified as they relate to the critical behaviours.

JSA Audit Feedback Session

Once complete, the observer will discuss the audit with the technician(s) observed. This time should be used to compare hazards identified by both the auditor and the technician and should be a constructive conversation to help the technician be more aware of any hazards they may have not considered. The auditor should also use this as a time to address any uncontrolled hazards to determine what is needed to ensure closure in the future.

Above all, the feedback session is NOT a time for disciplinary action. Rules violations must be addressed, however, no disciplinary action is to be taken for what is observed during the audit. Auditors are prohibited from identifying on the audit form, in any way, the name(s) of technician(s) being observed, this includes noting the work order number.

Audits will be performed primarily by branch management; however, other levels of technicians, QuickServe Champions, QuickServe Process Leaders or others may participate in the audit program as they are trained.

Audit Frequency

It is recommended to perform at least twice monthly on each technician within the groups utilizing the JSA program.

>> JSA Audit Data Collection

A significant benefit of the JSA Audit program is the ability to collect data from the audits for use in identifying critical behaviors that are being overlooked within distributor service operations. As audits are conducted, the auditors will send the completed forms to their HSE Leaders, so this information can be entered into the Safety Net database. From this data, reports will be generated to assist management in initiating the right steps for an incident free environment.

Just like any Key Performance Indicator, the important piece of generating this report is to act upon it. Understanding what is working and what is not, making the appropriate changes to ensure that our technicians are returning the same way they came in every day.

>> Tips on Driving a Safety Culture

We asked some of Cummins most effective leaders for thoughts about (Health and Safety Environment) HSE. This document reflects the advice they would share on how to build a culture of HSE within your teams.

Advice on Attitude

- Believe that every accident is preventable.

- Be bold on the importance of health and safety — it is our most important work. As the leader, you have a moral obligation to provide a healthy and safe work environment and processes.

- Believe that HSE has a direct effect on business performance such as profit and quality.

- Be aware that our work can be dangerous, but no one comes to work expecting to be injured by the work.

- There is something we should learn from every incident, no matter how minor — minor incidents are opportunities. Make a habit of observing from an HSE perspective.

Advice on Communication

- Talk about business goals in a specific order — safety, quality, delivery, and cost.

- Every meeting is an opportunity to talk about safety, every time you talk with any group:

  - Start every staff meeting talking about HSE.

  - Start all employee meetings with safety — but make it personal, not just the numbers.

  - Early in a new assignment, take the opportunity to let others know that HSE is important to you by talking about health and safety first and with the greatest length in your first meetings with leadership groups.

  - Be sure all reports know that you want to know about every incident, no matter how minor, so that you can follow up if necessary.

- Be ready to explain that our work can be dangerous and what we do to make it safe. We need to be realistic about this.

- When communicating after an incident has occurred, describe the following:

  - What happened?

- The background of affected employees;
- The impact of the incident — both personal and business;
- Actions taken to help the employee; and,
- Corrective actions.
- Really listen to concerns and suggestions from employees. Separate the emotion from the message.
- Ask questions about employees' personal safety concerns.

Advice on Leader Awareness

■ If responsible for a site or region, the leader needs to have at least general awareness of regulatory requirements and legal exposures/risks at the local and corporate levels.

■ The leader must be aware of site, region, and corporate policies and mandatory HSE procedures.

■ Know what types of HSE incidents must be reported, when they must be reported, and to whom.

■ Know your responsibilities under the applicable Emergency Response and Business Continuity Plans.

■ Read, study, and benchmark with others to bring new awareness for yourself, and apply the learning to the workplace.

■ Study fatalities and other incidents to understand how we can learn from what happened to prevent future incidents.

■ Know and understand the current safety performance for your area of responsibility. Understand how metrics are calculated and what they tell you.

■ If an incident has occurred, visit and understand the issue or issues.

■ Understand results of behavior-based safety (i.e. STOP, SALUTE, O-Tag, JSA, etc.).

■ Monitor monthly safety performance results.

■ Share experiences and/or best practices with other leaders.

■ Understand HSE audit results and actions to improve scores.

■ Know your site's significant hazards and risks and environmental aspect and impacts.

■ Know status of corporate, BU and regional HSE initiatives and progress against site's HSE goals.

Advice on Actions

■ Always know and follow the site's practices for safety such as:

- Site's safety procedures;
- Safety equipment to be worn (safety glasses, shoes, etc.);
- What to pay attention to; and,
- Site safety awareness video that everyone has to go through.

■ Ask these four questions (these are now part of the Major Injury/Dangerous Occurrence reporting process) to help you get to the root cause of each incident:

- Is there a process?
- Is the process capable?
- Have people been trained in the process?
- Are people following the process?

- Include safety in all audit or inspection processes, such as in layered process audits in the plants. Make this an important part of site leadership visits. Some key points to check are:

  - Housekeeping;
  - Segregation of vehicles from pedestrians;
  - Missing or damaged machine guarding;
  - LOTO application;
  - Personal protective equipment use;
  - Blocked exits or fire equipment; and,
  - Visibility of safety metrics on team boards, etc.

- Site leaders should walk ALL areas of the plant, shop, or warehouse daily, varying the time of day — you never know what you might learn.

- Make it a point to personally investigate every incident in your area of responsibility — meet the employee who was injured, inquire about the injury and how the employee is doing, and offer to make the employee part of the problem solving process.

- Pay close attention to corrective actions. Even as a senior leader, it is worthwhile to do this when visiting the site.

- When evaluating or considering a process, think about a loved one using the process or performing the task. Would you want your loved one to do it?

- Recognition for HSE is important:

  - Leaders need to participate.
  - It needs to include all shifts.
  - Don't forget to recognize at the personal level when appropriate.

- Staff the HSE positions with qualified people; don't leave these positions open. Regularly review continuous improvement plans with the HSE Leader, as you would do with quality or production leaders. Support and learn from the HSE Leader by walking the site with the HSE Leader regularly.

- Consistently take disciplinary actions for safety violations. Use your resources in HR/Legal to help with this.

- Never walk past a hazard or risk; a leader's actions speak as loudly as words. Stay there until you understand the situation. If necessary, shut a line or process down for safety violations.

- Be present during high risk times; for example, be there when major maintenance is taking place.

- Lead and actively participate in the HSE Committee.

- Learn how others have solved a similar problem by benchmarking or visiting a sister plant.

- Open your doors for visits or audits by others, as every observation is an opportunity. Reciprocate when you visit other sites.

Advice on Setting Expectations

- Make it clear to everyone that HSE is non-negotiable.

- Expect and encourage employees to report unsafe conditions and behaviors.

- Include HSE performance in on-track and start performance reviews with safety. Include objectives from senior leadership which can be cascaded down through the organization.

- Be sure expectations are addressed in performance planning if a staff is not establishing the right HSE culture or environment.

- Place accountability for HSE is at the appropriate place (ME's are designing the processes, shop floor leaders are seeing and responding to safety daily, etc.).

- Don't be too patient on HSE corrective actions. Review open HSE corrective actions regularly, and demand a sense of urgency for getting them closed.

- Have a documented, proactive HSE plan with key HSE initiatives for each AOP.

>> Final Thoughts

Remember that the purpose of doing a JSA before starting work is incident prevention. Technicians are more likely to complete a job without incident when they recognize job hazards prior to beginning their work, then complete the job by following the work practices and using the tools & equipment that will control the risks associated with those hazards. Your role along with the local and regional Management's role is to expect consistent use of this process and to verify its use. As mention early, your direct involvement on doing job observational audits is critical to drive credibility to this culture change. Job observations result in opportunities:

- To have a two way safety-only conversation with the technician to learn about the job hazards from the technician's perspective

- To see what's working and what isn't, and to track those trends;

- To reinforce safety standards & expectations;

- To drive change; and,

- To identify issues requiring training, new or different tools & equipment, unsafe work habits, work procedures that require modification, and unusual safety hazards requiring company-wide communications.

Safety is led by example and as leaders, we have to set the tone to live it as a personal value.

If you have any questions regarding the above material, please contact your regional QuickServe Champion, Local QuickServe Process Leader or HSE Leader at the regional or local level.

Live It. Lead It.

Tools and Resources Available

There are several tools and resources available for anyone involved in the QuickServe Process with the purpose of enhancing their skills as we aim to execute the process consistently everywhere and in every service event. While the target audience of this material was intended for QuickServe Champions and Distributor QuickServe Champions, everyone at the branch should have access to this information and is encouraged to use it.

There are two sources of information depending whether you are an independent, JV and company owned distributor:

- Cummins Connect: DBU_QuickServe Community for Dependent Distributors (Company Owned)
- Distribution Portal: QuickServe Every Time for Independent and JV Distributors

>> DBU QuickServe Community: Dependent Distributors (Company Owned)

For Dependent Distributors, Cummins Connect (DBU_QuickServe Community) is the source of information for all QuickServe related material:
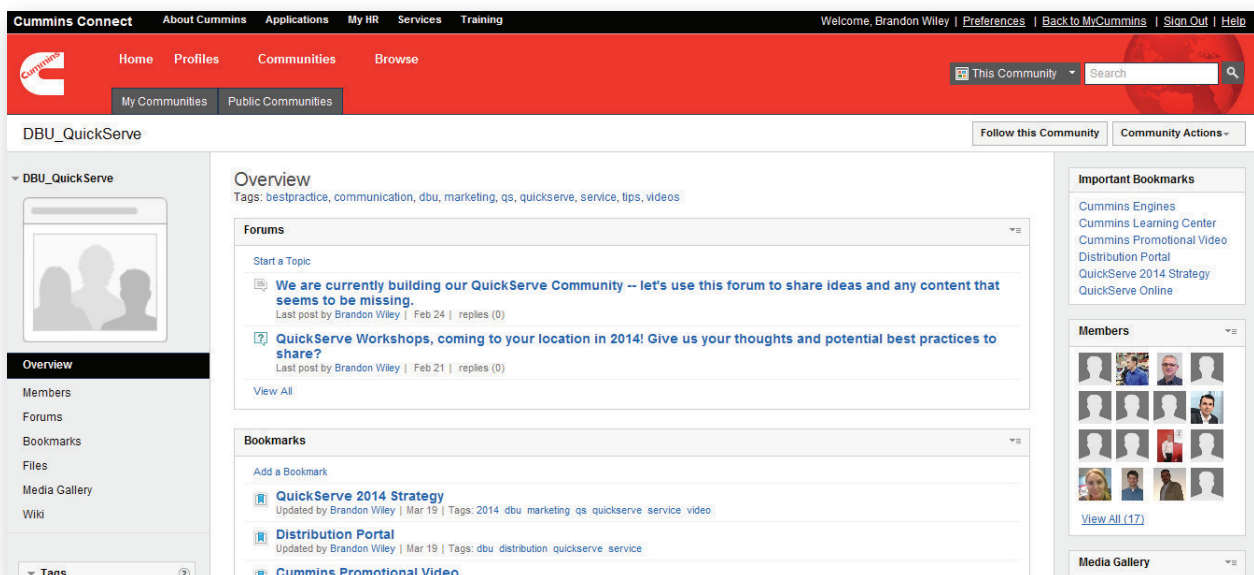
Figure 7.1 *Cummins Connect Screen Shot of DBU_QuickServe Community*

To get to this community, simply type DBU_QuickServe on the search field located on the top right hand corner of the screen and you will be directed to it.
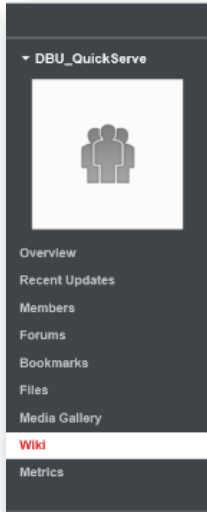
On the left hand side of the page, you will find the menu of topics related to the Community. A Wiki page was created to store all of the major pieces of information related to the QuickServe Process.

The Wiki contains the following information:
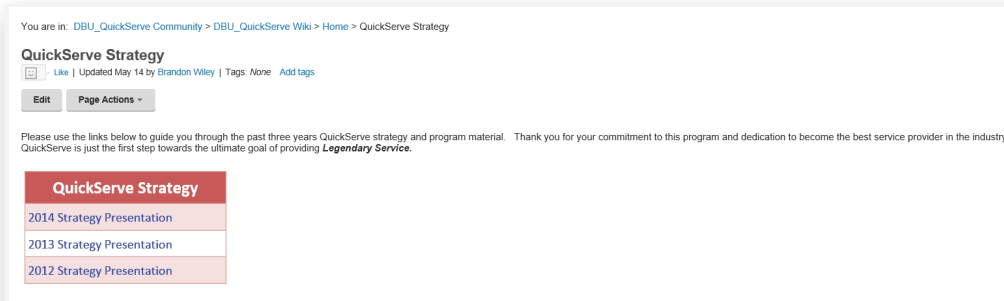
1. QuickServe Strategy
2. Program Reporting (to measure the maturity of the process)
3. Best Practices
4. QuickServe Learning Center
5. Marketing Materials
6. Translations (Translated Material Available)

QS Strategy	Program Reporting	Best Practices	QS Learning Center	Marketing Material	Translations

Welcome to the QuickServe page on Cummins Connect!

When you need service and support, at Cummins, Every Minute Counts.   Whether in the shop or in the field, Cummins has the technical expertise, factory support and experience to deliver fast, high-quality repairs using Genuine Cummins new and ReCon parts through our global standard QuickServe process.   QuickServe is a the global standard service process for everyone who turns to a Cummins distributor for timely and high-quality repairs.   The QuickServe process is designed to address all of our customers' unique requirements for InShop and Mobile service needs.

Getting repairs done right the first time is important to Cummins and our customers worldwide.   That is why QuickServe is available at over 600 certified Cummins distributor service locations in over 190+ countries worldwide.   Consistently executing the QuickServe process, provides our customers with complete confidence in the repair being made - regardless of the location or type of equipment being serviced.

Now, let's see what is behind each of the major themes of the QuickServe Community.

QuickServe Strategy
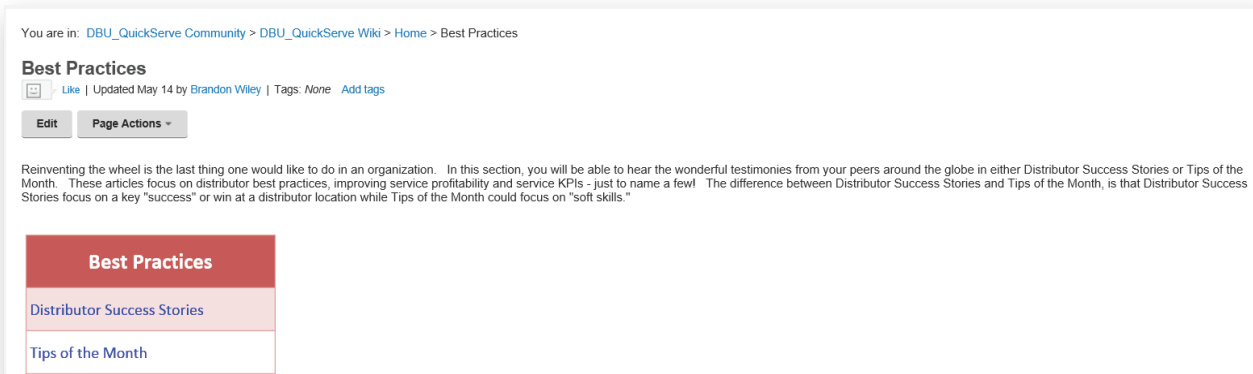
On this tab, you will be able to review the past and current strategy for QuickServe. These presentations provide the overall vision, mission, and tactics to accomplish process execution in a global consistent way.

Best Practices

In this section, you will have access to all of the Distributor Success Stories and Tips of the Month published since the launch of the QuickServe process in 2011. We have more than 30 pieces of information under this topic, and counting.

QuickServe Learning Center

In this section, you will find a direct link to the:

- QuickServe Process Training (located on the Cummins Learning Center)

- KPI Training Videos (which are ideal for tool box talks, staff meetings with service admin staff)

- Champion Training Material (relevant to new process leaders)

- Certification Training Material (includes student and instructor's manuals)

- Process Reference Guides for both 7 and 8 step process

- Conference Materials (from 2012 and 2014 global QuickServe workshops)

- Quarterly E-Zines (interactive magazines).

The QuickServe Process Training is a one hour online course that emphasizes the fundamentals of adhering to the QuickServe Process and illustrates the impact one employee can have on the entire customer service interaction. In this free training module, you play the role of both customer and a service employee in a service situation. By looking at a service interaction from both sides of the experience, you will gain a better understanding of customers' expectations and what you can do to provide excellent customer service. This course was translated and currently available in: Spanish, French, Portuguese, Arabic and Chinese.

As a reminder, this course is required for all Service Administrative employees to complete once every year.

An important source of information in this section is the KPI Training Videos. These short video segments are intended to help better understand the concepts of these metrics and reinforce the importance of monitoring and analyzing the results of each these service metrics. There are seven KPI Overview videos focusing on: Work-in-Progress (WIP), Paper-in-Process (PIP), Billing Efficiency, T/B Ratio, Labor Utilization, Productivity, and Absorption Rate.

Marketing Material

In the past, QuickServe was one of Cummins best kept secrets. Global business environments and increasing customer demands, mean it is now time to start differentiating ourselves by the service we provide.

QuickServe is the basic foundation for service (i.e. scheduling repairs, providing quotes, status updates); however becoming a differentiator requires a commitment in how we execute and deliver on the promises we make to the customer throughout the entire process. Thus in 2013, a full marketing campaign was developed to create one standard — global message on QuickServe. With Cummins moving from a Multi-National to a Global Corporation — having one standard global message is more critical than ever.

QuickServe promotional material was developed with the purpose to advertise the process benefits for our customers. This material was developed around the global tag line of: Every Minute Counts. Material collateral consists of External Flyers, External Posters (18" x 24"), a Promotional Video, Internal Posters, an InShop Banner (8'x4') and Standard Web Content.

As with the other information, the Wiki portion of the DBU QuickServe Community contains all of the above material for easy download. Below is an image of the Marketing Material content inside the QuickServe Community.

Marketing Material
Like | Updated May 14 by Brandon Wiley | Tags: *None*   Add tags

Edit   Page Actions ▾

The QuickServe Corporate Team is excited to announce the release of our new QuickServe Marketing collateral, which is available for download on the QuickServe Community on Cummins Connect and the Distribution Portal.   The new collateral is externally focused and promotes the benefits of the QuickServe service process to our customers.   QuickServe is a universal approach to service that provides our customers with:

- Personalized Service
- Fast Response & Diagnosis
- Precise Answers to Your Service Needs
- High Quality Repairs
- On-Going Communication

The marketing collateral was developed with a global tagline of **Every Minute Counts** and consists of:

1. External Flyers
2. External Posters
3. Promotional Video
4. Internal Posters
5. InShop Banner
6. Web Content

This material has been translated into: **Arabic, Chinese, French, Spanish, and Portuguese** and is available on our Translations page on Cummins Connect.   The marketing collateral is available in the following market applications: On & Off Highway, PowerGen, Construction, Marine, Oil & Gas, Agriculture, Bus, and Rail.

As the QuickServe Corporate Team standardizes the messaging and communication elements of QuickServe around the globe, we ask that distributors' who need the art work or Adobe files for local printing purposes to coordinate with Brandon Wiley (Brandon.wiley@cummins.com).   Additionally, we encourage all of our global distributors to update and use the new marketing collateral to promote the QuickServe process both internally and externally.

The marketing collateral is currently available in the following market applications: On & Off Highway, PowerGen, Construction, Marine, Oil & Gas, Agriculture, Bus, and Rail. Additionally, the material has been translated into: Arabic, French, Chinese, Spanish and Portuguese.

As the QuickServe Corporate Team standardizes the messaging and communication elements around the globe, we ask that distributors who need the "art work" for local printing purposes to coordinate with any member of the QuickServe Corporate Team.

It is worth it to mention that the Corporate Team is open to allow distributors to regionalize the pictures to applications more traditional to your region or markets that you support. If you decide to do so, contact any member of the QuickServe Corporate Team and they will explain the process and requirements to modify the collateral.

We encourage our entire distribution network to update and use the new marketing material and promote the QuickServe process to our customers. This marketing material is ideal for customer waiting areas or regional trade shows as they focused on what customers will experience out of the QuickServe process.

External Flyer

The example external flyer should be included in any customer events/meetings or distributor trade shows. It is a two sided pamphlet promoting QuickServe and the five key elements relevant to our customers. Again, this material has been translated and is available selected market applications.
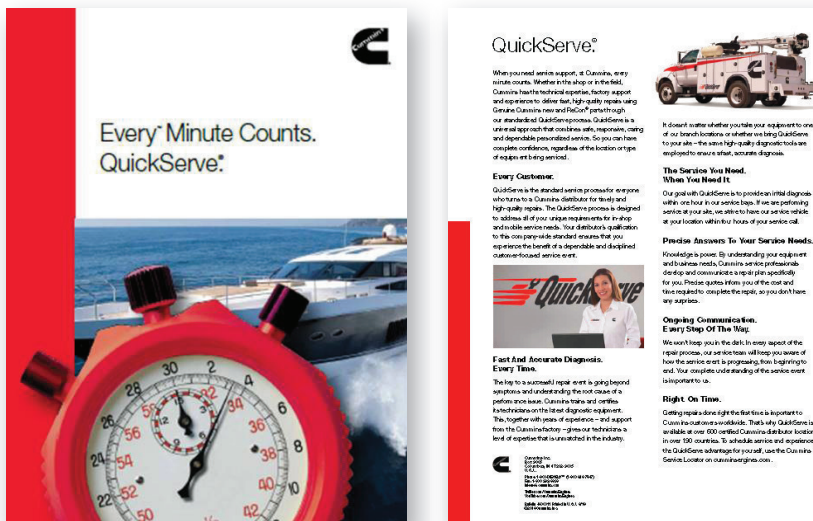
Promotional Video

The promotional video was created to promote the benefits of the QuickServe Process from the customer's perspective. The video touches on the five major attributes of the process:

1. Personalized Service
2. Fast Response and Diagnosis
3. Precise Answers to Your Service Needs
4. High Quality Repairs
5. Ongoing Communications

The video has subtitles in Spanish, Portuguese, French and Arabic languages.

Promoting the Process Internally

There are internal posters available intended to engage the branch staff around the importance of the QuickServe Process and the impact of each individual role in the success of this program. The material should be displayed inside offices to remind everyone of the seven and eight process steps.
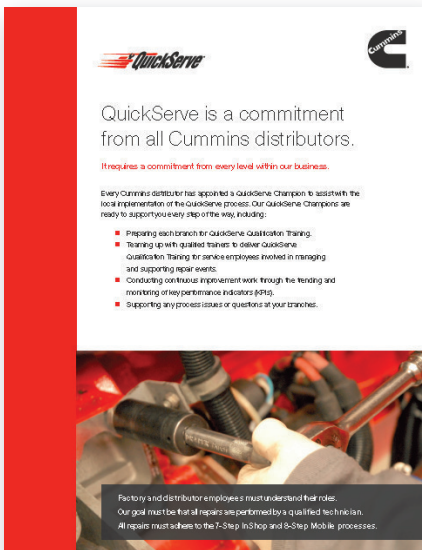
Cummins Western Canada QuickServe Internal Process Video

Cummins Western Canada developed an award winning video that focuses on the InShop QuickServe Process. This internal training video was developed to both inspire and reinforce the importance of the QuickServe Process; which, if executed correctly — provides our customers with an excellent customer experience. You can find this video as part of the material found in the Wiki.
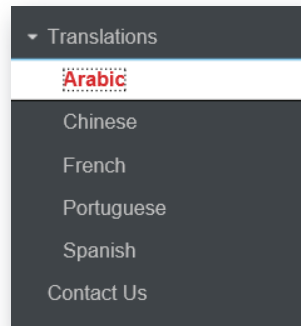
Other Translations

We have translated key publications into five different languages: Spanish, French, Portuguese, Arabic and Chinese. The menu of languages is found on the left side of the QuickServe Community page. On the Translation section, you can select the language and see what material has been translated to that language.

Let's take Arabic as an example. By clicking on Arabic link we will find what material has been translated into that language.

Contact any member of the QuickServe Corporate Team if you require a specific piece of information found in the community that is not currently translated to your language.

>> QuickServe Every Time Distribution Portal: Independent Distributors and Joint Ventures

The same content displayed in the QuickServe Community can be found on the Cummins Distributor Portal (distribution.cummins.com). If you don't have access to the page, you can request access by clicking "Request Access" on the top right hand corner of the main page of the Distribution Portal.
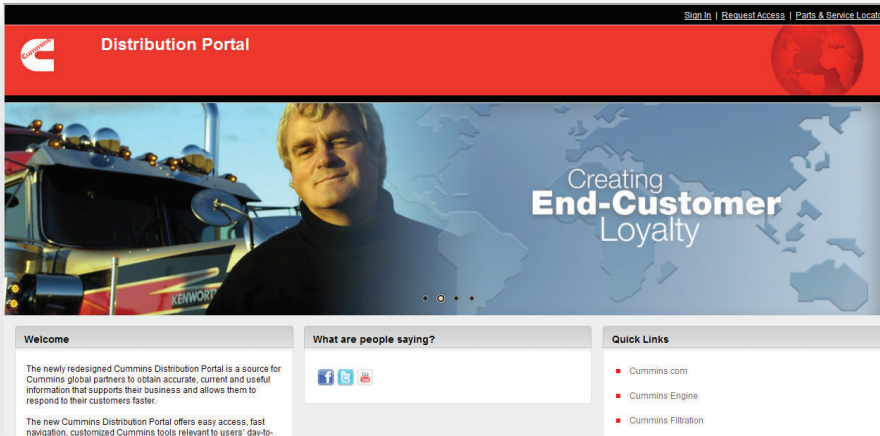
Upon log in, you will see a series of windows referencing different kinds of information. One of those windows is titled "QuickServe Every Time".
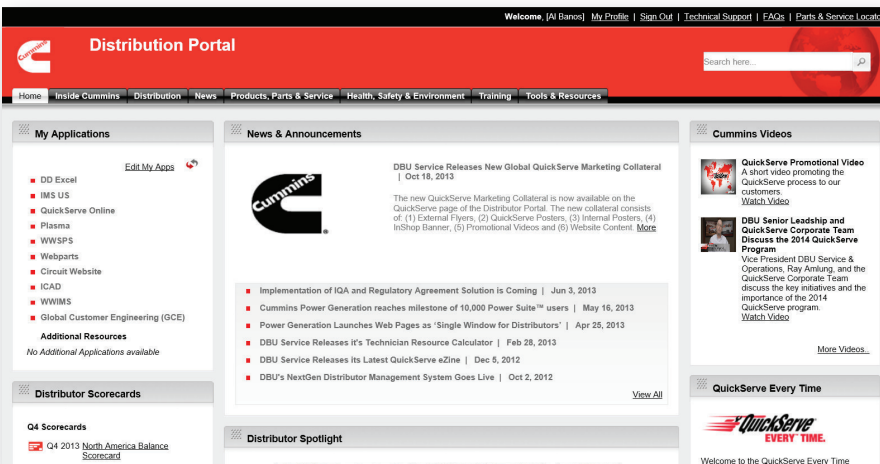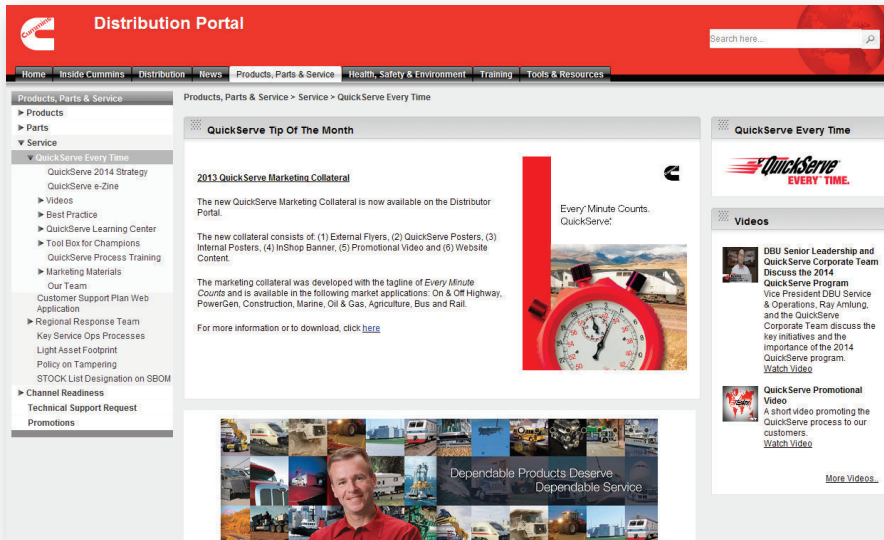
When you select the QuickServe Every Time window, you will find on the left hand side of the screen, a menu of the same information available at the Community.

The QuickServe Corporate team will continue to support both sources of information until there is another alternative source of information available for this important group of distributors.

>> Final Comments

Appendix E has a quick reference guide of the main tools available at both sources of information described on this chapter.

Online Training and QuickServe Qualification

>> Online QuickServe Training Course

In order to be successful at the execution of the QuickServe Process at a branch level, it is important for everyone at the branch (regardless of their function) to understand the fundamentals of how the process works and the impact to the customer. A one-hour, fully interactive and free of charge course was developed with that purposed in mind. The course title is: Cummins QuickServe Process Basics Course (course number: 9113) and it is available at the Cummins Learning Center (www.learn.cummins.com).

To access the course, follow these simple steps:
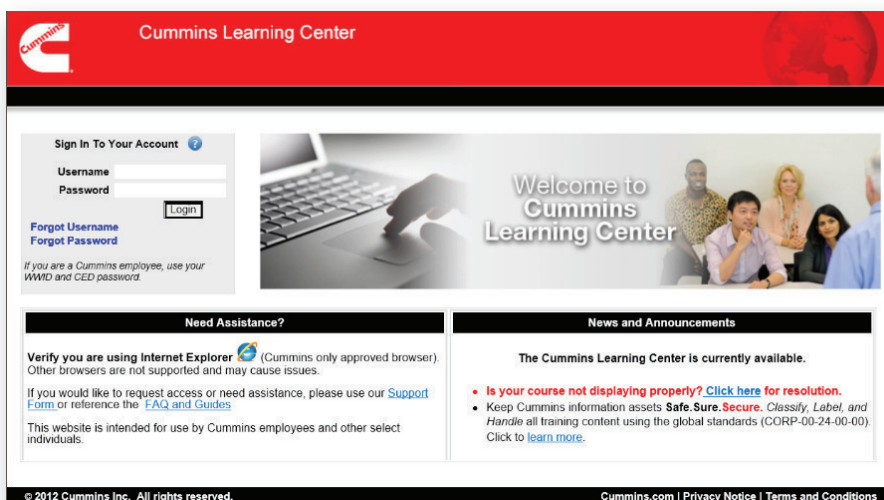
1. Go to Cummins Learning Center's (CLC) website.
2. If you have access to the CLC, log-in.
3. If you do not have access to the CLC, click the "New Access Request" link in the upper right hand corner.
4. Fill in the appropriate information to gain access. Once logged-in to the CLC, search for "QuickServe" in the search menu.
5. The course will appear and click "Launch" to begin.
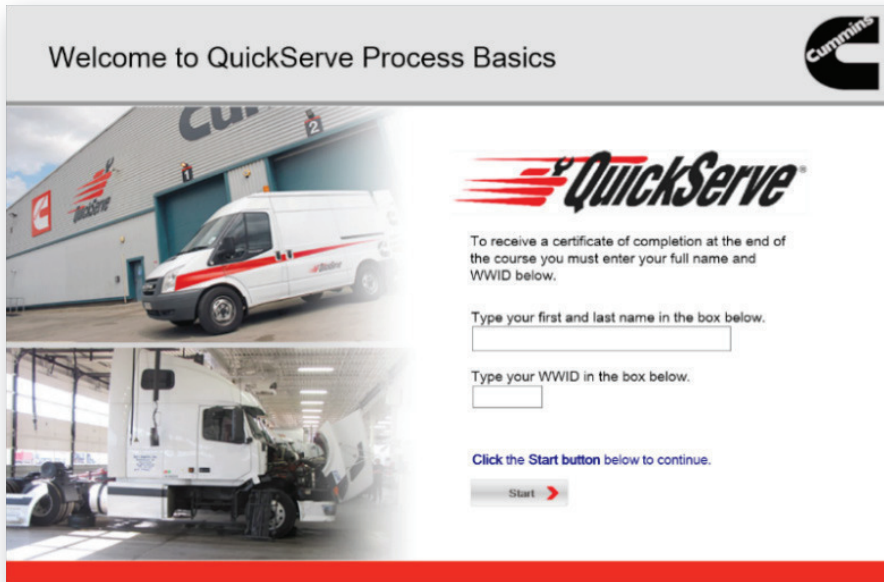
This online course covers the fundamentals of how to execute the QuickServe Process and the impact one individual can have on the entire customer service interaction, especially in key service roles such as Branch Managers, Service Supervisor, Service Advisor/Writer, Parts Professionals and Technicians. This online training module does not replace the QuickServe qualification classroom training currently in place; but, it is a pre-requisite to attend the qualification class or can be used as a supplemental resource to re-train or teach the basic process steps to new employees awaiting for a qualification session to become available.

This course is divided into 4 different modules, which are:

1. Learning the Process
2. Get the Facts
3. Communicate the Plan
4. Making it Right.
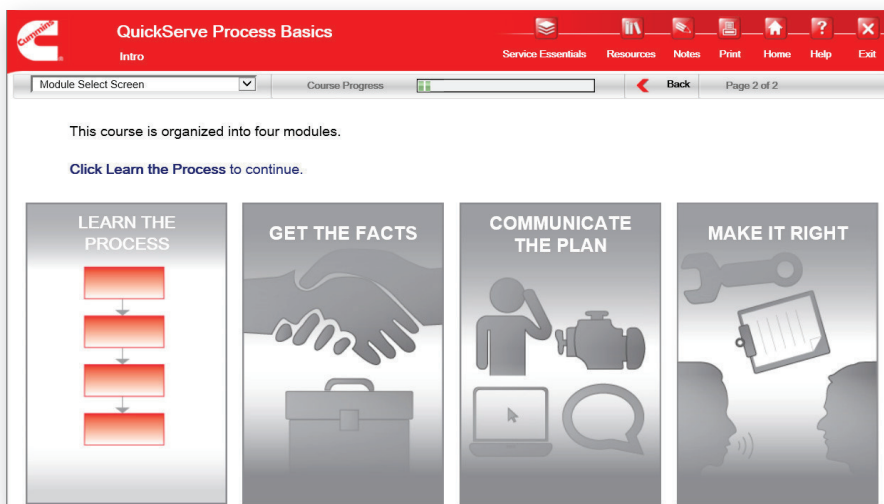
Each module explores specific steps of the QuickServe Process — while providing interactive resources that helps to understand the fundamentals of the process and how the customer benefits from it.

QuickServe is a proven process that provide customers with a positive service experience. In this course, the trainee will have the opportunity to play the role of both a customer and a service employee in a service situation. By looking at a service interaction from both sides of the experience, the trainee will gain a better idea as to what customers come to expect and what the trainee can do to provide an excellent customer service experience. The results of the customer facing exercises can be printed, which allows service supervisors to coach their employees to improve their skills in the areas of customer interaction.

It is highly recommended to have the branch staff take this course on a yearly basis as a quick refresher of the QuickServe Process so everyone understands their role in supporting the execution of the process. For key service roles such as: Branch Manager, Service Advisors/Writers, Parts Professionals dedicated to service and Shop Foreman this online course is mandatory. Also, any new hire in the service side of the distributor business must complete this training as part of his/her onboarding process. Again, this training does not replace the 3 day QuickServe Certification, but provides a general guideline on how the process works. Finally, any individual scheduled to take the full qualification, is required to complete this online training as part of the pre-requisites for the certification course.

In order to better track this training requirement for key Service roles at a branch, personnel who had previously been QuickServe Qualified (3 day classroom) and have taken the QuickServe Process Basics (CVC courses 9001-9024), will go from green to yellow in Promotion at the beginning of every year until they retake the e-learning course 9113. Once they take this e-learning course, they will be fully green in Promotion. This course is very easy to take and will keep everyone refreshed on the key elements of the QuickServe Process. Please refer to Appendix F that describes the instructions on how to re-register for this course.

Your Functional Excellence Regional Service Leader will receive a report of all the people who have taken the online course to ensure that branches are 100% in compliance with this requirement. Feel free to reach out to your Functional Excellence Regional Service Leader if you would like to get a copy for your distributor completion report.

>> QuickServe Qualification

It is Corporate's requirement for any branch to have the following service staff certified in the QuickServe Process:

- Service Supervisors
- Service Advisors and/or Writers
- Parts Professionals dedicated to Service
- Shop Foremen

The QuickServe Qualification Course is a three day instructor led course that explains the details involved in each of the steps in the QuickServe Process. Part of the training material includes exercises in soft skills and tools involved in each of the 7 and 8 steps of the process. This training is very interactive and offers a great opportunity for participants to ask questions and get a full understanding of their role and responsibilities to execute the process with a team work approach in a consistent way.

The QuickServe Qualification curriculum is taught by day in the following manner:

Day 1
Program Introduction
Module 1   Introduction
Module 2   QuickServe Process
Module 3   Greet the Customer
Module 4   Staging the Repair (Mobile Only)
Presentation Assignments / Study Guide
Day 2
Module 5   Diagnosing the Equipment
Module 6   Developing the Quote/Repair Plan
Module 7   Communicating the Quote
Module 8   Carrying Out the Repair
Module 9   Invoicing
Module 10   Final Customer Communication
Module 11   Performance Monitoring
Day 3
Training Review
Written Qualification
Hands on Qualification Test
Student Presentation Delivery and Feedback

As part of the QuickServe Qualifications Pre-Requisite, all participants are required to take the QuickServe Process Basics located at the Cummins Learning Center, e-Learning Course 9113.

QuickServe Process Basics:
e-Learning Course 9113

This 1-hour online course emphasizes the fundamentals of adhering to the QuickServe process and the impact one employee can have on the entire customer service interaction. This course has been translated and is currently available in: Spanish, French, Portuguese, Arabic and Chinese.

Click here to access.

This e-Learning Course has replaced the old CVC's courses. Therefore, new employees being QuickServe qualified will only need to take the following courses:

US AND CANADA: QUICKSERVE PROCESS QUALIFICATION PROMOTION ID: 2007-25Q

These are the courses needed to obtain full qualification:

- 9074 (QuickServe Process Written Assessment)

- 9075 (Process Skill Assessment)

- 9113 (e-Learning Course) replaces old CVC pre-requisites (9001 - 9024)

INTERNATIONAL: QUICKSERVE PROCESS QUALIFICATION PROMOTION ID: 2008-01Q

These are the courses needed to obtain full qualification:

- 9100 (QuickServe Process International Written Test)

- 9101 (QuickServe Process International Skill Assessment)

- 9113 (e-Learning Course) replaces old CVC pre-requisites (9001 - 9024)

Every QuickServe Regional Champion and/or Functional Excellence Regional Service Leaders have access to the training material to conduct the course. If those individuals do not have the training material, contact the DBU Service Team to get digital copies of the material.

Measuring the Performance of the Process

The Capability Maturity Model (CMM) is being used by DBU to track the maturity of the QuickServe Process. This CMM is a standard industry model which defines the maturity of any given process within an organization.

This model consists of five stages:

1. Initial
2. Repeatable
3. Defined
4. Managed
5. Optimized
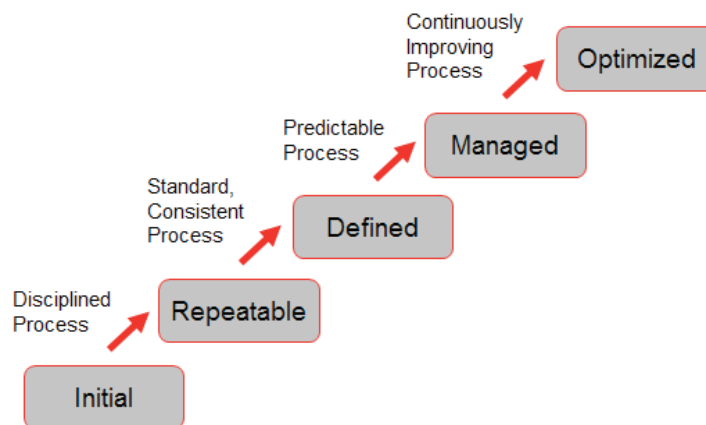
Every Regional and Distributor QuickServe Champion needs to monitor that the process is evolving from initial deployment all the way to optimization. There are several checks and balances in place to measure the maturity of the QuickServe Process, but one of the most effective ways is the use of the QuickServe Process Web Audit Tool.

>> QuickServe Process Web Audit Tool

The QuickServe Process Web Audit Tool provides multiple tools in one location:

- Scheduling QuickServe Audits
- Performing QuickServe Audits
- Viewing QuickServe Audit Action Plans
- KPI Data Entry (Only outside North America)
- Reporting

This online system provides a centralized location for audit data, and provides the ability for further analysis of audit information. This analysis can be done not only between audits of the same branch, but between branches of a distributor. It also provides a consistent audit measurement system, ensuring all locations globally use the same audit.

Monthly management reports are generated using the information in this tool, so the accuracy of the data is very important.

The QuickServe Online Process Tool is accessible from two sources depending on type of Cummins association:

- Independent and JVs can find the tool at the Distribution Portal
- Company Owned Entities can find the tool at Cummins Connect

The direct link to the tool is: http://quickserveprocesstool.adayana.net.
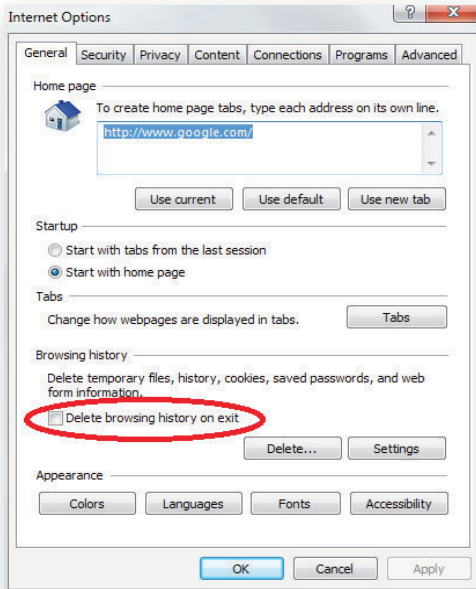
Important Note: Internet Requirements and Browser Options

The Cummins QuickServe Process Tool requires Internet Explorer version 10 or better, Google Chrome, or Firefox.
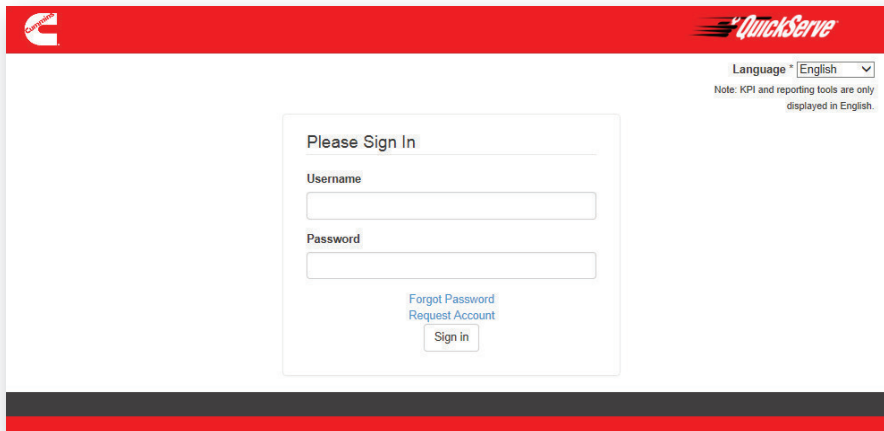
The audit portion of the tool automatically stores the audit in the temporary files of the internet browser, until the audit is submitted. For this reason, it is very important that the internet browser settings are not set to automatically delete temporary files, history, cookies and web information upon exit.

If browsing history is deleted, all audit data performed but not successfully submitted will be lost.

It is a good idea to regularly check this setting before beginning an audit, to ensure the setting hasn't changed.

If you are a new user and need access, please send us your name, WWID, Job Title, Distributor and the branch names of which you need to have access to distribution.quickserve@cummins.com.

>> Navigating the Tool
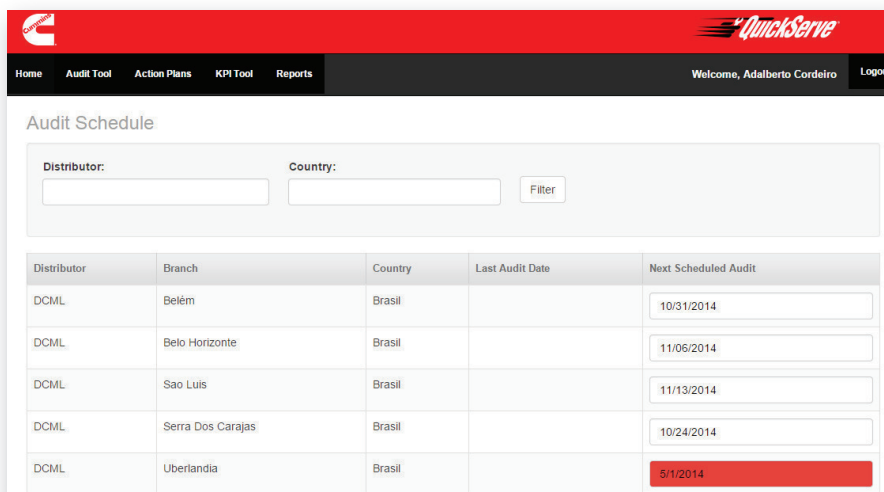

You will sign into the QuickServe Process Web Audit Tool by using your WWID.

The default language is English. If you wish to see the Audit Tool portion of this site in either Portuguese or Spanish, select the language before logging in.

Scheduling Audits

The Home page displays all branches and the Next Scheduled Audit Date for all locations available to the user. It is important that the Next Scheduled Audit Date is accurate, as this information is used to report Audit Schedule Progress. Audits that are past due are shown in red and are reported as late.

The screen can be sorted by clicking on the column headers.

The Next Scheduled Audit Date can be modified, and should be scheduled using this feature. This will be a quick reminder of upcoming scheduled audits. The Branch and Service Managers will also see the dates for their branch when they log in. The Functional Excellence Service Leader will have visibility to all branches and can quickly see who has an audit past due.

As audits are completed, the Next Scheduled Audit date is automatically populated with the next date (12 months later for scores 85% and above; 6 months later for scores less than 85%).

QuickServe Playbook

Performing Audits

To perform an audit, click the Audit Tool label on the black ribbon, which brings you to this page with three choices:

1. Launch New Audit Wizard
2. Resume Incomplete Audit
3. Import Audit from File

Note: Resume Incomplete Audit is to resume an audit that you started. The system is not designed to allow you to finish an audit that someone else started on a different computer.
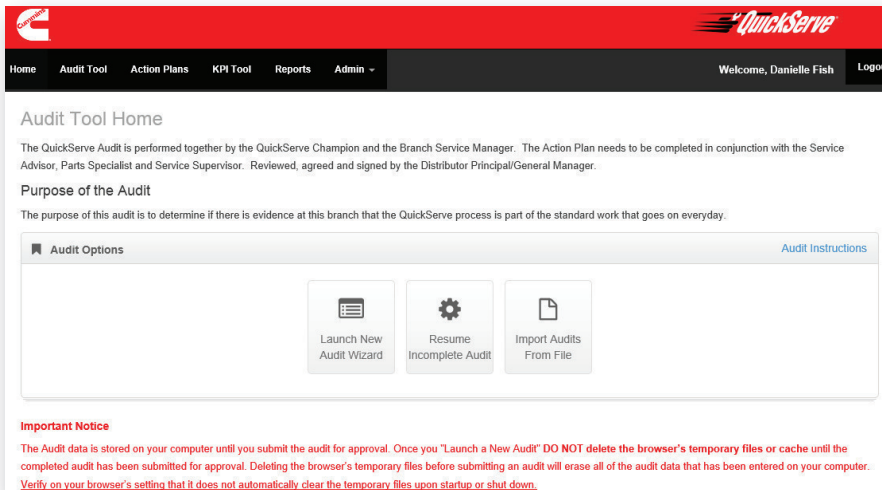
The web audit tool presents the auditor with the audit criteria in a user friendly format. Performing an audit regularly at each branch provides a consistent measurement of the QuickServe Process. The QuickServe Process is measured by reviewing multiple areas:

- QuickServe Customer Meter Data
- Tech to Admin Ratio
- Observational Audit
- Branch Level Audit
- InShop Work Orders
- InShop Summary
- Mobile Work Orders
- Mobile Summary

As a Distributor QuickServe Process Leaders, Branch Manager or Service Manager, you can access and audit all of the branches under your Distributor. The default type is a Self-Audit, the same type of audit you have been performing for the past few years.

Once you have set the branch that is being audited, click BEGIN AUDIT.

Enter the names and titles of the others participating in the audit. When you are ready to proceed, click NEXT.

Note: At any point during the audit, you may click Save Changes and Close the audit. When you are ready to continue with the audit, simply click on Resume Incomplete Audit after you log in and select Audit Tool.

Preliminary Questions

The Preliminary Questions screen contains questions that prepares the criteria to be evaluated during the audit process. The answers to these questions will set the stage for the rest of the audit. The answers to the five questions are required before moving forward.

Each question is answered by either a Yes or No. Each Yes answer will result in question(s) related to that topic being presented during the audit.

For example, if EDS is not implemented in the location being audited, the EDS question is not asked and the associated points are not included in the audit.

When the NPS question is answered Yes, additional information is requested on this page.

Locations that have NPS implemented are asked to go into Allegiance to obtain information on the QuickServe Customer Meter questions.

The purpose for pulling QuickServe Customer Meter data from the last audit date to present and entering the information into the Audit Tool is to allow analysis between the Customer Meter data, at the question level, and the information from the audit. The capability to pull reports to include Customer Meter data and audit data will be available in the future with the reports implementation.

The data entered here, found in Allegiance, will be scored and shown on the Action Plan later.

Sample Size Calculator

Enter the number of customer billable work orders processed by the branch in the last 3 months, separating InShop and Mobile.

Do not include planned maintenance, internal jobs and scheduled rebuilds.

The maximum number of work orders the calculator will suggest is 30 work orders, each for InShop and Mobile. This minimum of 30 work orders is the suggested sample size in order for the audit to be statistically valid.

Tech to Admin Ratio

The Tech to Admin Ratio calculator allows the auditor to calculate the ratio between technicians and service administrative people. The Service Administrative people who is part of this calculation is defined as anyone who is directly involved in the management of technicians, work orders and customers.

While there is not a score associated with the calculated ratio, this information will help to further assess the branch as it complements the overall audit results. In general terms, a high tech to admin ratio (anywhere greater than 3.5 or 4) will have negative effects in areas such as communication with the customer, PIP, WIP, Tech Efficiency, Billing Efficiency, among other metrics.

Additional information about each role is available by hovering the mouse over the underlined role.

Observational Audit

The Observational Audit was the result of a best practice from one of our distributors in North America. This portion of the audit can be used as a preliminary assessment of the branch. It is highly recommended to take the time to use this portion of the audit to observe a take notes about service events happening in real time. While there is no points associated with any of the criteria in this portion of the audit, the results can be used to enrich the overall audit results during the sharing of results and elaboration of the branch audit plan. The Observational Audit portion is still optional. It can be skipped by clicking the Next button.

Branch Level Criteria

The purpose of this portion of the audit is to evaluate whether the basic structure is in place to execute the QuickServe Process. For example, some of the criteria ask for key roles to be in place, such as Service Advisor, Service Supervisor and Parts Specialist. You can hover over the "?" icon to find a description of each of these roles.

Note: Each No or N/A response on this page requires an explanation in the Observations / Comment box associated with the criteria.

InShop Work Order Entry

The InShop Work Orders page is only displayed if InShop services are performed at the location.

Click the Add New button to add a work order. Enter each work order and respond to each criteria using the drop down boxes. The boxes for the Service Advisor, Supervisor and Technician will provide auto-fill names when you enter the first letter of a name you've already entered previously on the current audit.

Each N/A response will require a comment, to share why the particular criteria is not applicable.

Some criteria that receive a No response will also require a comment.

There are two fields for each work order that are not scored:

1. The Product offers a drop down list of products that was supplied from WWSPS. Select the product that the work order applied to.

2. Service Market is also selected from a drop down list.

These two fields provide additional analytical insight by pulling reports to determine which specific markets and products was a technician not qualified so the evaluator and the branch can product training gaps.

You can go back and amend a previously completed work order by clicking the work order you want to review. Then scroll down to make the changes and save the work order.

When you are done entering InShop Work orders, select NEXT at the bottom of the screen.

InShop Summary Page

The Summary page shows the number of work orders reviewed, the number of Yes responses and the score by criteria.

Each Yellow and Red score requires a comment. The comments entered on this Summary Page will later be automatically included on the Action Plan.

The purpose of the comments are to share your observations as to why the lower score, a common theme to the No responses or additional information that will help the evaluator and the branch develop the Action Plan.

Mobile Work Order Entry

The Mobile Work Orders page is only displayed if Mobile services are performed at the location. The same process is repeated with Mobile Work Orders, as previously shown above for InShop, with a few Mobile only criteria.

Mobile Summary Page

There is a Mobile Work Orders Summary page as well. The same dynamics apply in terms of filling the observations/comments fields to get ready to develop the action plan.

Once you have entered all of the work orders for this audit, from the Summary page click NEXT. You will receive a pop up box saying you will not be able to go back.

Once you get to the Action Plan, you are not able to go back to make changes to the audit. That is the purpose of the warning message. So, be sure all of the data is complete and accurate. Data cannot be change once you click OK.

Action Plan

The Action Plan is separated into the Branch Level, InShop and Mobile sections. The criteria scoring is displayed here. Each Yellow and Red score require an Action Plan component, Person Responsible and a Completion Date.

The comments made on the Branch Level, InShop Summary and Mobile Summary pages are included on the Action Plan automatically. The Action Plan is the most critical step during this process, so make sure to get key stakeholders at the distributor branch to get agreement and consensus on what needs to be done to ensure execution on closing identified gaps.

If you click Submit Audit and have not completed the required Action Plan Components, Person Responsible or Completion Date, an error box will tell you to fill out all of the required comments. The boxes that need to be completed will be highlighted in red.

Audit Score

Once all of the required Action Plan items are completed, and you click SUBMIT AUDIT again, you will then see your audit score. Do not focus on the score, but focus on what needs to be done to properly execute the QuickServe process.

The approval process for the audit cycle to be completed, requires the auditor to enter in the email address of the final Action Plan approver, VP of Operations, General Manager, Principal, etc. This person will receive an email with a link to the approve / reject page. Once the approver approves the Action plan, the auditor will receive an email indicating that the audit is now complete and approved. If the approver rejects the Action Plan, the approver is expected to discuss the required changes to the plan. In the mail the auditor receives notifying him/her of the rejected plan, there will be a link to be used to modify the Action Plan.

Upon submission, a courtesy email is also sent to the Branch Manager and the Functional Excellence Service Leader, letting them know an audit was performed and the Action Plan is pending approval.
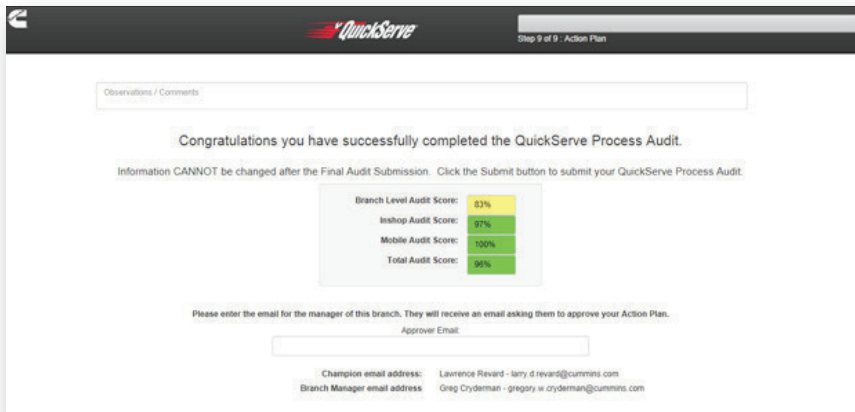
Action Plan Approval / Rejection Page
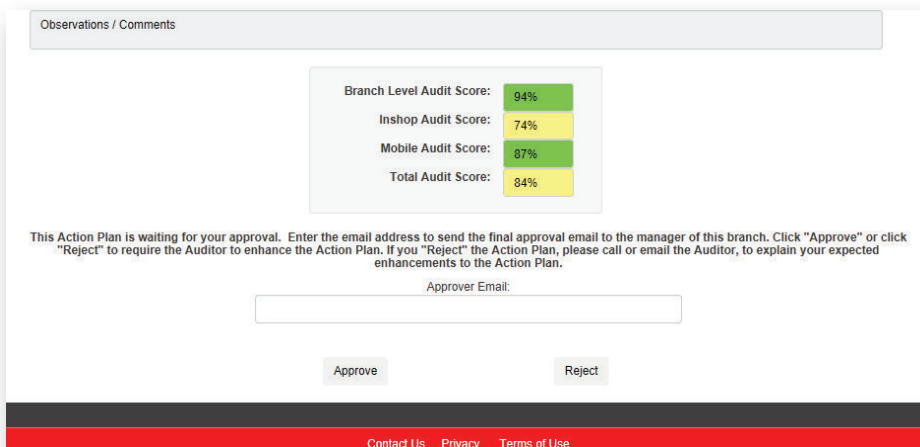
The recipient sees the entire Action Plan, reviews the plan, scores, etc. (the picture shown here is the bottom of the Action Plan). They do not see the individual work orders as part of the review link. The entire audit information will be available in the reports capability.

The final approver clicks Approve or Reject.

Upon "Approve" — the audit is marked as complete. The evaluator and Branch Manager receive an email notifying them that the Action Plan has been approved and they can now begin implementing the changes identified in the Action Plan.

Upon "Reject" — the audit is marked as rejected. The Distributor QuickServe Process Leader and Branch Manager receive an email notifying them that the Action Plan has been rejected. The person that rejected the Action Plan is expected to communicate directly with the auditor, so the appropriate changes can be made to the Action Plan. The Auditor then uses the link in the email to modify the Action Plan and resubmit for approval.

Branch or Service Manager Performed Audit

If a Branch or Service Manager performs an audit, the approval email is automatically sent to the branch distributor headquarters. The Distributor QuickServe Process Leader is required to review the audit. The Distributor QuickServe Process Leader receives an email with an approval link. The QuickServe Process Leader sees the entire Action Plan, reviews the plan, scores, etc. (the picture shown here is the bottom of the Action Plan). They do not see the individual work orders as part of the review link. The entire audit information is available in the reports section of the tool.

The final approver clicks Approve or Reject.

If they approve the Action Plan, the QuickServe Process Leader then types in the final approver's email address. The final approver then is required to click the link on the email and approve the Action Plan to complete the audit approval process. The recipient sees the entire Action Plan, reviews the plan, scores, etc. They do not see the individual work orders as part of the review link.

If the Distributor QuickServe Process Leader rejects the Action Plan, the Distributor QuickServe Process Leader is expected to communicate directly with the auditor to let them know the expected changes required in the Action Plan. Upon rejection, an email containing a link to modify the Action Plan is sent back to the auditor. The auditor is expected to use that link to make the necessary changes to the Action Plan and resubmit it for approval.

Viewing Action Plans and Audit Status

Submitted audits can be viewed on the Action Plans tab. Clicking the View Action Plan link will review the Action Plan. This is a View Only page of the Action Plan, please note that no changes can be made.

On the view of the Action Plan, you can print a copy of the Action Plan.

There is a detailed User's Guide, available in the Appendix.

Audit Tool Export and Import Feature
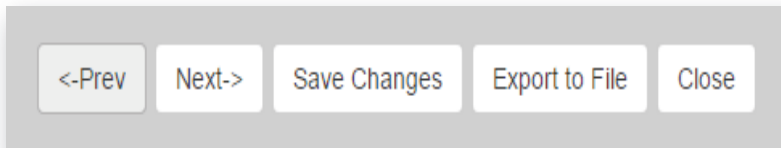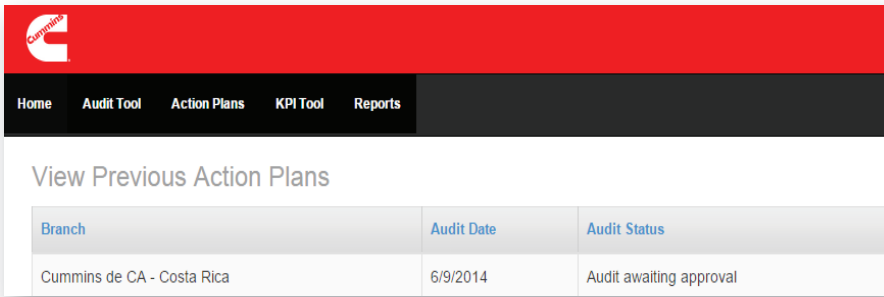
The audit may take multiple days to complete. For this reason, it is wise to use the "Export to File" feature as a secondary backup of the audit work you've performed. As stated before, the audit is saved automatically in the internet browser temporary files, when Save Changes is selected. However, using the "Export to File" option, at the end of each day, is a good practice. Think of this feature as a secondary backup, in the event the browser files were accidentally purged. This feature can be selected from any page of the Audit Tool portion of the system.
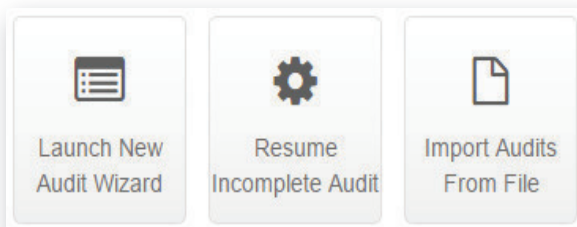
An audit previously begun can be resumed using the "Resume Incomplete Audits" button. In the event that no audits display using this button, then the "Import Audits from File" button will import the file you exported as a secondary backup.

Viewing Action Plans

The action plans of completed audits can be reviewed on the Action Plans tab. No changes can be made to the Action Plans, this is for view only. Only locations the user has access to can be viewed.

Action Plans can also be viewed and exported in a report format using the Reports section, discussed later in this section.

KPI Data Entry

The KPI portion of the QuickServe Process Web Tool is where all KPI data is reported monthly. The tracking of KPIs and entering the data into the KPI Tool portion of the system is important for reporting and analysis. All regions, except the US and Canada region, enter KPI data into this system each month. It is the responsibility of each Distributor QuickServe Process Leader to ensure that all KPI data for monthly reporting is complete and accurate. The data must be entered by the 12th of each month. This date is important, as reports are generated on the 15th of each month.

The following data is entered into the tool for International locations:

- QS Customer Meter Total Yes
- QS Customer Meter Total Questions
- Meets Expectations Total Yes
- Meets Expectations Total Questions
- NPS (Service)
- # Repairs <= 3 Days
- # Repairs > 5 Days
- Total # of Work Orders

- Available Hours
- LU Applied Hours
- BE Applied Hours
- Billed Hours
- Total Hours
- Work In Process (Days)
- Paper In Process (Hours)

The following KPI data is calculated:

- Labor Utilization
- Billing Efficiency
- Total / Billed Ratio
- Meets Expectations Score (also called RTCM)

- Productivity
- In-Spec RECT
- QS Customer Meter Score

Definitions for each of the data entry points are available in the tool.   When the pointer is hovered over each of the underlined terms on the page and it will display a pop up box that further explains the KPI.

Available Hours			
LU Applied Hours	BE Applied Hours		
BE Applied Hours	Definition		
Billed Hours	Hours worked on productive jobs (including internally billed) that have been invoiced.		
Total Hours			
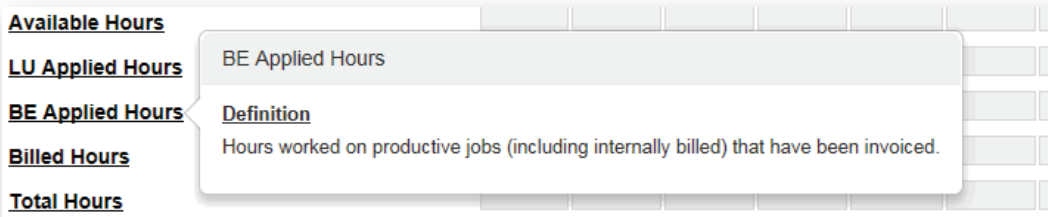
>> Reports Available

Distributor QuickServe Process Leaders and Regional ABO/RDO Champions benefit from the reporting capabilities of the tool as they can analyze trends, make comparisons between branches, monitor branch performance over time, as well as utilize several other reports. The type of reports that are available to the user will depend on user access. Reports that are available will be shown in the drop down list.
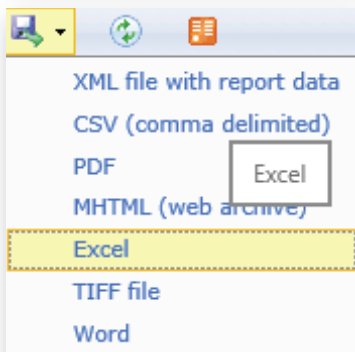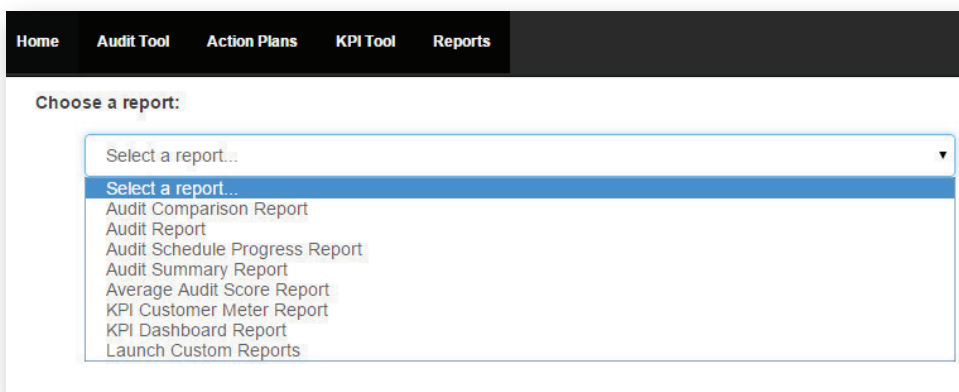
When the user selects a report from the list, a new web window is opened where additional parameters are competed and the report will be reviewed. All reports can be exported a variety of formats for further review and manipulation. The most common format will be Excel for data analysis, filtering and sorting. Click the Export button on the tool bar and the list of export formats will be visible.

Note: When the data exported to Excel will be broken down by page and put into separate sheets.

All reports will only show the user information for the branches they have access to within the QuickServe Process Tool.

Since these reports are very beneficial to analyzing the health of the QuickServe Process, time will be spent here describing them in detail.

Audit Comparison Report

This report will compare multiple audits, criteria by criteria. This report can be very useful to a Distributor QuickServe Process Leader or Branch Process Owner, to compare audits at the same location. For example, an audit done at a given branch last year, and the audit done last month at the same branch. This report can be viewed to see which specific criteria improved, or where issues continue to cause a lower score.

This report also provides regional leaders the ability to compare all of the branches in the region. This is very useful to find common areas of opportunity.

InShop Audit Criteria		Branch A: Self-Audit – 02/18/2014	Branch A: Self-Audit – 08/25/2014
GREETING THE CUSTOMER	Quality Interview	52%	78%
	Appointment Confirmed	95%	100%
	Contact Information Valid	72%	100%
	Equipment Information Complete	95%	100%
DIAGNOSING THE EQUIPMENT	Diagnosed Same Day as Equipment Available	50%	91%
	Diagnostic JSA Information Complete	90%	87%
	EDS Utilized During Diagnosis	0%	0%
	Troubleshooting Tree Diagnosis	79%	47%

>> Audit Report

The most common report most users will utilize is the Audit Report.   This report displays the data entered during the audit. It is most useful to review the entire audit. The report is broken down into the sections, the same as the audit was performed. The report is multiple pages long, and each page will export into a separate tab in Excel. This is very useful to analyze and review the work orders and the answer to each criteria. This particular information can then be filtered to review information such as work orders where the Qualified Technician criteria was answered N/A.

The only information not included on this report are the comments entered by criteria in the work order section. This information is available in the AuditWOCommentsReport discussed later.

Audit Details

Auditor Name	Audit Date	Audit Type Name	# Work Orders	Met Sample Size
Cai Yingying	06/23/2014	Corporate	24	Yes

Region	Distributor		Branch	
East Asia	Cummins China Investment Beijing		Beijing	

Audit Participant	Audit Title	Audit Participant	Audit Title
Zhang Xiangzhu	Supervisor	Liu Naru	Coordinator

Audit Participant	Audit Title	Audit Participant	Audit Title
Cai Yingying	QS team	Daisy Chen	QS team

Other Participants

Preliminary Questions

Question	Result
Is InShop performed at this location?	Yes
Is Mobile performed at this location?	Yes
Is EDS implemented at this location?	No
Is JSA implemented at this location?	Yes
Is NPS implemented at this location?	Yes
Customer Meter Question: "Started Repair When Requested"	YES: 86 NO: 0 N/A: 0 Score: 100%
Customer Meter Question: "Completed Repair When Promised"	YES: 79 NO: 3 N/A: 4 Score: 96%
Customer Meter Question: "Provided Status Updates During Repair"	YES: 76 NO: 6 N/A: 4 Score: 93%
Allegiance Data (last audit date to present): "Time to Complete Meets Your Expectations"	YES: 27 NO: 1 N/A: 0 Score: 96%

Tech To Admin Ratio

Service Advisor	Service Supervisor	Warranty Administrator	Diagnostic Technician	Repair Technician	Ratio
3	2	16	43		2.74

Audit Schedule Progress

This report lists the number of audits scheduled and the number of audits completed for a given date range. The information is reported at the distributor level, and is most beneficial for the ABO/RDO QuickServe Champion. This report uses the Next Scheduled Audit Date on the Home page of the QuickServe Process Tool to determine audit due dates. This is why it is important for the dates on the Home page to be accurate and not past due.

Audit Schedule Progress

Region: Mexico & Central America
Start Date: 1/1/2014
End Date: 9/30/2014
Report Executed on 10/28/2014 11:10:38 AM

Distributor	Audits Due	Audits Completed	% of Plan
Cummins Alesso	5	4	80%
Cummins de Baja	1	1	100%
Cummins de Centroamerica	4	4	100%
Cummins de Panama	1	0	0%
Megamak	2	1	50%

Audit Summary Report

The Audit Summary Report essentially summarizes the audits performed for a given region or country in the selected year. The first page of the report shows the number of branches, number of audits completed, and lists the locations that have an overdue audit. The remaining pages shows the summary score by criteria for all of the branches in the parameters. It is important to understand that the scores shown on this report are NOT the average of the percentages but the score is recalculated for each criteria. This report is very good for both Distributor QuickServe Process Leaders and ABO/RDO Regional QuickServe Champions. At a high level, it is easy to determine which parts of the process are clearly being performed every time, and which parts of the process need attention.

Summary By Criteria

Audit Section	Audit Topic	Audit Criteria	Percentage	
Branch Level Audit Criteria	QUICKSERVE STRUCTURE	QuickServe Structure Exists in Branch	72%	
		QuickServe Process Leader	69%	
		QuickServe Champion	77%	
		Staff QuickServe Qualified	64%	
	SERVICE BUSINESS MANAGEMENT	Tracking of KPIs	92%	
		KPI Review and Action Process	56%	
		Resource Scheduling System or Tool	77%	
		Include a WIP Report - Open Work Orders	69%	
InShop Work Order	GREETING THE CUSTOMER	Quality Interview	37%	
		Appointment Confirmed	32%	
		Contact Information Valid	86%	
		Equipment Information Complete	80%	
	DIAGNOSING THE EQUIPMENT	Diagnosed Same Day as Equipment Available	62%	
		Diagnostic JSA Information Complete	100%	
		EDS Utilized During Diagnosis	33%	
		Troubleshooting Tree Diagnosis	62%	
	QUOTING	Complete Repair Plan	84%	
		Complete Repair Quote (includes 4 Cs)	81%	
		Quote Timing	85%	

The last page of this report shows the scores by QuickServe Process Step. At this level the user can see, in the example below, that Communicating the Quote is the strongest score, but all other areas need improvement across the region.

Summary By Topic

Audit Section	Audit Topic	Percentage	
Branch Level Audit Criteria	QUICKSERVE STRUCTURE	69%	
	SERVICE BUSINESS MANAGEMENT	68%	
InShop Work Order	GREETING THE CUSTOMER	59%	
	DIAGNOSING THE EQUIPMENT	62%	
	QUOTING	83%	
	COMMUNICATE THE QUOTE	89%	
	REPAIR EVENT	74%	
	INVOICING	54%	
Mobile Work Order	GREETING THE CUSTOMER	64%	
	DIAGNOSING THE EQUIPMENT	60%	
	QUOTING	73%	
	COMMUNICATE THE QUOTE	78%	
	REPAIR EVENT	66%	
	INVOICING	46%	

Average Audit Score Report

The Average Audit Score report lists the distributors for the selected region and the average audit score for each distributor, for the selected year. If a Distributor QuickServe Process Leader selects this report, they will only see the distributor they support.

Average Audit Score Report

Region: NESEA Selected Year: 2014 Report Executed on 10/28/2014 11:28:36 AM	

Distributor	2014
Cummins DKSH (Thailand) Limited	81%
Cummins DKSH Vietnam LLC	89%
Cummins Japan Ltd.	
Cummins Sales and Service Korea Co., Ltd.	88%
Cummins Sales and Service Philippines Inc.	
Cummins Sales and Service Singapore Pte. Ltd.	
IESS Pte. Ltd.	94%
Jakson International Ltd.	95%
Mid-Pac Far East	92%
PT. Altrak 1978	86%
Scott & English (M) Sdn Bhd	83%
TradePromoters Pvt. Ltd. Sri Lanka	85%

QuickServe Customer Meter Score Report

This report shows the actual QuickServe Customer Meter Score for each distributor in the selected region. The score is calculated, it is not an average of the branch customer meter scores. Only the data the user has access is included in the report.

It is very important for Distributor QuickServe Process Leaders and ABO/RDO QuickServe Champions to pay close attention to this report, as it shows process execution performance from the customer's perspective. Keep in mind that the customer is the only one who can tells us if he/she is feeling the impact of the QuickServe process.

QuickServe Customer Meter
Did Customers Experience the QuickServe Process?

Greater Europe

2014 \ Jan to 2014 \ Sept

RED: At least one branch less than 65%
YELLOW: At least one branch 65% - 84%
GREEN: All branches 85% or greater

Distributor	Number of Branches	2014								
		J	F	M	A	M	J	J	A	S
Cummins Europe	22	82%	77%	89%	86%	88%	88%	87%	82%	83%
Cummins France	10	68%	76%		85%	82%	77%	81%	72%	78%
Cummins SerboMonte d.o.o.	2		78%		93%	100%	75%	91%		
ECV Portugal	2	78%	93%	83%	98%		100%	90%	80%	
Ergotrak	1									
Granly Diesel	1									
Israel Engines & Trailers	1									
Machinery Oy	1									
OOO Cummins	3	86%	88%	90%	82%	86%	77%	68%	71%	90%
OOO Kamss	1									
OOO Komtek	2									

From a Corporate Perspective, this report is shared with upper management on a Quarterly basis. Regional ABO/RDO QuickServe Champions are to work closely with the QuickServe Process Leaders in the field to understand gaps at the branch level preventing the proper execution of the QuickServe process. As mentioned previously in other chapters of this playbook, competitors have launched their own version of QuickServe; therefore, we must be determine to execute this process consistently and better than anybody else.

QuickServe Playbook

KPI Dashboard Report

This report is a graph of each KPI. The report is very flexible, and can be used to see graphical data for one or many branches. These trend graphs give the Distributor QuickServe Process Leader good information for the branches under his or her leadership. The ABO/RDO QuickServe Champion can use this information to view the health of the KPIs at a high level for all individual distributors, compare Company Owned and Independents, or for the whole region.
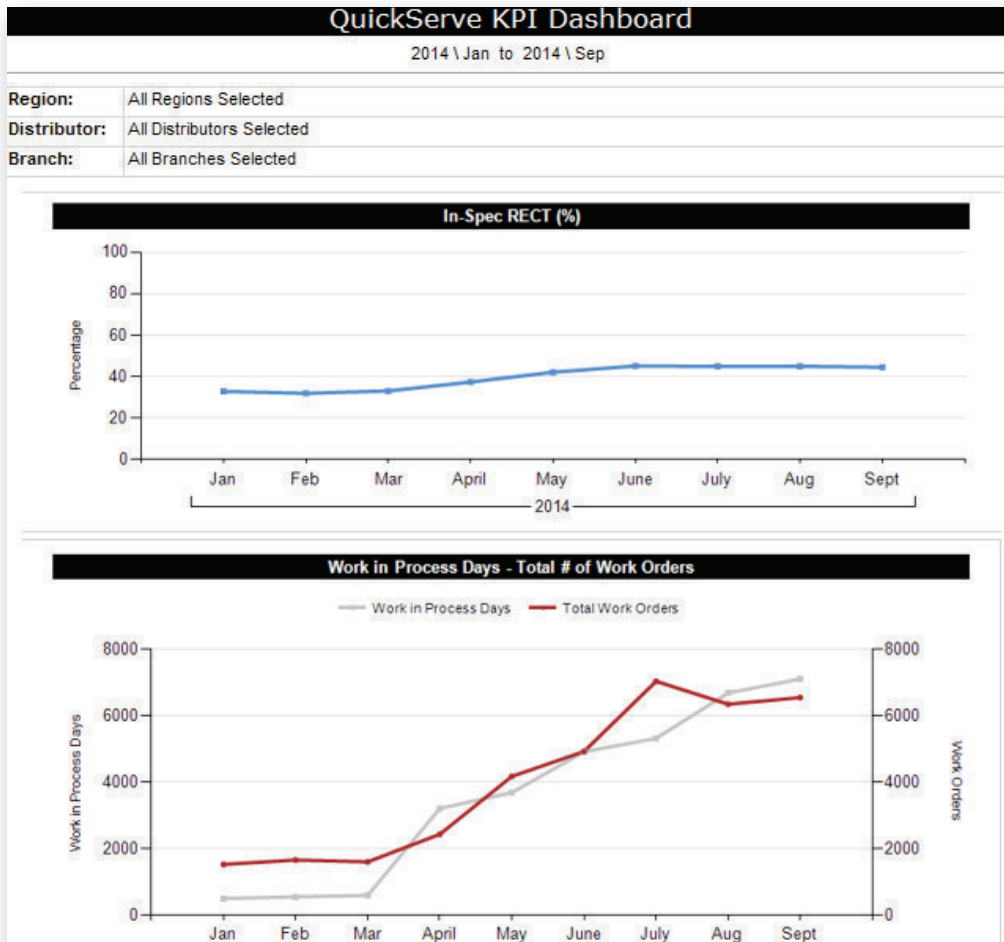
Launch Custom Reports

In addition to the reports in the drop down list in the tool, there are some custom reports that are also useful in measuring the maturity of the process. To get to these reports, select the option Launch Custom Reports from the drop down list. This will open a new internet window. Select the Home link in the upper right corner of the screen. Then select the Custom Reports folder on the page. This is where additional custom reports can be found. As new reports are developed, they will be made available in this location.
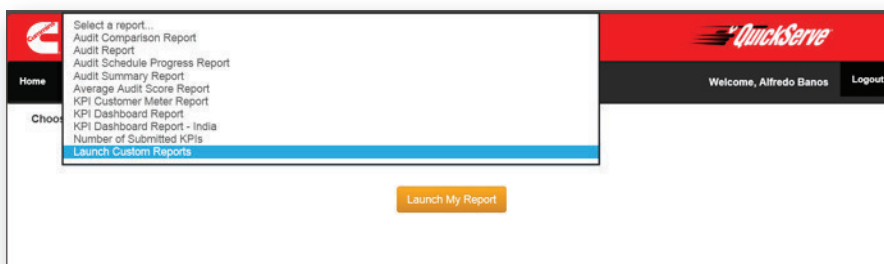
AuditWOComments Report   This report shows the comments entered for each work order criteria, for a selected audit. This report can be used with the Audit Report, for the complete audit information. When selected, the report will provide the user all of the comment data for all of the audits the user has access to view. For this reason, the best way to utilize this report is by exporting to Excel and filtering for branch audit desired, and then the different criteria where further information is needed. Another reason for using this report is to view the comments entered for N/A responses.

Region	Distributor	Branch	Audit Month	Work Order	Result	Question Name	Comment
Africa	Car & General Ltd	Dar es Salaam	10/22/2014	f11016	No	1. CSA captured / documented the correct complaint during the interview (either by using the Service Advisor Complaint Prompt Sheet/CIW, or other means). 2. Supporting details to help technician determine root cause are present in the Work Order. 3. Initial customer complaint in Work Order correlates to final resolution.	csa prompt sheet not attached.
Africa	Car & General Ltd	Dar es Salaam	10/22/2014	f11016	No	1. Evidence the customer was updated with important status events during the service repair (i.e., delays in repair, changes in repair, other issues, etc.).	no evidence
Africa	Car & General Ltd	Dar es Salaam	10/22/2014	f11016	N/A	A mobile quote was prepared for this Work Order. A mobile quote includes travel and diagnostics time.	customer on amc
Africa	Car & General Ltd	Dar es Salaam	10/22/2014	f11016	No	Equipment was diagnosed same day as equipment available, or time/date agreed with the customer.	not a breakdown job
Africa	Car & General Ltd	Dar es Salaam	10/22/2014	f11016	N/A	Invoice contain the 4 Cs Complaint, Cause, Correction, and Coverage.	invoice format does not have provisions for this.

NextScheduledAuditDateByBranch   This report goes hand-in-hand with the Audit Schedule Progress report. It shows the user details for each branch they have access to view. The view includes the Next Scheduled Audit Date in the system, the Last Audit Date and the Last Audit Score. The report can be used to see what branches have an audit past due, which branches have audits coming up, and individual scores for each branch audit.

Next Scheduled Audit Date

Region	Distributor	Branch	Next Scheduled Audit Date (MM/DD/YYYY)	Last Audit Date (MM/DD/YYYY)	Last Audit Score (%)
Middle East	AFGS Afghanistan Dealer	AFGS Afghanistan	11/3/2014		
Middle East	Cummins Qatar	Qatar	11/7/2014	5/7/2014	86
Middle East	Cummins UAE	Abu Dhabi	10/1/2014		
Middle East	Cummins UAE	Al Quoz	11/8/2014	5/8/2014	85
Middle East	Cummins UAE	Sharjah	10/1/2014		
Middle East	GCC Olayan	Al Khobar	9/1/2014		
Middle East	GCC Olayan	Gassim	9/12/2014		
Middle East	GCC Olayan	Jeddah	11/5/2014		
Middle East	GCC Olayan	Riyadh	11/1/2014		
Middle East	GTE Kuwait	Kuwait	1/5/2015	7/5/2014	74
Middle East	MICTA Iraq Dealer	MICTA Iraq	4/9/2015	9/18/2014	100
Middle East	MICTA Iraq Dealer	MICTA Iraq	4/9/2015	10/9/2014	82
Middle East	Orient Energy Systems	Islamabad	7/1/2014		
Middle East	Orient Energy Systems	Karachi	10/1/2014		
Middle East	Orient Energy Systems	Lahore	12/1/2014		
Middle East	SETI Jordan Dealer	SETI Jordan	12/1/2014	6/1/2014	77
Middle East	UES Oman Dealer	UES Oman	9/10/2015	9/10/2014	91
Middle East	YBA Kanoo Bahrain Dealer	YBA Kanoo Bahrain	11/21/2014		

KPI_Data_Report   All KPI data entered in the system is reported in this report. The report is generated based on the year selected in the parameters. When selected, the report will provide the user all of the comment data for all of the audits the user has access to view. This is not a printable report, as it was designed to complement the KPI Dashboard report, and provide each KPI entered for each month.

Region	Distributor	Branch	Year	Month	# Repairs <= 3 Days	# Repairs > 5 Days	Available Hours	BE Applied Hours	Billed Hours	Billing Efficiency	In-Spec RECT
	CVSMG	Campo Grande	2014	Jul	34	8	513	399	341	85	74
				Aug	22	13	476	398	369	93	52
				Sep	25	9	524	71	71	100	68
		Cuiaba	2014	Jul	34	25	654	812	666	82	54
				Aug	38	6	742	385	289	75	81
				Sep	16	15	813	392	428	109	46
		Salvador	2014	Jul	60	51	1275	462	682	148	51
				Aug	52	36	1343	802	1343	167	55
				Sep	66	29	1275	476	529	111	63
		Sao Jose (CVSMG)	2014	Jul	22	21	506	322	394	122	50
				Aug	59	41	598	503	432	86	57
				Sep	74	33	663	371	423	114	68
		Sao Paulo	2014	Jul	18	40	1007	1216	865	71	29
				Aug	2	32	1309	1672	3781	226	6
				Sep	15	19	1284	973	1976	203	43

QSCustomerMeterByBranch   This report shows the Customer Meter scores by branch for a given Year, Month and Region. This report is very good to determine which branch or branches had lower scores causing a non-green on the KPI Customer Meter Report.

QS Customer Meter Data
Greater Europe
Requested for: 8 / 2014

Distributor	Branch	Branch Description	QS Customer Meter Score	QS Customer Meter Total Questions	QS Customer Meter Total Yes
Cummins Europe	Ansbach	Cummins Deutschland GmbH	85	39	33
	Belgium		65	23	15
	Gdansk	Cummins Poland	88	25	22
	Gross-Gerau	Cummins Deutschland GmbH	82	170	140
	Hamburg	Cummins Deutschland GmbH	83	46	38
	Italy	Cummins Italy	89	19	17
	Krakow	Cummins Poland	80	60	48
	Lubin	Cummins Poland	88	16	14
	Netherlands		72	47	34
	Turkey		71	72	51
	UK - Aberdeen	Cummins UK	100	18	18
	UK - Cumbernald	Cummins UK	83	35	29
	UK - Dublin		100	3	3
	UK - Iver	Cummins UK	91	45	41
	UK - Leeds	Cummins UK	82	124	102
	UK - Wellingborough	Cummins UK	92	37	34
	Total			776	639

The Reports User's Guide is attached in the Appendix for your reference if you required additional information on how to use the reports.

>> Final Thoughts

This tool was developed for you to evaluate and determine how to correct process gaps at a branch, distributor and even regional level (depending on your access). The combination of observing the process live (observational audit) and reviewing completed work orders from beginning to end provides a clear picture on how well the QuickServe process is being executed on any location.

The most important portion of the audit is the audit plan. The evaluator needs to make sure that everyone in the branch understands the gaps, get a consensus on what needs to be done to correct them and fulfill any needs that the branch may have that is preventing proper execution of the process. Some of these needs might be related to training, tools, and resources. Some of the gaps might drive "just do it" actions, while others might take some time. The success of the Action Plan execution relies on how much ownership the branch takes on it. Therefore, this last step of the audit process cannot be done in isolation from the team.

Encourage the branch to look beyond the score, the QuickServe Web Audit Tool was meant to be a thermostat to check for the health of the process and not a baseball bat to punish people. As the evaluator goes through the audit, he/she needs to take the opportunity to coach the branch on how to improve on the missed criteria. As the Action Plan is developed, the evaluator needs to take a role of facilitator and let the branch service staff provide the input on what needs to be done to close the identified gaps.

Remember the road to customer support excellence is a journey and not a destination.

Key Performance Indicators (KPIs)

>> The Importance of Key Performance Indicators:
What Gets Measured Gets Done

In this section, we will focus on the importance of Key Performance Indicators (KPIs). We've all heard the saying, "What gets measured gets done." The same applies to your service business. Regularly measuring and reporting of your service KPIs allows you to stay focused and use that information to make business decisions to improve your service operations.

Here are six critical KPIs service KPIs that should be used to manage the profitability of your service business:

■ *T/B Ratio:* KPI at the highest level and used as a gauge to monitor service business performance and where to investigate. Measures the relationship between total technician labor hours that were purchased by the distributor against those technician labor hours sold or billed.

■ *Labor Utilization:* Reflects the degree to which a service location keeps technician available labor hours applied on billable jobs (including retail and warranty) versus lost time or non-revenue generating work.

■ *Productivity:* Measures the distributor's ability to get technicians onto billable jobs and their ability to convert technician's available labor hours into billed hours.

■ *Billing Efficiency:* Measures the percentage of technician labor hours that are applied on billable jobs (retail and warranty) against the technician labor hours that are invoiced to the customer.

■ *Work in Progress (WIP):* Measures the cost value of all open work orders for a given time period.

■ *Paper in Process (PIP):* Measures the amount of time (hours) between completion of a job and when that job is invoiced to the customer.

Here are four additional KPIs that measure customer loyalty and our ability to respond to the customer. Further information on NPS, QuickServe Customer Meter and the Repair Timeliness Customer Measure are outlined in Chapter 11.

■ *Net Promoter System:* A standard process used to measure, understand and improve customer loyalty.

- *QuickServe Customer Meter:* Measures the customers' perception of the QuickServe process throughout the entire repair event. In other words, is the customer feeling the QuickServe process?

- *Repair Timeliness Customer Measure (RTCM):* Metric that measures whether or not the time to repair met the customers' expectations.

- *Repair Event Cycle Time:* Measures cycle time of the repair. This metric looks at the time from when a piece of equipment was made available to the Service Department until that work order has been invoiced.

The above KPIs reflect the performance of your service operations. They are measurable, objective and actionable. Think of it this way: these KPIs will help you monitor your service operations ensuring you are managing your workshop and field activities as efficient and profitable as possible.

Now, let's look at each KPI in detail.

>> Total to Billed Ratio (T/B Ratio)

What is it?

T/B Ratio is a metric that reflects at the highest level, the Distributor's performance in managing and billing service labor hours. (i.e. technician labor hours purchased vs. technician labor hours billed). This measure will have greater meaning when looked at over longer periods of time, as a longer time horizon will smooth out any seasonal fluctuation in WIP.

How is it calculated?

$$\text{T/B Ratio:} \quad \frac{\text{Total Hours}}{\text{Billed Hours}}$$

Definition of Factors

- *Total Hours* — All hours purchased from a defined population of Technicians for a defined time period.
  - Includes: regular hours, overtime hours, vacation time, sick time, etc.
- *Billed Hours* — All technician labor hours billed to Customers during a defined time period.
  - Includes external customers — invoiced hours.
  - Includes internal customers — example: 'support bank rebuilds'.
  - Includes warranty — hours invoiced on warranty department.
  - Includes policy jobs — hours invoiced on marketing department.

Why is this important to know?

T/B Ratio drives improvement by consistently focusing attention, plans and actions to maximize the hours productively applied and billed while minimizing the labor hours being expensed. The main focus of a profitable service business is to maximize productivity and efficiency by identifying lost hours from those labor hours "purchased" from Technicians.

Benefits of measuring T/B Ratio:

By understanding the reasons of abnormal trends and implement corrective action plans, the service business should improve its recovery of Technician labor hours, better optimize the number of Technicians required and improve overall profitability of the Service department.

Critical things to know about this report:

- In general, a higher T/B Ratio means a lower service net income.

- In general, a lower T/B Ratio means a higher service net Income.

- A typical T/B ratio is <1.5; however, T/B ratios can be less than 1.0 for a period under certain circumstances. Note: Lower numbers are better for T/B Ratio.

- There will be fluctuation with WIP (Work In Progress) on a monthly basis, when jobs have not been closed or invoiced, but Technicians have booked hours.

- There can be fluctuation during holiday periods, due to illness or as a result of extensive training.

- Care required when comparing different territories due to variation in vacation and working hour legislation.

- Organizations with a higher proportion of apprentices can have higher T/B Rations due to training, lower efficiency and recovery rates.

- This report should be reviewed in combination with other service productivity measures.

- Any small improvement in the T/B Ratio can lead to a significant increase in the distributor's profit ass any additional hour billed has an impact on the bottom line

For more information, there is a short KPI training video available on the QuickServe page at Cummins Connect and the Distribution Portal.

T/B Ratio

TOTAL HOURS ÷ BILLED HOURS = T/B RATIO

- regular hours
- overtime hours
- vacation time
- sick time
- training
- etc.

Welcome to the fourth KPI video segment focused on providing training and additional information on each Service KPI. The video below focuses on *T/B Ratio*. With T/B Ratio being a productivity measure at the highest level, it is critical to raise awareness when the number of paid technician hours exceeds the number of hours billed to our customers.

For Multicast Link -- click here
For Download -- click here

>> Labor Utilization

What is it?

Labor Utilization reflects the degree to which a service location keeps technician available labor hours applied on billable jobs (including retail and warranty), versus lost time or non-revenue generating work.

How is it calculated?

$$\text{Labor Utilization (\%)} = \frac{\text{Applied Hours}}{\text{Available Hours}}$$

- *Applied Hours* — Technician labor hours which are applied on billable jobs, including internally billed jobs, regardless of the number of technician labor hours which are invoiced.

- *Available Hours* — Are the hours paid to technicians less paid holidays, paid leave (either annual or sick), vacation, and paid days absent. Essentially — available hours are the hours a technician was at work and available to be assigned to a productive job, including supervision hours.

Why is this important to know?

Labor Utilization is all about understanding how our technician available hours are being utilized. This measure allows for the identification of technician labor hours that are not being allocated to billable work orders. This information can then be used to better optimize the management of your technician labor force in order to maximize service profitability.

How do I use Labor Utilization to drive my business?

Labor Utilization helps maximize efficiency by identifying reasons for technician labor hours not being applied towards billable jobs. Additionally, this measure helps optimize the number of technicians required to support the service business.

Why would we want to use a skilled and valuable resource, like a Cummins technician, to clean the floor, paint, or maintain the facility? Do technicians need to wait around or chase down their supervisor to get the work order for the next job? Always look at the labor hours not being billed and investigate the reason as to why. Measure and set expectations with your service team. As a general rule, labor utilization should be greater than 85% and is a key service measure that should be reviewed before deciding to hire additional technicians.

Benefits of Measuring Labor Utilization

Measuring labor utilization ensures that the distributor has the necessary measures in place to effectively manage available technician labor hours. This in turn has an impact on service profitability. The goal of monitoring labor utilization is to optimize your technician labor resources in order to maximize the number of available technician labor hours that get applied on billable jobs.

For more information, there is a short KPI training video available on the QuickServe page at Cummins Connect and the Distribution Portal.

>> PRODUCTIVITY

What is Productivity?

Productivity compares the technician available hours against the number of hours invoiced or billed to customers. Productivity is measuring the distributors' ability to sell technician labor hours and is a combined measure of workshop and technician efficiency.

How is it calculated?

$$\text{Productivity} = \frac{\text{Billed Hours}}{\text{Available Hours}}$$

- *Billed Hours* — Re the hours which are invoiced on billable jobs, including internally billed jobs, regardless of the number of hours the technician worked

- *Available Hours* — Are the hours paid to technicians less paid holidays, paid leave (either annual or sick), vacation, and paid days absent. Essentially — available hours are the hours a technician was at work and available to be assigned to a productive job, including supervision hours.

Why is this important to know?

Calculating and measuring productivity helps you to optimize both labor management and service profitability. It also triggers further investigation to identify reasons for lost or unproductive hours and implement corrective actions. There are six factors that have an impact on productivity:

1. Measuring and tracking systems
2. Roles and Responsibilities
3. Training
4. Facilities
5. Equipment
6. Communication

Measuring and Tracking Systems

Measuring and tracking systems have a direct impact on the effective management of technician labor by tracking technician actual time, technician available time, technician non-productive time (idle time) and technician sold time. If a tracking system is not in place, it will be very difficult to get the number of billed hours required to reach an effective labor recovery rate. Another critical system is job scheduling. Job scheduling is a science not easily learned; it takes a great deal of self-discipline and practice to master it.

Roles and Responsibilities

The QuickServe process clearly defines the roles and responsibilities for a productive operation. For instance, the Customer Service Advisor (CSA) is a person who enjoys interacting with people and is able to handle all of our customer needs and expectations. Technicians should embrace the engine diagnostics and repairs while truly being team-oriented. Distributors need to ensure they select the right staff with the correct customer attitude.

Training

Having certified Technicians working on Cummins engines is not only a customer expectation but a business requirement. Having technicians properly trained will avoid poor quality repairs which could result in job comebacks or making costly mistakes which could involve several hundreds or thousands of dollars being absorbed by the distributor.

Facilities

In large distributors, it is common for a technician to walk 50 to 100 feet to speak with the Customer Service Advisor, Service Supervisor, and/or obtain parts. The facility should be evaluated to ensure that inefficiencies for flows of information, parts, ergonomics, and job wait times are reduced. Keep in mind that a good flow in a facility means reduction of waste, which translates to more revenue towards your bottom line.

Equipment

All tools and equipment should be available, ready to be used and in working condition as our technicians may be required to use as they diagnose, repair, or test Cummins products. Distributors should develop an overall plan that provides an evaluation of existing tools and equipment to determine its continued usefulness, disposal of the obsolete, purchase and implementation of new tools, budgeting, and a repair process. If a technician does not have the

appropriate or necessary tools not only will this impact the repair but on his/her ability to complete the repair in a timely manner.

Communication

When it comes to planning the repair, communication between the Customer Service Advisor, Service Supervisor, Technician, and Service Parts Specialist is essential in meeting our customers' expectations on repair timing. Improvements in communications could include intercoms, cell phones, 2-way radios, etc., to reduce the amount of foot travel currently experienced in most of today's workshops.

For more information, there is a short KPI training video available on the QuickServe page at Cummins Connect and the Distribution Portal.

Productivity
Welcome to the final installment of the QuickServe KPI Overview Videos, aimed at providing training and additional information on each Service KPI. The video below will focus on *Productivity*. Productivity measures a distributor's ability to sell technician hours by comparing technician available hours to the number of hours invoice or billed. In other words, productivity aims to help a distributor maximize their ability to sell technician hours.

For Multicast Link -- click here
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>> Billing Efficiency

Definition

Billing Efficiency measures the proportion of technician billed labor hours against technician applied labor hours. This measure will raise awareness to the fact that sometime we are not able to bill all the actual technician labor hours to the customer. This is a combined measure looking at Technician Efficiency and Quotation Accuracy.

Reporting Formula

$$\text{Billing Efficiency} = \frac{\text{Billed Hours}}{\text{Applied Hours}}$$

Example:

Total number of technician labor hours invoiced against closed jobs in period = 1290 Hours

Total number of technician labor hours applied to those same jobs = 1440 Hours

Billing Efficiency = 1290 / 1440 = 90%

Definition of Factors

■ *Billed Hours* — Technician labor hours billed to customers (including internally billed jobs) during a defined time period.

■ *Applied Hours* — Technician labor hours which are applied on billable jobs, including all internally billed jobs, regardless of the number of technician labor hours which are invoiced

Goal/Aim

Billing Efficiency is a measure that helps you maximize service profitability by identifying gaps between technician billed hours and technician applied hours. The goal is to bill all of the hours our technicians apply onto a productive

job; however, we recognize that this is not always the case. Billing Efficiency is a key service measure that should be reviewed on a monthly/quarterly basis by management. These reviews should prompt the necessary question as to "Why were we not able to bill all of the technician applied hours this month?"

How Can I Make Improvements?

Breaking down the technician labor hours not invoiced and comparing those hours against other period and/or branches in the same region will provide valuable insight. The key for improving Billing Efficiency is to understand the reason as to why we were not able to bill all of our technician applied labor hours. Some common factors that affect Billing Efficiency include: a poor customer interview, lack of technician training, inaccurate quotations, incomplete job plan, poor internal and external communication, and low technician efficiencies. Once you've identified the issue — work with your service team to correct the problem.

Benefits

Improving Billing Efficiency should improve the recovery rate of Technicians' labor hours and improve the overall profitability of the Service department

Critical things to know about Billing Efficiency

- Warranty and internal billable jobs should be included on this metric.
- Organizations with a higher proportion of apprentices can have lower invoice efficiency due to lack of experience and lower productivity rates
- This report should be reviewed in combination with other service productivity and efficiency measures

For more information, there is a short KPI training video available on the QuickServe page at Cummins Connect and the Distribution Portal.
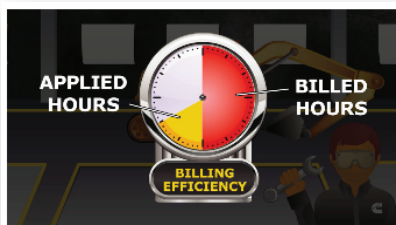
Billing Efficiency

Welcome to the third KPI video segment focused on providing training and additional information on each Service KPI. The video below focuses on *Billing Efficiency* and is intended to help organizations understand the fundamentals of this service metric, the reasons why we are not able to bill as much labor as we have invested onto productive jobs, actions to improve this metric, and the impact Billing Efficiency can have on profitability.

For Multicast Link -- please click here
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>> Work in Progress (WIP)

What is WIP?

Work in Progress is defined as the age and cost value of all open work orders for a given time period.

How is it calculated?

WIP can be analyzed in three ways:

First—WIP is looked at in a dollar value. The WIP dollar value is associated with all costs; including Labor, Parts and Miscellaneous, for all open work orders. WIP ($) is a critical measure to help service organizations better understand their working capital. The faster you can bill or invoice a work order, the sooner you can recover on your investment.

WIP ($) = WIP Labor Cost of Sales + WIP Parts Cost of Sales + WIP Misc. Cost of Sales

Second — is WIP by Age, which looks at the number of open work orders grouped into categories based on how many days that work order has been open: 1-3 Days, 4-10 Days, 11-30 Days, 31-60 Days, 61-90 Days, and > 90 Days. WIP by Age does not start until a cost has been applied to a work order. Once first cost (either labor or parts) has been applied — WIP by Age begins.

WIP by Age (days) = Current Date — WIP First Cost Applied Date

Third — WIP can be viewed as a ratio used in terms of days to display the cost value of open work orders against the average day's cost of sales for the Service Department.

WIP DSO = WIP ($)

(Service Cost of Sales ($) / 365)

Example:

For 22-June the following costs are spread out on all open work orders;

WIP Labor Cost of Sales = $2,341.54

WIP Parts Cost of Sales = $6,352.77

WIP Misc. Cost of Sales = $472.42

Prior Year Service Cost of Sales = $1,375,358.54

WIP in Terms of Days/Sales = ($2,341.54 + $6,352.77 + $472.42) / ($1,375,358.54 / 365)

= $9166.73 / $3768.11 = 2.43 Days

Definition of Factors

- *WIP Labor Cost of Sales* — any labor cost that has been applied to a work order. Example: technician labor hours to diagnose or repair the equipment.

- *WIP Parts Cost of Sales* — any parts cost that has been applied to a work order. Example: cost of a part(s) used to complete a repair.

- *WIP Misc. Cost of Sales* — any miscellaneous cost that has been applied to a work order. Example: cost of coolant to top off a water leak complaint

- *Service Cost of Sales* — Cost of Parts sold through the Workshop and Field Service at landed cost, including direct shipping costs and Labor at Standard Cost i.e. full Salary, Wages and Fringes for Service Technicians, plus actual costs of other goods or services sold through Service.

- *WIP First Cost Applied Date* — The date labor, parts or miscellaneous cost was first applied to a work order.

Why is this important to know?

WIP is designed to help monitor work activities and highlight any work orders which have remained open for an excessive length of time. Additionally, when WIP is looked at in dollars - it shows the amount of working capital that is tied up in jobs in progress. The focus of WIP management should be to minimize the number of jobs with a high WIP age and maintain a low overall WIP ($), relative to current business levels.

Visibility of WIP Reports

Keeping open work orders visible makes a big difference on your WIP! Ensuring all members of your service team are aware of existing issues on open work orders allows for better communication and the resolution of issues. One solution to raise awareness was developed by the Cummins South Pacific team. They created a "Top 60 Countdown"

with the purpose of creating awareness and accountability for open work orders idling in WIP with no labor cost allocated for more than 30 days. An example of this report is below.

Chart Toppers	Work Order #	Facility / Branch	COS ($)	Responsible Supervisor	Total Days Open	Total Days with No Labor Allocated	Service Manager Response Plan
1	142345	132	$55,014.67	FN999	429	408	
2	142365	154	$4,236.52	CU003	406	392	
3	142445	139	$16,831.24	CU003	345	310	
4	142745	132	$874.39	HB257	289	305	
5	152345	154	$7,677.69	CU033	303	300	
6	152955	139	$1,349.68	HW262	170	161	
7	142125	132	$6,262.18	HF470	175	157	
8	122345	154	$228.00	DI259	142	132	
9	154236	139	$941.20	DI259	146	140	

Running a WIP report daily will help to identify potential barriers on individual work orders before they become problems. Resolving these issues will help reduce your exposure to unrecovered labor and increase your invoicing capability.

The Importance of Controlling WIP

Work in Progress (WIP) is one of the pillars in building a "Lean" environment (maximizing value and minimizing waste) in a repair shop. Monitoring WIP is often an overlooked practice due to lack of resources or other priorities taking place in your service department. As you will read below, WIP is one of the key KPIs which directly influence various areas in the shop. That is why, the emphasis of paying close attention to this critical KPI. Our Regional and Distributor QuickServe Champions have been trained on this important metric and should know how to calculate, monitor and control it if you should have any questions.

Why is it important to monitor WIP on a daily basis?

1. **Effective use of Working Capital:** WIP costs money (material, parts and labor); and excessive WIP means an excess of working capital tied up in a repair that has not been invoiced. The faster the repair is closed and invoiced, the faster it will be to recoup your return of investment; plus any additional revenue in parts and labor margin.

2. **Storage Space and Housekeeping:** The higher your WIP, the more storage space is required to keep "incomplete engine repairs" in the workshop. This results in engine repairs waiting in paint rooms, outside the shop, or other key areas of the shop for a longer period of time. This increases the possibility of dirt and dust accumulating in some of the engine components as well as taking up critical space in a limited area. Consequently, additional non-value added costs are incurred by properly protecting/wrapping the engine and moving the engines around to find a place to store them while waiting for parts or labor. Furthermore, the workshop will display an image of poor planning in the eyes of the customer.

3. **Quality Control:** High levels of WIP could result in quality issues during the repair. For example, as the repair is on hold, it relies on how well the repair steps were documented, the components storage conditions from dust or other environmental factors could increase the chance for rework or comebacks. Also, rushing throughout a repair increases the chances to overlook important aspects of the repair which could potentially affect the overall quality of it.

4. **Response to Customer Needs:** We sell products which in the vast majority are assets of production; for example: an on-highway truck that carries goods for a transportation company, or a vessel that transports personnel to a platform or a mining truck hauling copper. Our customers expect their repairs to be done quickly as they are losing income and time by having a machine down. There are some jobs that simply take longer such as high horsepower rebuilds, but with careful planning and adherence towards the QuickServe process we can advise our customers on how long the repair will take so he/she can make the necessary arrangements for their business. However, when repairs goes beyond what we committed, our customers are the ones who are impacted by those delays; which can be very aggravating for their business.

5. **Accountability:** Monitoring WIP on a daily basis provides service management with critical pieces of information, such as: (1) Job Status — allows management to resolve any outstanding issues on why a repair may be taking longer than planned, (2) AOP or Planned Levels — most shops have a "quota" or a plan to meet each month, by monitoring the number of jobs in progress management can be sure to know if they are on track to meet plan, and (3) WIP Report must be Visible — this provides accountability to everyone involved in a repair. Would you want to be tied to a work order that has been open for 130 days?

What factors impact WIP?

For such an important service KPI, it is concerning that many distributors simply do not know how much WIP they have at any given time, let alone trying to properly control it. When WIP is not seen as a priority, a systematic approach is lacking where people work to their own "perceived" priorities which typically results in carrying unnecessary high levels of WIP.

Typically when distributors do not control WIP, we have seen that the actual WIP level could be weeks or even months' worth of work! WIP should be monitored daily to identify root causes and solutions to complete the repair, close the work order, deliver, and invoice the customer. Remember -WIP has a direct impact on cash flow.

Pie Chart of Job Numbers vs WIP Status

- Awaiting Customer Approval
- Awaiting Payment Method
- Awaiting Parts
- Dispute with Customer
- Ready to Invoice / Job completed
- Job in Progress
- Missing Work Order File
- Parts / Movex Issue
- Warranty
- Awaiting Technician

As you look WIP, being to start to question extreme high values. The idea of monitoring WIP ($) and WIP by Age is to keep track of the labor hours and part expenses being accumulated on any given job.

Any high value requires additional investigation to better understand which particular job is accumulating a higher-then-expected number of labor hours and/or parts expenses.

You should also check for status comments on work orders to understand why a job is still open. Here are some good questions to ask:

- Why have these work orders not yet been closed?

- Has the status of repair been updated on the work order?

- Does the work order status properly detail what's causing the delay?

Understanding the status of all work orders will help you determine reasons for high WIP, attached is an example that shows some of the reasons impacting WIP. This information will help you identify areas of opportunity to reduce Work in Process and increase service revenue for a given month. Reducing WIP will have a direct impact on RECT as well.

Common Areas Impacting WIP

■ Delays in getting a Purchase Order from the customer

■ Warranty vs. Non-Warranty work: Customer payment arrangements established before work begins

■ Parts Availability

■ Technicians skill and efficiency to carry out initial troubleshooting

■ Technician skill to carry out the repair

■ Not capturing all relevant information on the job opening sheet

Recommended steps to control WIP

There are seven steps to control WIP:

1. *Educate* — Before starting measures to reduce WIP to an optimal level, it is essential to educate your Service team on WIP and how it financially impacts the profitability of the shop.

2. *Measure* — WIP has to be measured. A daily report should be created to identify WIP (in both cost value and by age) by work order after each days service workshop report.

3. *Target* — A target should be determined and agreed with management on what the optimal WIP ($) and WIP by Age should be at each particular location. This can best be expressed in Days of Sales Outstanding and should be sufficient to enable the repair location to cover its Service Cost of Sales with Working Capital.

4. *Plan and Communicate* — To achieve targets, a clear understanding of what the measure is among all the key players handling all the different aspects of the QuickServe process is required. Everyone needs to have clarity on why WIP is a critical KPI to track.

5. *Monitor* — This means to compare actual target against the daily target. Total WIP levels should be monitored by calculating and reporting actual WIP levels against the target. Having daily visibility of WIP allows for corrective actions to bring that repair from an open status to a close status quickly.

6. *Control* — This identifies areas that are impacting high WIP levels and prompts corrective actions to be implemented. For example, if high WIP work orders are impacted by lack of parts; then, inventory levels need to be re-evaluated.

7. *Improve* — As with any KPI, the goal should be to achieve the target consistently and then aim for continuous improvement. Achievement against target should be plotted overall in order to identify trends and areas where further improvements can be made.

Conclusion

WIP reduction requires management commitment and time. Service Supervisors, Technicians, Parts Specialists, Service Writers, and Customer Service Advisors need to be engaged so the proper priority is given to WIP. Before starting a WIP reduction program be aware that it will only be successful if systems and processes are put in place to ensure good planning and that accurate and achievable targets are set and communicated. The good news is that a simple calculation of the financial benefits in reducing working capital alone, provides a compelling reason why WIP management should be everyone's priority.

Consider a distributor who has fourteen days of WIP equaling $56,250.00 (combined parts and labor). Focusing on finishing those repairs and invoicing immediately will reduce the working capital invested and quickly turn those cost of the business into revenue generating sales for the service department. .

Equally important is fast and accurate daily reporting of any WIP shortage before it affects the shop workflow.

Given the benefits, it makes good sense for any distributor to invest not only its time and effort on achieving WIP control, but also invest in systems that greatly simplify the process of scheduling, capacity management (tech to admin ratio), reporting, and identify any problem areas.

Running a distributor's service operation profitably today has become much more of an exact science than in past years. The QuickServe process gives you the opportunity to change course to a more profitable business by having trained champions on how to measure this critical KPI, how to determine a benchmark and set an achievable goal, and how to implement changes to achieve them.

For more information, there is a short KPI training video available on the QuickServe page at Cummins Connect and the Distribution Portal.

Work-in-Progress (WIP)

Welcome to the first of eight video segments focused on providing training and additional information on each Service KPI. The video below will focus on **WIP** and is intended to reinforce the importance of getting good control on WIP at each service location, in order to optimize cash flow.

For Multicast Link -- please click here
For Download -- please click here

>> Paper-in-Process (PIP)

In any distributor service business, working capital is crucial to keep the shop open and running; therefore, the availability of cash on hand is crucial to cover payroll, parts purchases, maintenance on the facilities, service trucks, fuel, workers compensation, etc. In the Service arena, all these payments are made thru the services that your distributor provides and the invoices we make to our customers. When work orders are closed -but not invoiced - invoices do not go out, payments do not come in and cash flow dries up. The solution is simple: as soon as you close a work order, invoice the customer. This is why PIP is important to monitor. This measure will help your organization manage its working capital. Having an efficient billing process, once the repair is completed, is key to ensure your Service Department is quickly turning the costs of the repair into service sales.

How is it measured?

Paper-in-Process is the measure of time that elapses between parts and labor being applied to completed repairs that have not yet been invoiced. A common example is on warranty repairs in which warranty claims have not yet been filed.

How is it calculated?

Paper-in-Process (in hours) = Invoice Date — Last Labor Applied Date

Billable hours mean nothing if you are not getting paid. If you delay even two or three days, you will begin to forget important details regarding the service event in question. You are more likely to get paid for all of your services by presenting the invoice immediately after the work was done. To accomplish this, your Service department's administrative staff need to understand the challenges, limitations and opportunities of invoicing work orders once last labor has been applied on the job.

Paper-in-Process can be affected by all types of payers. Ensuring your administrative staff has a firm understanding of customer payment expectations, as well as the various warranty processes will help ensure PIP stays within specification. Furthermore, training your administrative staff to identify and remove obstacles prior to last labor being applied will limit one's exposure to high PIP results.

Managing PIP and the billing process begins with first contact with the customer. Ideally the person who opens the work order owns it throughout the process and is responsible for closure.

From the customer's perspective, submitting invoices late can negatively impact their operations as some companies have quarterly or even monthly budgets. A delay in getting your invoice could potentially impact their bookkeeping. Ensuring invoices gets sent to your customers' in a timely manner shows that you have respect and care for their business.

The first and best way to influence PIP is to measure it and set a goal. We recommended an optimal performance range of 24 hours for field jobs and 12 hours for workshop. People respond to measures and expectations. Remember that poor cash flow kills more businesses than poor profitability.

For more information, there is a short KPI training video available on the QuickServe page at Cummins Connect and the Distribution Portal.

Paper-in-Process (PIP)

Welcome to the second of eight video segments focused on providing training and additional information on each Service KPI. The video below will focus on **PIP** and is intended to help organizations manage their working capital and discuss why an efficient billing process is critical towards your Service Department's business success.

For Multicast Link -- please click here
For Download -- please click here

>> Repair Event Cycle Time (RECT)

Definition

Repair Event Cycle Time is measured from the time the equipment is made available to your Service Department through the time the work order is invoiced. In other words, it measures the entire service event through put or cycle time as shown in the following figure.
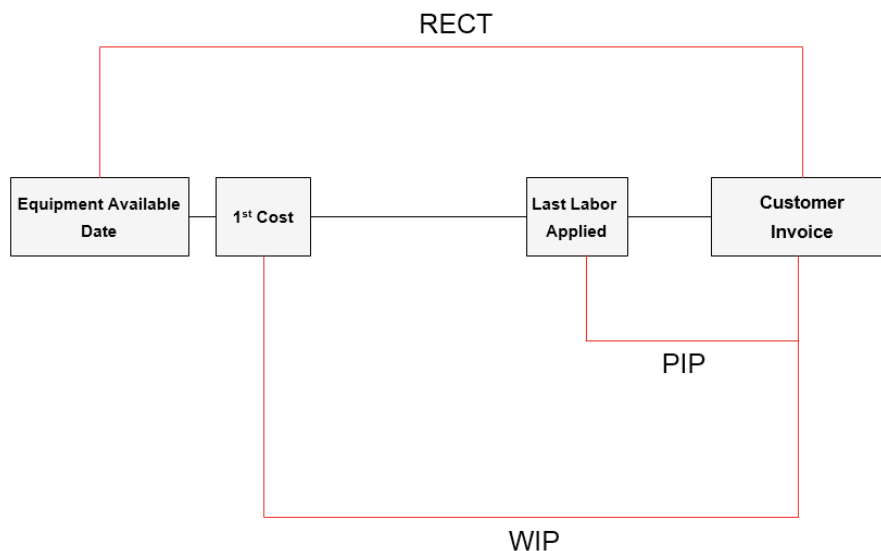
RECT = Invoice Date/Time — Equipment First Available Date/Time

When does the clock start and stop for work orders to be included in the RECT measure?

■ The clock starts when the equipment has been made available for repair. "Equipment available" is defined as:

 • *In-Shop:* When the equipment is made available for tow-in to the repairing location or when the equipment is physically delivered to the repair facility.

 • *Mobile:* When the customer indicates the repairing entity may have the equipment for repair. If the customer calls and asks that the equipment be repaired immediately, the equipment should be considered available. If the customer schedules a date and time, that scheduled date/time should be the equipment available date.

■ The clock stops when the repair invoice has been generated.

The standards for RECT call for the completion of minor repairs (4 hour or less of repair time) within 24 hours (1 day) and the completion of major repairs (over 4 hours of repair time) in 72 hours (3 days). These standards were derived through formal research of customer requirements. Outside the USA and Canada, due to measurement system issues with some of our business systems, we have simplified this standard and measured ALL repairs against the three (3) day standard. Any repair that meets these standards is classified as "In Spec Performance".

North American RECT Goal

■ Minor Repair RECT goal is ≤ 24 hours

■ Major Repair RECT goal is ≤ 72 hours

International RECT Goal

■ All repairs RECT Goal is ≤ 72 hours

Minor Repair is defined as any repair where the total SRT hours allotted for the job are less than 4 hours total

Major Repair is defined as any repair where the total SRT hours allotted for the job are ≥ 4 hours total

What work orders are to be Included in the RECT measure?

The objective of measuring RECT is to improve responsiveness to the customer and to minimize downtime. Accordingly, the measure is to include repairs (both in-shop and mobile) that impact the customer out of service time. Generally, those work orders that should be included in the measure are customer work orders (i.e. work orders where the customer's equipment is down while you are performing the repair).

It is recognized that there are some repairs that cannot physically be completed within the RECT standards. This is accounted for in the RECT metric by establishing a lower "percent in spec" level in order to be "green" on the measure. Today, the percent in spec requirement is 60 percent. ALL work orders that affect customer downtime should be included in the measure, regardless of the size of the job. Those jobs that cannot be completed within the target time are addressed through the lower "percent in spec" target.

As preventive maintenance work orders do have an impact on customer downtime, they should be included in the measure where possible. If, however, inclusion of these work orders creates an inaccurate portrayal of overall cycle time due to the process used (i.e. all work orders are opened/invoice at the beginning of the month and the repair time cannot be accurately isolated), these work orders should be excluded. Work orders in North America created using the Preventive Maintenance module will be excluded until a more accurate mechanism to isolate the cycle time is devised.

What work orders should be excluded from the RECT measure?

■ **Engine rebuilds.** It is often the case with these types of repairs that a swing engine has been installed and the customer has his/her equipment back in service, with this work order being

used to track the cost of engine rebuild. These types of work orders are not included, but the work order to swing the engine would be included, as this would be customer downtime.

■ **Re-Spec work orders.**   These are work orders where an engine or component is pulled from stock and modified in some way to suit a particular customer need. As this work is done in advance of installation with the customer, it does not affect customer downtime and is not included.

■ **Non-Cummins work orders.**   The RECT program is focused on Cummins repairs across all Cummins business units (i.e. engine business, power generation business, etc.). It is not attempting to address any non-Cummins business you may have. Therefore, to the extent that the repair locations data can be filtered to exclude these repairs, they should be excluded from the measure (though we would emphasize that managing this other work toward similar standards is good for the repair location's business).

Reporting Formula

$$\text{RECT InSpec Performance} = \frac{\text{Count of RECT InSpec Repairs}}{\text{Total Repairs}}$$

Example:

Total number of repairs within RECT specification for a period = 205

Total Number of repairs for same period = 287

RECT InSpec Performance = 205 / 287 = 71%

Goal/Aim

The goal is to maintain a Repair Event Cycle Time InSpec score that is $\geq$ 60% for all repair types.

How do I use it to drive my business?

A low RECT Inspec Performance measure (below 60%) generally means there are improvement opportunities within the steps of the repair. Time should be taken to examine the critical repair steps below to determine the underlying trend with why repair cycle times are out of specification within organization

>>   Critical Repair Steps:

1. *Customer Interview* — Are the appropriate questions being asked to ensure the customer's complaint is fully understood?

2. *Diagnosis* — Is the technician(s) following proper troubleshooting procedures and utilizing published troubleshooting trees?

3. *Billing* — Are the billing processes (Customer billable, Warranty, Policy, etc) hindering the repair event and causing the technician(s) to loose productive time waiting on repair authorization?

4. *Parts* — As a general rule, are needed parts to make the repair in stock or readily available if an order is placed?

5. *Repair* — Is the technician being scheduled appropriately to allow them to replace the failed component(s) with little to no work interruptions?

6. *Invoicing* — Is the service personnel able to close out all paper-in-process effectively on an hour to hour basis?

How Can I Make Improvements?

Fully aligning your Service Department with the QuickServe process will ensure a successful RECT InSpec measure.

Benefits

The Repair Event Cycle measures for minor and major repairs were established through over 600 customer interviews. Keeping the RECT within the specified limit for both minor and major repairs will mean your branch is operating in line with the customer's expectations. Delivering service within your customer's expectations will lead to improved customer satisfaction, which is correlated with increased business to the Service Department.

Easy Steps to Get Started with Key Performance Indicators

Now that we have defined each of the major Service KPIs — let's discuss how to get your team started and using them.

1. *Ensure your Service team understands the definitions, calculations, goals/aims, and targets of each of the above Service KPI's* — These KPIs provide "the story" on how well the QuickServe process in being executed and the overall operations / profitability of your service locations.

2. *Availability of the Data* — Another factor to consider is whether the data for each KPI is currently available. These KPI's allow you to accurately identify the performance of your service operation.

3. *Creation of a simple "dashboard"* — a place to track the data. This could be a shared Excel document or even some sort of IT solution.

4. *Discuss the results* — At least every month, meet with your Service team to review and understand what the KPIs are telling you about the branches service operations. The data will allow you to evaluate performance, identify benchmarks and set realistic and achievable targets for continuous improvement. Dig down to analyze the KPIs' for your planning efforts. Remember, these KPIs are story tellers, it is up to the QuickServe Leaders and QuickServe Champions to create some corrective actions to improve these measures.

5. *KPI's should be used as management tools* — A clear understanding of how these KPIs are used, how improvement opportunities are developed, and consequences for deteriorating performance should all be clearly mapped out.

6. *Develop a high level plan for reporting* — Publishing and reporting all of theseKPIs is critical to monitoring progress. Formats for reports should be customized by role and function so that Senior Management will see a summary view while the Branch and Service Managers would have a much richer set of detailed metrics. Consideration should be given to the mix between dashboards, scorecards and detailed reports for this analysis.

7. *Develop a cascading plan* — Each level of the organization needs to understand how their operations support the overall strategic goals. Cascading the KPIs clearly describes their contributions and their opportunities for improvement.

8. *Outline for continuous improvement activities* — A continuous improvement process allows the KPIs to be used to identify where focus should be placed to enhance performance on the QuickServe process.

KPI's are a useful tool to allow you to diagnose strengths and weaknesses in your QuickServe process execution, make strategic decisions and ensure that the branch is heading in the right direction in terms of customer loyalty and service profitability. Don't forget: the real value of the KPIs is in the discussion of KPI results with the Service team, not the numbers themselves. The idea is to have our service staff work only on meaningful jobs and eliminate non-valued added activities.

The main benefit of keeping tabs on your KPI's is that it keeps your entire Service team working toward the common goal of having a robust and consistent service process.

Would you be concerned if you came in one day and found that 50% of the parts you had purchased from Cummins were gone, but you had not sold them? Now, let's try this same question with Technician Labor Hours: Would you be concerned if you found that 50% of your Technician labor hours that you purchased were gone, but you had not sold them? An hour of a Technician's time is the most perishable thing we deal with. We can't save it, store it or bank it. Either we use it productively at the very second it becomes available or it's gone forever.

The process of managing our service labor begins with knowing the total annual hours available to Technicians to devote to wrench-turning billable activities. While Technicians are typically paid for 2,080 hours (52 weeks x 40 hours per week) per year, exclusive of overtime, they are clearly not available to work on billable jobs for this number of hours. Holidays, vacation, sick days (as well as other leave time) must be deducted to arrive at the number of hours a Technician is actually at work and available to work on productive jobs. Then, additional hours must be deducted to account for the time a Technician is at work, but occupied with activities other than turning wrenches, such as: shop meetings, technician training, shop cleanup, internal non-billable jobs, etc. The result of this calculation for all Technicians is the number of productive hours a distributor's service operations has available.

Other factors that impact labor recovery costs and profitability include: Technician training and skill level, lack of direction (Technician to Supervisor ratio high), Technicians waiting for assignments, parts, or tools between repairs, incorrect accounting for hours of Supervisors as available hours and shop considerations (e.g. facility location, size, layout, condition, equipment and tooling).

Organizations that do not actively manage the reporting of their service labor tend to "lose" billable hours during the year. A lack of reporting has consequences for both service business management and cost recovery. Given the impact of your labor in your service operation, your QuickServe Champions have been trained on the following Service KPIs:

1. T/B Ratio
2. Labor Utilization
3. Productivity
4. Billing Efficiency
5. Work in Progress
6. Paper in Process

These indicators will help QuickServe Champions and QuickServe Process Leaders train their branches on how to manage one of most important service assets: Our Cummins Technicians.

NPS, QuickServe Customer Meter and RTCM

>> Net Promoter System (NPS)

The Net Promoter System, or NPS®, is the standard process used in Cummins to measure, understand, and improve customer loyalty.

The measurement is based on the answer to one simple question *"How likely are you to recommend Cummins to a business associate or colleague?"* Customers respond on a 0-to-10 point rating scale and are divided into three categories: Promoters, Passives and Detractors. The definitions for each of these categories are as follows:

- *Promoters* — Promoters give a score of 9 — 10 and are typically happy or very satisfied with the service received during the service event. Promoters create advocacy as they feel strongly that they are receiving value.

- *Passives* — Passives give a score of 7-8 and are typically unimpressed, but not dissatisfied with the service received during the service event. Passives may switch for convenience or a more competitive offer. Passives may also be easily swayed by other factors such as pricing.

- *Detractors* — Detractors give scores ranging from 0-6 and are typically unhappy or dissatisfied due to a poor experience received during the service event. Detractors typically spread negative "word-of-mouth" and switch to competition.
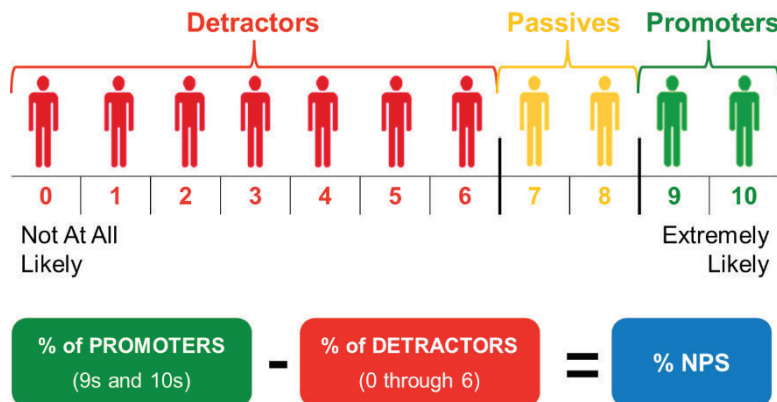
The NPS process is much more than just a score. It is a closed loop process that involves evaluation and action based on the customer feedback. This information is used to drive improvements throughout the organization. These improvements are the key to creating excellent customer experiences that drive growth and enable our customer's success.

| Excellent Customer Experiences | Loyal Customers | Promoters |
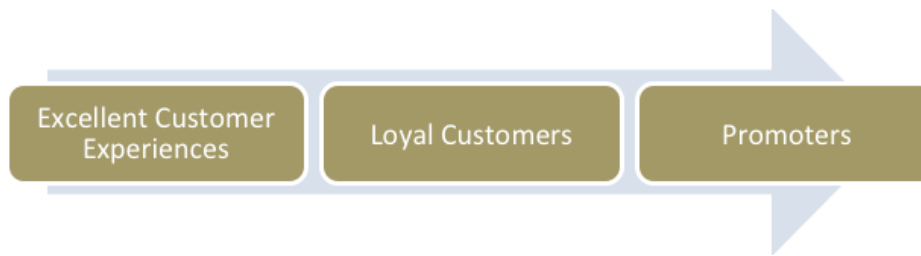
All Cummins businesses use the NPS process as the primary methodology to measure and improve the customer experience.

NPS is a powerful metric which allow us to evaluate the customers perception of the service event at the transactional level. If the customers feel that we are making them a priority, they will be promoters of the brand resulting in customers for life. More detailed information about NPS can be found on the Cummins Net Promoter System Community.
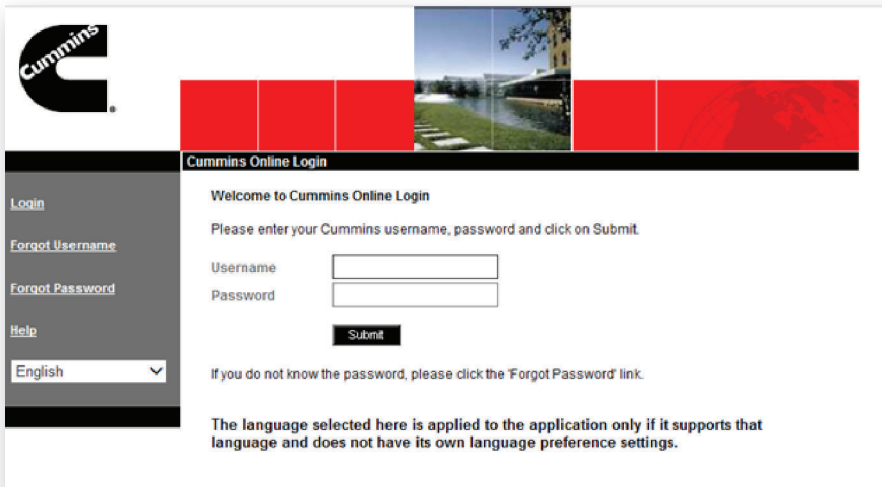
>> QuickServe Customer Meter

Keep in mind, as you follow each step in our QuickServe process, our performance will be measured in terms of our customer's experience. One way we measure how we are doing from the customer's perspective comes from the QuickServe Customer Meter. The QuickServe Customer Meter is a 5 survey questionnaire asked at the end of the transactional NPS question. Each of the five questions represent key milestones in the QuickServe process during a service event. The QuickServe Customer Meter tells us if our customers are "feeling" the QuickServe process. The QuickServe Customer Meter requires a simple Yes or No answer. The QuickServe Customer Meter is an effective way to identify the customer's perspective on what QuickServe steps were executed or missed during the service event. This allows us to identify areas in need of focus and develop proper corrective actions that can be put in place. The questions are:

1A. Were we able to start the repair at the time you requested? Y/N (If yes, proceed to 2, it answered No, proceed to question 1B).

1B. Did we begin the repair at the scheduled time? Y/N (International locations only).

2. Were you provided with an estimate or told how much the repair would cost before the repair work has started? Y/N If answered Y, proceed to question 3. If answered N, proceed to question 4 (if the response suggests that the repair was warranty; then, count answer as Y).

3. Was your invoice amount equal to or less than the price you were told for the repair? Y/N

4. Did we complete the repair when promised?

5. Were you provided with status updates throughout the repair?

Through 6 Sigma, a correlation has been proven that high percentages of Yes in the QuickServe Customer Meter correlates to higher percentage in NPS. For example, we know that when a customer answers yes to question 5 (*"Were you provided to status updates throughout the repair?"*), they also very often provide a higher NPS score as well. Understandably, after all, it is hard for a customer to give a high NPS score if they were not informed during the repair event.

How is the QuickServe Customer Meter Calculated?

As mentioned previously, the QuickServe Customer Meter can be found in the Allegiance website (https://www.allegiancetech.com/v7/App/Dashboard/Default.aspx) with CMI Username and WWID:

The QuickServe Meter is simply the summation of all of the questions answered "Yes" divided by the total number of respondents (excluding the N/A responses). For example, in the attached results from Allegiance (the database where NPS information is reported), there were 130 responses to "Yes" and divided by 145 total respondents (163 — 18) equates to a QuickServe Customer Meter of 89%.

This calculation can be done at a branch, distributor and even regional level. Later on this chapter, we will be explaining how to pull this data from the Allegiance system.

What are the Optimal QuickServe Customer Meter Targets?

The goal of the QuickServe Customer Meter Targets is to achieve a **consistent execution of the QuickServe Process** across all Cummins distribution network. There are actually two scores for the QuickServe Customer Meter:

a percentage and a color. The percentage is calculated at the distributor level while the color is calculated at a branch level.

The formula for the percentage score is the total number of all questions answered "Yes" for all branches of the distributor divided by the number of all questions asked for all branches minus all N/A responses for all branches for the distributor.

The color code for the distributor score is determined by scoring each branch individually: total number of questions answered "Yes" for the branch, divided by the total number of questions asked minus all N/A's for the branch. The color code for each branch is determined by these thresholds:

- Green = All branches at a distributor are 90% or above

- Yellow = At least one branch at a distributor resulted on a score between 89% and 70%

- Red = At least one branch at a distributor resulted on a score less than 69%

The color score for the overall Distributor color represents the color of whatever the lowest scoring branch color is for the distributor. Given this scoring, it is possible to have a distributor score of 92% and still be red due to a low performing branch. Keep in mind that the main purpose of this target is to drive consistent execution of the QuickServe process regardless of location.

Your Functional Excellence Regional Leader will be sharing a report across his/her region that shows where each distributor stands in regards this metric. It is very important for the Regional QuickServe Champion to hold monthly discussions to discuss this metric with each of his/her QuickServe Process Leaders. As discussed earlier, the QuickServe Customer Meter is feedback directly from the customer which shows us how well the QuickServe process is being "felt" by our customers during service events and where any improvement opportunities may be.

Attached is a sample report that shows the results of a group of distributors in a region from 2013 up to second quarter of 2014. It is important to identify which branches are pulling a red color for the overall distributor score so a deeper analysis can be conducted on the branch or branches not performing at the optimum level. The QuickServe Process Leader then, reviews the results on each question so a tailor made action plan can be put together for that specific branch.

A proper follow up of that action plan at the local level must be done to ensure that the improvements are taking place. The attached report will also reflect if there is improvement over time. As an example, notice how Cummins Antartida was able to pull all of their branches to a yellow performance level after action plans were created and monitored in 2013. Let's keep in mind that creating functional excellence is a journey and not a destination, and the customer is the only one who can tell us whether we are on the right path to legendary service.

KPI Dashboard — QuickServe Customer Meter

Did Customers experience the QuickServe Process?

RED: At least one branch less than 65% YELLOW: At least one branch 65% - 80%
GREEN: ALL branches 90% or greater

Distributor Name	Number of Branches	2013												2014					
		Q1			Q2			Q3			Q4			Q1			Q2		
		J	F	M	A	M	J	J	A	S	O	N	D	J	F	M	A	M	J
Cummins Antartida	24	78%	72%	74%	83%	76%	75%	81%	85%	83%	78%	81%	83%	82%	77%	80%	86%	88%	
Cummins Bahamas	2		88%	75%	90%	88%	68%	95%	46%	71%	76%	77%	82%	86%	88%	90%	82%	86%	
Cummins Atlantis	10	82%	78%	77%	78%	76%	70%	65%	72%	79%	75%	77%	77%	70%	74%	96%	84%	84%	
Cummins Montercarlo	2	74%	90%	75%	77%	85%	89%	81%	80%		88%	80%		40%	38%	90%	94%	100%	
Cummins Elbonia	2		100%	100%	100%	100%	100%	90%			86%	77%	100%	78%	93%	83%	98%	100%	

>> Repair Timeliness Customer Measure (RTCM)

Implemented in 2014 globally, a sixth question was introduced to gauge the level of responsiveness by the service location experienced by the customer. The sixth question is: *"Given the nature of the repair, did the time it take to complete the repair meet your expectations?"* Similar to the QuickServe Customer Meter, the answer is a simple Yes or No. This metric is essentially Repair Event Cycle Time (RECT) but from a customers' perspective.

Using the Sixth question gives each location a better view to the reality of our customer's perception in terms of responsiveness which offers the following advantages:

- The question is judged by customers from their perspective.

- The question is customer based and not system based.

- The question is not able to be manipulated or cheatable, the response comes directly from the customer.

- The question accounts for different expectations amongst varying market segments.

- The measure also accounts for scope of the repair.

This 6th question represents cycle time and it is not "A PROCESS STEP" within the QuickServe process, in other words, RTCM is the end result of the service experience. This metric should not be confused with the QuickServe Customer Meter and that is why it is a separate unique question in Allegiance.

How is Repair Timeliness Customer Measure (RTCM) Calculated? (International Locations)

RTCM is calculated in a similar way as the QuickServe Customer Meter in which the addition of all "Yes" responses divided by the total number of respondents (excluding the N/A responses) results on the RTCM percentage score. For example, attached are the results to that question (Time to Complete Meets Your Expectations) for a given region where the total number of "Yes" are 643 out of a total population of responses of 682 (710-28). Thus, the RTCM result for this example is 94%.

63. Time to Complete Meets Your Expectations

Show all answers

Answers	Count
Yes (1)	643
No (0)	39
N/A (0)	28
Total Responses	**710**

What is the RTCM Optimal Level for International?

From a Corporate perspective, Cummins DBU measures this metric at a distributor level, where a minimum sample size of 30 surveys is required (all branches are included as part of the total number of surveys) to get a result on this metric. The following are the targets of this metric:

- Green = RTCM score of 90% or above

- Yellow = RTCM score between 80% and 89%

- Red = RTCM score of 79% and below

Location	Total Number of Surveys	Score
Cummins Olympus	114	92%
Cummins Mesopotamia	80	85%
Cummins Babilon	109	92%
Cummins Atlantis	5	N/A

For example, attached are the results of 4 distributors in a given region:

From the table above, we can observe that four distributors were able to pull a score due to a larger sample size that surpassed the minimum requirement of 30. However, due to the low sample size for Cummins Atlantis, a score for RTCM was not calculated as a definite conclusion cannot be reached with such a low sample size. It is highly recommended to work with the regional NPS Champion and local distributor management to increase the survey sample size to at least meet the minimum requirement to be able to draw a better conclusion in regards to this responsiveness metric. Keep in mind that there is value on knowing how our customers feel about the service we provide in order to ensure repeat business and customers for life.

It is very important for QuickServe Process Leaders to monitor this metric on a branch basis. Even if the sample size is small, it is important to understand the reasons why a negative response was given to the survey so the proper required improvements are put in place.

How is RTCM Calculated in North America?

RTCM in North America is calculated at the branch level for each distributor. At the branch level, the way to calculate RTCM remains in North America is the same as International, which is taking the total sum of customers who answer "Yes" to the sixth question divided by the total number of respondents (excluding N/A responses).

What is the RTCM Optimal Level for North America?

Due to the multiple branches in the North American Distribution, a different approach was taken to accommodate the effect of small branches in the overall distributor score. After some analysis was done with a large sample size of 2013 data, the following targets were set and agreed to be part of the North America Balanced Score Card.

The Distributor is measured by the percent of their branches that are classified as "In Spec". "In Spec" is defined as any branch that scored an equal or greater than 89% on the sixth question. Based on that, the following breaks were set:

- Green = 75% or greater of branches in the distributor are "In Spec"

- Yellow = 74 - 65% of branches in the distributor are "In Spec"

- Red = Less than 65% of branches in the distributor are "In Spec"

QuickServe Playbook

Non Applicable Answers

As part of the QuickServe Customer Meter and RTCM questions, a N/A (non-applicable) option is part of the survey. There are 3 main reasons on why a N/A option was introduced in the survey:

1. If the customer refuses to complete the additional QuickServe questions - N/A will need to be placed on all of the QuickServe questions.

2. If the customer starts answering the additional QuickServe questions, but then refuses to answer the remaining questions - N/A will need to be placed on as the answer to the unanswered questions - as well as any remaining questions.

3. If the customer begins answering one (or more) of the questions saying "they were not involved during this process pertaining to the question". (i.e. not a single person at from the customer's site to be able to witness the entire chain of a service event; and therefore, offer any feedback or is unsure if something happened or not) - N/A will need to be placed on as the answer to uncertain questions

In the past, every time the customer could not respond in a "Yes/No" manner or did not complete the survey, then it was recorded automatically as "No" in the survey. This approach created an issue with the correct score in the customer meter.

It is worth mentioning that this "N/A" option is running in the background, meaning that it is not a choice for the customer but rather an option for Ronin (external provider who conducts the surveys with the customers) to properly record those instances.

As this data is reviewed by the Regional Champion and/or Local QuickServe Process Leader it is important to understand those locations with a high number of "N/A" responses as this might indicate that the wrong person is being surveyed. Or, routinely the person is being entered on the work order as the contact person. If you recall from your QuickServe certification training (Step 1 of the process), once the Service Advisor and/or Service Writer opens up the initial work order, it is critical to know the correct contact that needs to be communicated with throughout the service event. Equally important is that the correct phone number is entered as this individual could potentially get surveyed as part of the NPS transactional process.

As discussed in the sections about calculating the QuickServe Customer Meter and RTCM measures, in order to normalize the "N/A" answers, the total number of "N/A" answers need to be subtracted from the total number of responses. The NPS Allegiance System will eventually normalize this automatically in the future; until then, a manual operation to normalize these N/A responses is required to calculate the final QuickServe Customer Meter and RTCM results. Cummins DBU Corporate will communicate when this is automatic normalization is enabled in the Allegiance system.

## >> NPS and QuickServe Customer Meter Predictors

The Allegiance systems allows for users to make more in depth analysis for each of the QuickServe Customer Meter questions and the predicted NPS result. This features provides more data on the impact that each of the QuickServe Meter Questions has on the overall NPS score.

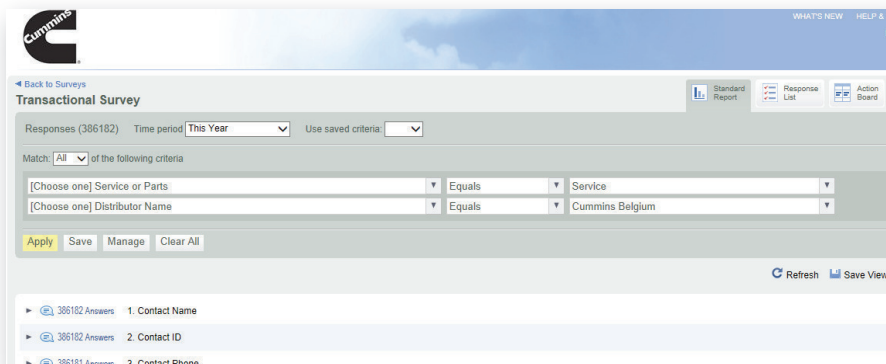The following are a set of instructions on how to use this feature in Allegiance:

1. Log onto Allegiance website (https://www.allegiancetech.com/v7/App/Dashboard/Default.aspx) with CMI Username and WWID:
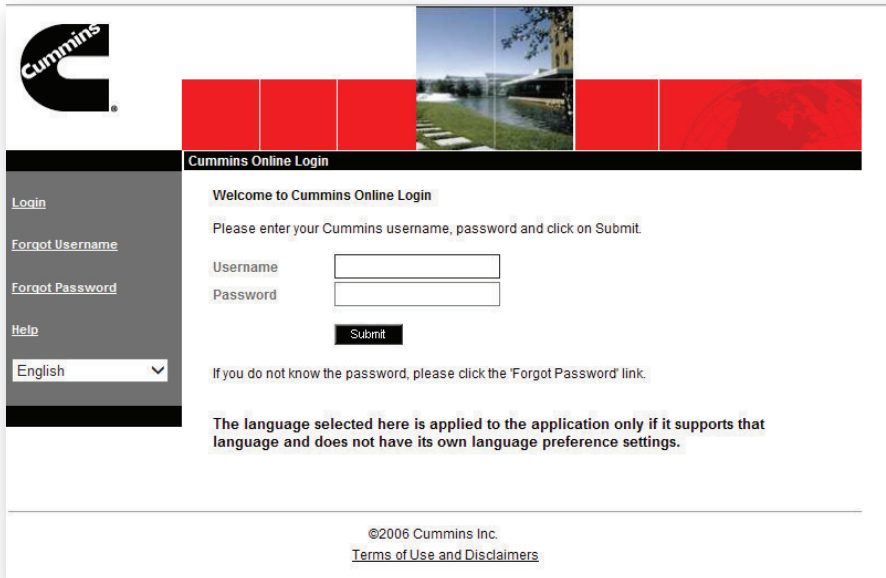
2. Click the "surveys" tab from your dashboard.
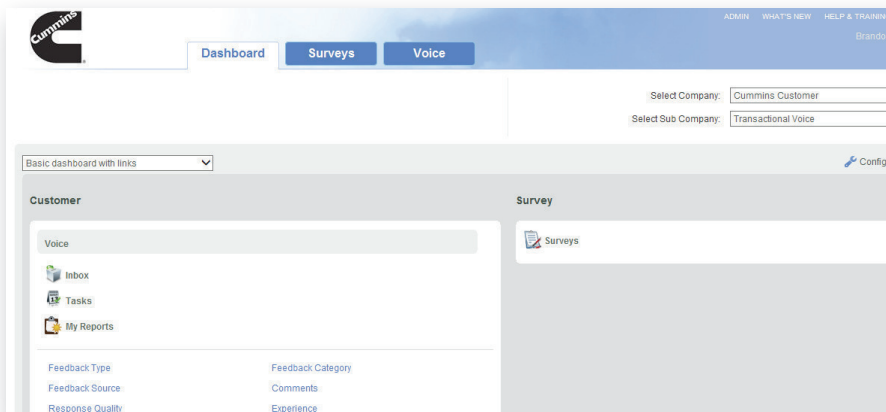
3. Open the Transactional Survey.
4. **Add Filters:** Time Period, Service and Distributor Name.
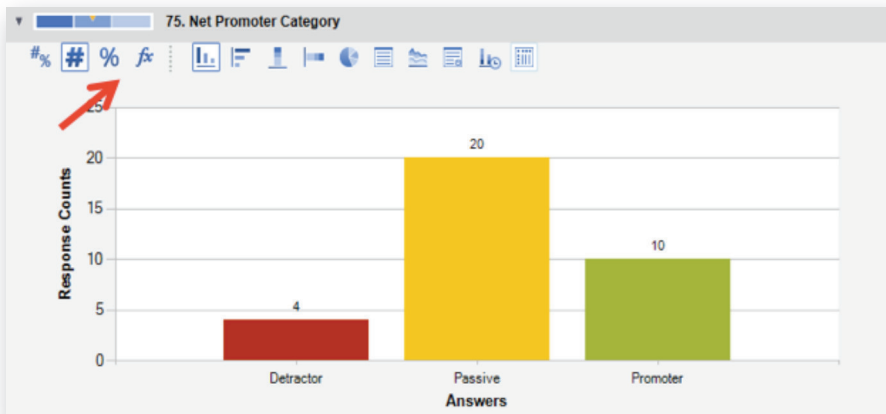

QuickServe Playbook

Note: North American users MUST add one additional Filter: Select Order Source Type & ensure that must EQUAL: WO
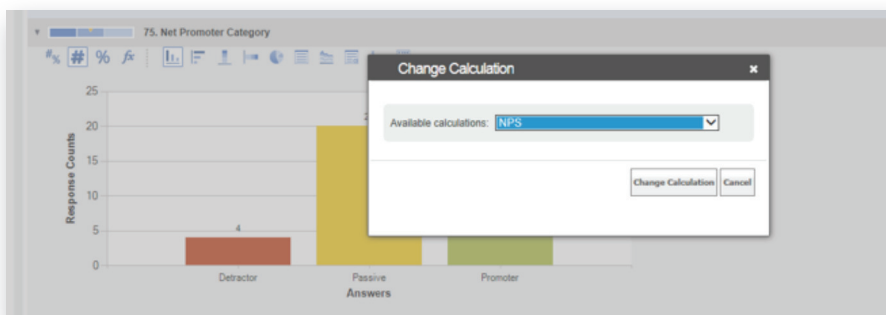

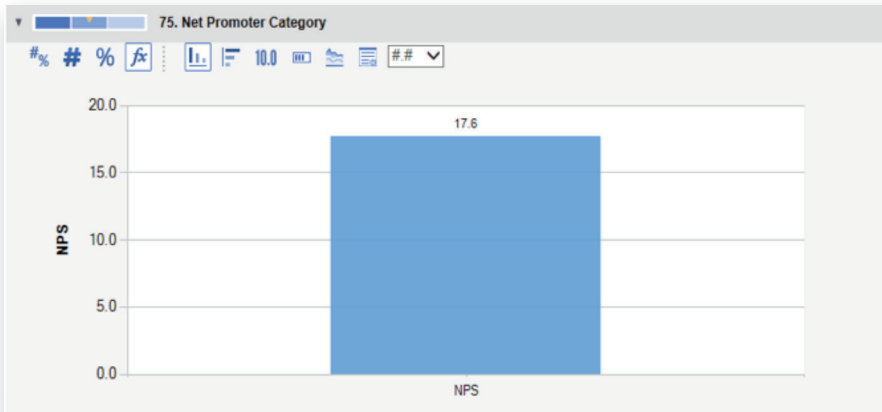5. Scroll to the very bottom to see the baseline value for NPS.
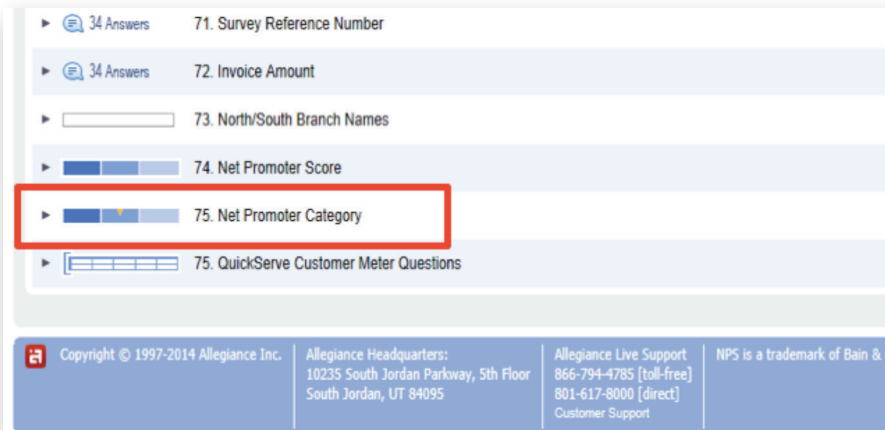
6. This will show the NPS survey responses by NPS categories: detractors, passive, promoters. Then click F(X) to begin the analysis on predicted NPS score.
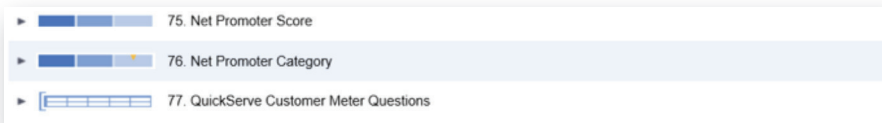

7. Change calculation in drop box to read NPS.

8. This will give you the baseline NPS.

9. Proceed to category 77 Open the QS Customer Meter tab (#75) to see the overview of your results.

10. The overall result of each of the questions will be displayed. As mentioned previously, the table shows the rating on each of the question of the QuickServe Customer Meter in order to identify major gaps in the process so the corrective actions can be put in place.

75. QuickServe Customer Meter Questions

		Choose one			
	Yes	No	N/A	Total Respondents	Mean
Started Repair When Requested	31	3	0	34	0.9
	91.2%	8.8%	0.0%		
Started Repair When Scheduled	2	1	0	3	0.7
	66.7%	33.3%	0.0%		
Estimate Provided	24	2	8	34	0.7
	70.6%	5.9%	23.5%		
Invoice Equal or Less Than Estimate	17	4	3	24	0.7
	70.8%	16.7%	12.5%		
Completed Repair When Promised	29	2	3	34	0.9
	85.3%	5.9%	8.8%		
Provided Status Updates During Repair	27	3	4	34	0.8
	79.4%	8.8%	11.8%		
Total	130	15	18	163	0.8

11. If you scroll up each of the questions of the QuickServe Customer Meter and RTCM is listed as an individual category. It is on this section where the predictor analysis by question can be done.
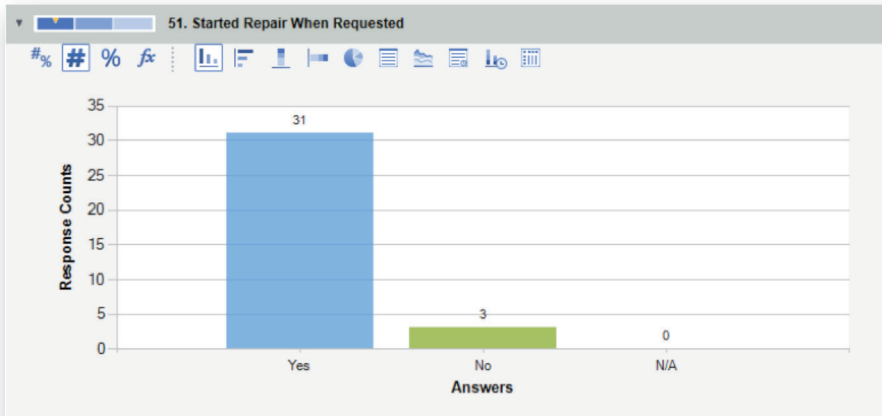

12. Open each of the QuickServe Customer Meter individually.
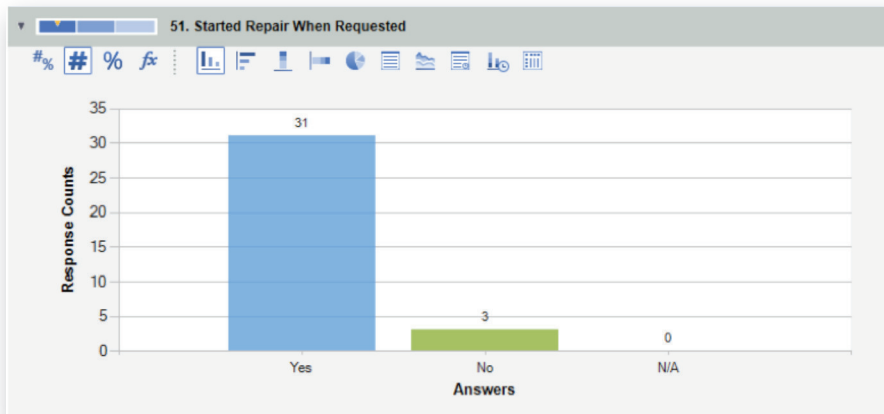
13. Click fx to look at the predicted NPS by each question.

14. Change calculation to: NPS of another Question.

Select: Net Promoter Category

Click: Change Calculation

15. This will show the predicted NPS score for each response: Yes, No, N/A. Let's take the example below, this shows that for people who responded "no" to this particular question, the predicted NPS would had been -33%. On the other hand, for those who responded "yes", the predicted NPS would had been 22.6%. This particular question shows the criticality on making sure that customers feel that we are responding to his/her request for service in a timely manner. Analysis can be done on each of the questions in order to understand the impact of each question on the predicted NPS.
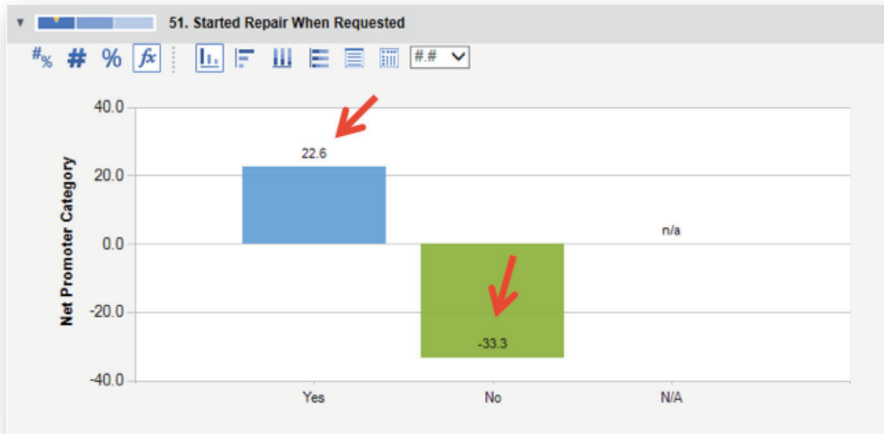
>> Optimizing QuickServe

As we look for ways to increase customer loyalty, QuickServe is our foundation to deliver dependable service. By plotting QSCM performance against importance to customer (likelihood to recommend) we generated a graph where each point of the 5 questions and RTCM represents the score of a single touch-point against its correlation with customer loyalty.
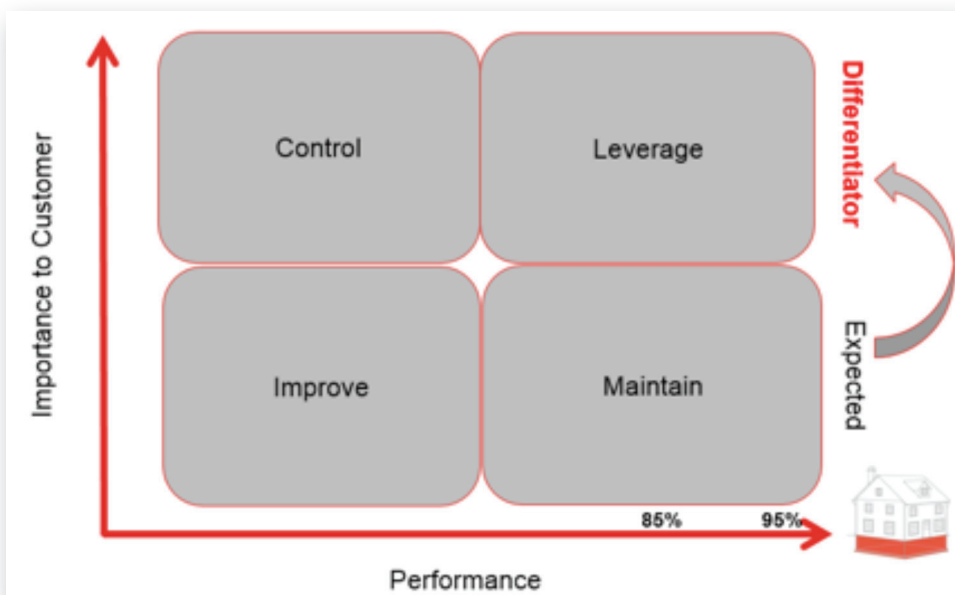
Explanation of Quadrants

■ A variable appearing in the top-right quadrant of the graph is scoring well, and correlates highly with importance to customer loyalty. In a nutshell, actions are executed consistently and extremely well, and are also have a high correlation with the "likelihood to recommend" question. Steps of the process located in this particular quadrant should be leveraged by the distributor, as they are becoming a differentiator for the customer. These are the actions that the customer perceived to be legendary and therefore difficult to replicate by the competition. That is why, this quadrant is labeled "leverage".

■ Bottom right is scoring well, yet there is not a strong correlation with the "likelihood to recommend" question. The reason is because these are behaviors or actions expected by the customer. This is particular true in regions where the competition is at par with the level of service provided from our network. Over the last 2 years, there have been competitors who have launched similar QuickServe programs in North America and Australia. Continued focus should always be placed on the QuickServe Process to ensure steady and sustained improvement. In many instances, the QuickServe process and how well we execute it, is the only differentiator between us and our competition.

■ Bottom left tell us that the foundational process needs to be improved. Corrective actions should be put in place to improve the QuickServe Process until it has migrated to a "maintained" level. Remember that the questions on the QSCM and the RTCM question is a "yes" or "no" answer. So anything in this quadrant tells you that these actions are not being done consistently.

■ Top left, High Priority steps that correlate highly with likelihood to recommend, but are scoring or being executed poorly. Focus corrective actions here.

Based on global QuickServe Customer Meter, the average score is 85%, which indicates that we are on the "maintain" quadrant. As a next step, we need to keep working towards executing the process to at least a 95% level which means consistent execution of the process. A sustained and well executed QuickServe Process will evolve to become a Differentiator. What does it mean to be a Differentiator: convenience, easy to do business with (how much effort did the customer put on the repair?), and being a consultant to the customer among other things.

Clear Differentiator

By using the QuickServe process effectively we can, as a group, consistently do a great job of communicating with our customers. By remembering that our Customer is the boss, we can use this process to understand that effective communications begins and end with them.

Communication with the customer continues to be a clear area of opportunity that when done properly creates a competitive advantage. Our collective goal should always be: To be as good, if not better, than any or all of our competitors in this important category.

Remember, when communicating with our customers during the initial interview, don't forget to ask: *"At what number can we contact you concerning the status of your repair?"*

Customer Comments Count, Every Day

At Cummins, we want to make sure that every customer has a quality service experience. Every time.

A big part of our QuickServe process is communicating and setting expectations with the customer.

What our customers have to say to us about their service needs is very important to us. That's why we must listen carefully to what they have to say. We must make every effort to communicate clearly and effectively with every customer. On the next few pages there are tips to help improve your customer communications — at every contact point in the service process.

Improve Your Communication Skills

What is communication? Communication is an exchange of information, ideas or needs between two individuals. An exchange or communication demands that we listen and speak skillfully, not just talk mindlessly. Interacting with anxious, angry, or frustrated people can be even more difficult, because it is human nature to get pulled into such emotions. Yet don't despair or resign yourself to a lifetime of miscommunication internally or with customers! Good communicators can be formed as well as born.

The following is a set of ideas and hints that will help you fine tune your communication skills. Each point is designed to help you address different problems or situations that you may encounter when dealing directly with your customer, either on the phone or in person.

- Don't take another person's reaction or anger personally, even if they lash out at you in what seems a personal manner. Another person's mood or response is more likely about their anxiety or frustration than it is about you as an individual. Take a deep breath and count to 10, and see it as a way of letting the other person vent before he is able to communicate what's really on his or her mind. Many people need to "blow off steam" before being able to reason clearly.

- You don't have to have all the answers. It's OK to say, "I don't know." If you want to find out, say so, then follow up to share your findings. Or you may decide to work on the problem together to find the answer. Providing an explanation of how, or where you will get the answer always helps. Also, providing a time of when you should have the answer helps as well.

- Respond (facts and feelings); don't react (feelings) e.g., "Tell me more about your concern" or "I understand your frustration" instead of "Hey, I'm just doing my job" or "It's not my job" (which is sure to cause more irritation). Share responsibility for any communication in which you're a participant, and realize that sometimes, maybe often, your own personal reactions may be causing your frustrations about communicating with others.

- Understand that people want to be heard more than they care about whether you agree with them. It's strange how many people complain about others not hearing them, yet they don't listen to others either! You can show that you're listening by giving someone your complete attention and saying things like:

  1. "Tell me more about your concern."
  2. "What is it about XXX that concerns you?"
  3. "Can you share a little bit about what led you to believe that?"

- Remember that what someone says and what we hear can be amazingly different! Our personal filters, assumptions, judgments, and beliefs can distort what we hear. Repeat back or summarize to ensure that you understand. Restate what you think you heard and ask:

- "Have I understood you correctly?"

- "It sounds to me like you are saying"

- "So, what you are telling me is"

If you find yourself responding emotionally to what someone said, say so, and ask for more information: "I may not be understanding you correctly, and I find myself taking what you said personally. What I thought you just said is XXX; is that what you meant?"

>> The QuickServe Vision
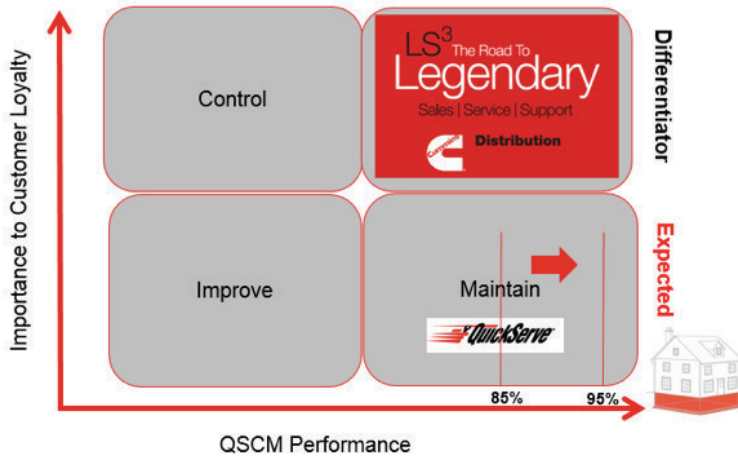
Being in the "Maintain" quadrant helps explain those locations with high QuickServe Customer Meter % and low NPS scores (High Performance, but not a strong correlation with their "likelihood to recommend"). The vision for QuickServe, is how can we get our QuickServe process to become a differentiator and drive Customer Loyalty?

The Allegiance system allows you to run the analytics to determine which quadrant each step of the QuickServe Customer Meter and RTCM will fall within. To do that, follow this simple step:

■ From the Transactional Survey — with all Filters still applied (filter on Service, Distributor Name and for North America filter source WO), click on the "Correlation Analysis tab" at the top.
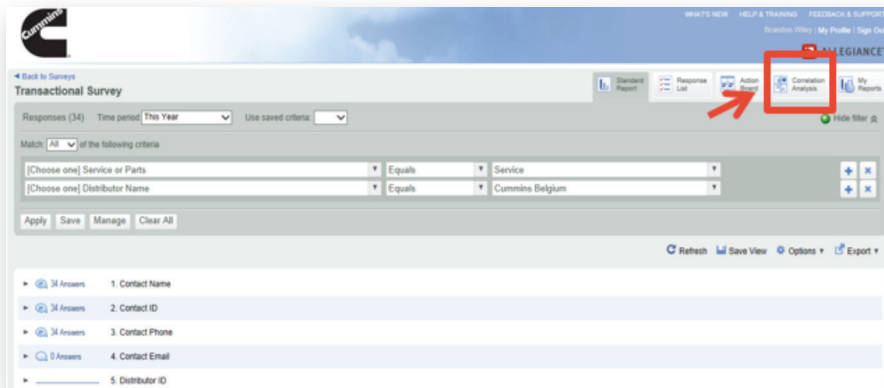
■ After clicking this tab, the overall result on each question will be arranged on each of the quadrants.

Importance Attribute : NPS   Performance Attribute Group : Default Group 1
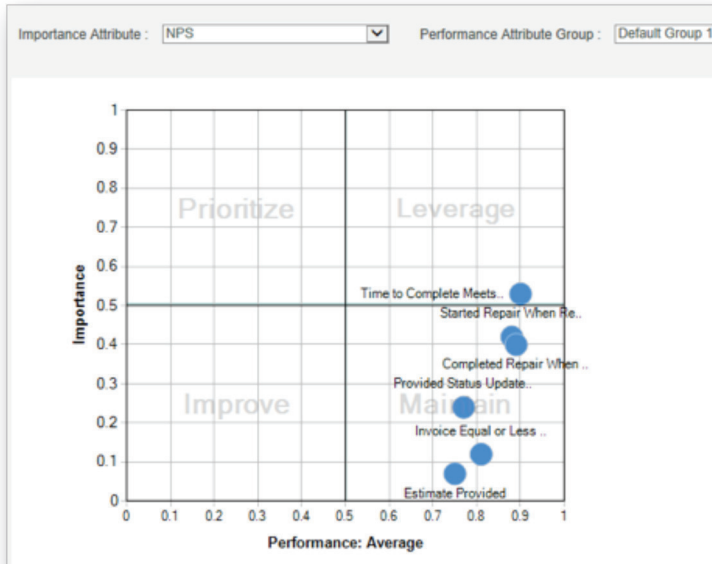
This is a Pearson's Correlation Analysis that measures the linear relationship between two variables. In other words, it is a 1 to 1 correlation analysis which does not take into account other variables. As previously discussed, the quadrant chart compares the derived importance of a key metric (dependent variable) to the performance of one or more drivers (independent variables.) As the name indicates, the chart is divided into four parts or quadrants. Each quadrant helps you to identify the action, if any that you need to take. Let's take the information above as an example.

The x-axis represents the average performance for each independent variable. In other words, it is the weighted average of the responses to the question(s). The table below the chart gives the actual variables. In the particular case presented on the table, the chart is telling us that: estimate provided, invoice equal or less and status updates are not being done consistently (less than 85%). The other three questions are being done beyond the 85% in which the questions "Completed When Promise" and "Time to Complete Meets Your Expectations" are done close to 90% of the time.

The y-axis represents the Importance or correlation coefficient for the key metric question. Where the performance average tells us where we are right now, the importance number helps us predict the future. It tells us which independent variables we should focus on increasing to have the largest impact on increasing the value of the key metric. In the example above, anything close to the 0.5 (Y-Axis) means that there is a strong correlation between that particular behavior and the predicted likelihood to recommend. So, Time to Complete Meets Your Expectations have a strong correlation and it is located in the "leverage" quadrant. The questions "Started the Repair when Request" and "Complete the Repair When Promised" are close to having a strong correlation with the "likelihood to recommend". Now, for the remaining questions at the bottom, those are actions expected by the customers and therefore, there is not a strong correlation with likelihood to recommend. From this particular case, we can see the strong correlation between RTCM and NPS as this is where the true competitive advantage lies (assuming that the other basics are in place). As an example from other industries, that is why Amazon is piloting drone shipping for immediate delivery, because in their market, the process to place the order, invoice, etc; is standard across the industry and expected by the customer, since similar retailers do the same process, but Amazon wants to be known to be the best on delivery to take the overall customer experience to a new level.

In summary, NPS, QuickServe Customer Meter and RTCM allows the QuickServe leaders to develop strategies around how to consistently provide service events that differentiate us from our competition in the eyes of the customer.

QuickServe Long Term Sustainability

Successful process execution and long term sustainability starts at the top of the organization. Total commitment from the Principal and/or General Manager must be acted upon in order for QuickServe to have value and credibility in the organization.

The Principal/General Manager must continually communicate both written and verbal support of the changes required to sustain the process. A recommended sustainability plan is outlined below:

>> Distributor Headquarters Plan

The plan at the headquarters level must be led by the Distributor QuickServe Process Champion and must contain the following elements:
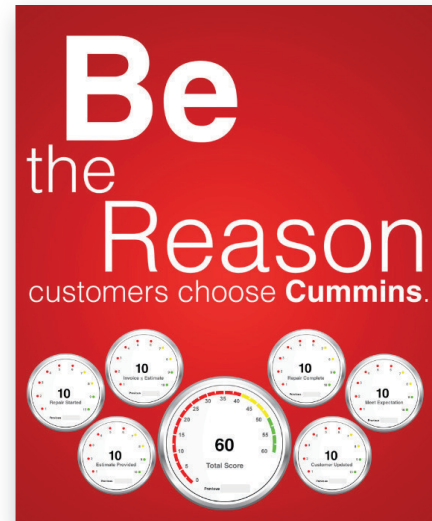
1. Identification of the process execution as a corporate initiative in the Distributor's Annual Operating Plan.
2. Setting of targets on each of the KPI metrics, including QuickServe Customer Meter and NPS.
3. Creation of an evaluation calendar to perform process audits for each of the branches.
4. Schedule of monthly branch process meetings, focused on reviewing the metrics and audit action plan progress.
5. Champion facility changes required for process optimization.
6. Creation of a monthly branch process execution scorecard and/or dashboard.
7. Ensure that all service administrative personnel have gone through the one-hour QuickServe Fundamentals e-training.
8. Plan to identify and train any non-QS Certified service personnel that requires qualification.

Example on how a distributor promotes process adherence and KPI targets.

>> Branch Plan

The Branch Plan is as follows:

1. Identification of the process execution as a branch initiative in the Distributor's Annual Operating Plan.
2. Clear Branch leadership supporting the process (includes the Branch Manager, Service and Parts Management).
3. Have service personnel identify the roadblocks on executing the process. Implement improvement plans for overcoming each of the identified process roadblocks.
4. Assigning responsibility to KPI process metrics.

5. Identification of process skill training, and any necessary QuickServe Qualification training requirements.

6. Creation and monthly publication of the KPI scorecard and/or dashboard.

7. Distributor QuickServe Process Champions to schedule branch visits until the process measures show improvement.

8. Revision of service process measures daily by Service Manager and QuickServe Process Champions.

>> Suggested Monthly Branch Agenda

Process implementation and embedment successes have used the following outline for a monthly branch agenda:

- Review Service and Parts Profit
- Review Labor Utilization
- Review WIP
- Review PIP
- Review Billing Efficiency
- Review T/B Ratio
- Review QSCM, RTCM and NPS
- Review Service Administration Efficiency:
- Total labor hours invoiced
- Total work orders processed
- Volume of parts sold through the shop and the margin
- Percent of warranty/policy filed

Finally, develop a Branch Action Plan to improve on the above service metrics. The action plan should document the potential roadblocks and a list of solutions to remove those barriers. Like any action plan, it should include who is responsible and the target dates for completion.

>> Recommendations on How to Improve on Each of the Metrics

As you review the above metrics on a frequent basis, keep in mind that these metrics will ultimately impact the customer, cash flow, employee efficiency, overtime payments (costs) and recovery rates among other aspects of the service business. Therefore, it is very important to understand the above indicators as they are story tellers of the current condition of the service business. As you coach your Service Manager, we have compiled some commentaries on how to improve on each of the major indicators.

QuickServe Customer Meter and NPS Performance Issues

Objectives:

1. To ensure that the customer feels the QuickServe Process.

2. Good communication with the customer during the service event. Being able to answer the basic questions:

   a. What is wrong with the product and why,

   b. How much is the repair going to be, and

   c. How long the repair is going to take.

3. Friendly, courteous and capable employees.
4. Follow up after the service event.

Below are some common issues with some guidelines on how to improve low scoring on QuickServe Customer Meter and/or NPS.

Common Issues	How to Improve
Not enough time to call the customer during the service event	Track Service Advisor efficiency: Number of work orders opened and invoiced, also, percent of warranty filed.
Not a good flow of information	Each Service Advisor must "own" the work order through the entire service event.
Not a good team work at the branch	Tie incentive programs for the service group to NPS and QuickServe Customer Meter results.
Low QuickServe Customer Meter/NPS	Analyze the results, by question and the overall predictor to NPS. Analyze verbatim responses and create action plans to remedy deficiency performance areas.
Service Advisor not following the QuickServe Process	CSA training on QuickServe, warranty and engine information tools.
Not analyzing the specific results to each of the QuickServe Customer Meter questions	Log into Alligance and analyze results by question to determine specific gaps in the process and develop an action plan with branch staff.

>> Billing Efficiency Performance Issues

Objective: To ensure that every Technician hour applied to a service billable job gets invoice.

The QuickServe Web Audit Tool is a great way to assess the frequency and accuracy that a given location is achieving with respect to quoting. As mentioned earlier, a quote is a fundamental piece of written communication during the service event as it states what is wrong and why, how much and how long the repair is going to take. An invoice is deemed to have "met the quote" if the invoiced amount is equal or less than the quoted amount.

Below are some common issues with some guidelines on how to improve low scoring on Billing Efficiency.

Common Issues	How to Improve
Is there sufficient staffing on Service Advisors?	Ensure that there is sufficient staffing of Service Advisors and at the proper ratio, to the number of Service Supervisors, Technicians, etc.
Are all service personnel qualified in the QuickServe Process?	Provide training to all service personnel in the QuickServe Process.
Are the Service Advisors adequately trained in Cummins SRTs?	Provide training and resources to allow proper application of SRT's.
Are diagnostic SRT's being added to the work order?	Ensure the Service Advisor adds diagnostic SRTs to the work order as soon as it is opened.
Does the process utilize a QuickServe Diagnostics Technician sufficiently trained and qualified in order to capture all applicable SRTs?	Assign a specific individual, with the highest skill levels, to diagnose the complaint. If desired, this position can be rotated on a regular, scheduled basis.

	Locate the Service Supervisor and a Parts Professional in the shop, adjacent to the Service Supervisor, in order to foster communication between Parts and Service and ensure that parts are being applied to 100% of the quotes.
Are repair options being discussed between the Service Supervisor and the QuickServe Diagnostics Technician? Are the parts being applied to the quote?	Locate the Service Supervisor and a Parts Professional in the shop, adjacent to the Service Supervisor, in order to foster communication between Parts and Service and ensure that parts are being applied to 100% of the quotes.
Are Service Advisors or Service Supervisors discussing the quotes with the customers (either in person or via phone call)	Require that customers sign all quotes or have the time and date applied to every quote that is communicated by phone. This applies to all quotes whether approved or declined.
People not motivated to follow the QuickServe Process	Consider an incentive program that will lead to enhanced quoting performance. Encourage, coach and champion the QuickServe Process…it works!

>> Labor Utilization Performance Issues

Objective: To determine high amounts of "unproductive time" so the proper corrections can be put in place. In other words, the idea is to use our technician force on customer billable jobs.

Below are some common issues with some guidelines on how to improve low scoring on Labor Utilization.

Common Issues	How to Improve
Waiting between jobs for next assignment	Improve job scheduling system to ensure next job is identified prior to close of current job. Incentive plan for shop Supervisors based on labor utilization.
No work available	Service marketing programs to improve volume. Establish training programs and stations that can be used by Technicians during gaps in available work. Reduce number of Technicians to match available work.
High proportion of internal jobs — not charged	Ensure internal jobs are accounted for and charge accordingly.
High proportion of building or equipment maintenance	Consider contracting this work out. Hire separate maintenance staff at a lower wage if volume is high enough.
Multiple trips made for field jobs that cannot be charged	Review causes for multiple trips (phone diagnosis, correct parts and tools in the truck, etc.)
No bays or service vehicle available	Are bays being used for storage rather than work areas? Consider adding vehicles or bays; analyze potential long term costs and returns.
Incorrect classification of Service Supervisors resulting in high levels of unproductive time reported	Engage with HR to record Service Supervisor hours in the correct administrative classification.

>> Technician Efficiency Issues

If a distributor location uses SRT hours versus actual hours to calculate Technician Efficiency, then below are some tips on how to improve on this measure.

Common Issues	How to Improve
Waiting time	Check the following and minimize these factors: Are Technicians waiting for parts while clocked on jobs? Are Technicians waiting for direction from Supervisors while clocked on jobs? Is Technical information readily available? Do Technicians remain clocked on jobs while waiting for customer repair direction? Do Technicians immediately clock off of jobs when completed?
Technician skill level	Conduct a confidential survey of Technicians to ask about desired training. Consider a graduated pay system (or bonus scheme) based upon demonstrated skill levels. Review your system for deciding which Technicians are assigned to which jobs. Match to their strengths.
Technician motivation	Understand issues affecting motivation on the job. Engage your Human Resources department if necessary. May consider an incentive program tied to Technician Efficiency.
Productivity tooling	Review access to power tools/shop air at work stations. How much time is required to "check out" and return special tools? Is special tooling "out of maintenance or repair" frequently of for extended periods? If so, identify which are frequently a problem and consider a second set.
Technician Qualification on the Product	Identify gaps on product certification training and work schedule Technicians for appropriate training.

>> WIP (Work in Progress) Performance Issues

Objective: To minimize the number of open work orders, so they can be closed and invoiced. This is a very important metric as it is directly related to cash flow.

Common Issues	Suggested Solutions
Job mix: large jobs (HHP rebuilds) can increase WIP	Expect higher WIP, but ensure jobs keep moving
Delays in completing work caused by: • Parts or labor shortages • Waiting for customer decisions • Waiting for subcontract work to be done	Run a weekly report to highlight jobs open more than xx days and highlight these to the Branch Manager. Isolate the cause and take action.

QuickServe Playbook

Business Volume	High WIP dollars may be OK. Look at days of WIP.
Lack of Service Documentation	Train Technicians to complete service reports promptly and correctly while capturing the 4 C's.
Lack of proper engine qualification on the products a distributor serve in territory	Ensure Technicians are trained and certified on all the Cummins engine models in their territory.
Not meeting completion repair times	Conduct Customer Service Advisor and Service Writer training to improve the completion of service requests in a given target time.
Shortage of technicians	Recruit more Technicians to better meet the service demands in a given market or territory. Usage of technician recruitment calculator required.
Extended time to get customer approvals	Improve communication with the customer and ensure good contacts and phone numbers have been established.
Extended repair time due to lack of parts	Service Parts Specialist reviews a Parts Back Order report on a timely manner and documents actions and necessary follow-ups to ensure parts arrive on time.
Service staff not properly communicating on repair times, customer expectations	Coach all Service Supervisors and Service Managers to ensure they understand their roles and what is expected of them. Reinforce the basics of what it takes to be a profitable and customer centric service provider.
Management of service technicians	Investigate Service Supervisor Capability –Service Supervisors should be able to react and solve problems quickly, while also being able to effectively manage their Technicians so repairs are not waiting for a qualified Technician to begin the work.

>> Paper in Process (PIP) Performance Issues

Objective: Invoice every work order as soon as it gets done. If all previous steps of the QuickServe Process were executed properly, then this step is a formality during the service event. Also, the idea is to maximize our cash flow to keep our service business running.

Recall that this is a measure of the time from last labor applied to invoice of completed service work orders, independent of type of sale (cash, credit and warranty). As you review this metric with the branch staff, keep in mind of these common issues and suggested solutions:

Common Issues	Suggested Solutions
Work order development and modification	Role clarity — who does what and when?
Quote development and timing	Educate staff to achieve a better understanding of process and interfaces.

Claim development and timing	Assess whether Service Advisor has the skills and tools to perform work.
Quality of quotes	Assess troubleshooting and quotation accuracy. Train or move people as needed.
Availability of standard job plans	Create and use standard quotes.
Excessive filling out of warranty claims	Track claims failure rate - % fist pass success rate and time it takes to submit the claim
Claims not being invoiced the same day	Track PIP that contains values over 5 days
End of month bunching	Invoice jobs daily as they are closed. Report out jobs over 5 days old to management.
Hardware location	PC/printers convenient to customer support work area.
Excessive invoice time due to lack of documentation	Train Service Advisor/Writer to complete the time sheet entries and close service jobs on time causing no delay in invoicing the customer.
Warranty claims not file on time	Ensure Customer Service Advisor completes and provides all required information in the Job Packet to file warranty claims.

>> Creating a Business Case for Additional Technician Headcount Requests

A tool, called the Technician Recruitment Calculator, was developed to help you create a business plan and validate the request from the branch for additional Technicians. This tool was the result of a Six Sigma project, led by Andrew Tallentyre from Cummins South Pacific with the purpose of assisting distributors to document a business case for their request for additional Technicians. This tool considers both Productivity and Financial measures to provide an evaluation, by assessing the current business environment against planned levels.

Important Note: The use of the Technician Recruitment Calculator has been incorporated into DBU Human Resources Policy for the Company Owned distributors when submitting their request for additional headcount.

The tool can be found on both the QuickServe Every Time Champion Portal and the QuickServe Community in Cummins Connect (click <u>here</u> to access).

Before adding Technicians, utilize and review the results of this calculator, as increasing Technicians in an inefficient shop (low Labor Utilization and Productivity) only increases overhead with minimal sales growth.

>> Final Recommendations

It is important for Service Managers and Supervisors to understand the profitability impact of keeping Technicians on productive work orders, closing and invoicing jobs, ensuring quality of quoting and executing the QuickServe Process in general.

As you look at these key performance indicators, keep in mind that they represent indicators of places to look for improvements in process, skills, and procedures. These indicators also are activity based values that provide insight into workflow efficiency, skill abilities and training needs. Finally, trends are more valuable than "snapshots" as in some cases, the service business is going to vary by seasons of the year or market conditions.

Quoting

Quoting is a critical part of the QuickServe process. Thus, we have dedicated a chapter to this subject. A proper quote has more impact on the service event than any other step in the service process. A valid quote serves to both provide information and set expectations to both the customer and others within the repair location for the service event. Let's begin by understanding the impact of quoting from the customer's point of view.

>> Do Quotes Have an Impact?

Service Mapping Example on the Impact of Providing a Quote on Every Service Event

Customer Experience	
Our Objectives	**Customer's Experience**
Every event quoted	I want to know my repair options and what was covered by warranty if applicable
	My repair location is reliable and there will be no surprises or issues with this service provider
Accurate quotes	I was told what failed, why, the cost and the time the repair would take to be completed
All quotes are communicated	My service provider wants me to be a partner in the repair
All quotes meet the final sale	When I received the invoiced, it matched the quote
	My service provider is professional and has integrity
All quotes have a quoted completion date and time	I can make alternative arrangements to keep my business running
All events are updated when necessary	I know who to call if I have any questions
Updated events are communicated	I was called when the completion date or repair plan changed beyond what was originally quoted
All events are scheduled	I was told the day the repair would be complete
	I was called when my unit was ready to pick up

As stated above, service quoting (the Quote) is considered one of the most critical components of the service event. NPS data shows that communication is one area that customers continually comment on as a major area of opportunity for improvement during the service event. A business process that includes a high percentage of quality repair quotes, and timely updates with customers, will produce increased revenue, higher percentage of satisfied customers, and a more efficient way to utilize resources and parts. Service quotes that include the following components and are presented in a timely, professional manner, provide the basis for repair plan scheduling and execution. They include:

- The steps that lead to identifying the root cause

- What the primary failure is and why it failed

- Repair work required to correct it

- What, if anything, will be covered by warranty or other means of support

- When (approximate date and time) will the repair be completed

- Expiration date of the quote

- What will be the final cost to the customer, if any

Both customer billable and warrantable repairs should be quoted. All service events, customer paid or warranty repairs require the same form of communication on all of the above components as they are critical to the needs of the customer to run their business.

The act of preparing a quality quote requires a team approach. An accurate quote requires the right people to gather proper diagnostic results, establish a plan to repair, identify and locate the appropriate parts, and schedule the event into the current work flow, and determine a potential date of completion based on technical resources and parts availability. The presentation of the quote should include all the above components in the order they are displayed. This provides a value for both the customer and the service location as the quote sets the expectations in terms of time and cost for the service event.

An integral element of quoting is determining method of payment, and/or current status of the customer's account. Even if the discussion is a confirmation of information in the business system. For account customers, always review to make sure the customer's information is still correct or the resulting repair isn't going to exceed the current credit levels in the customer's account. For cash customers always determine the method and confirmation of payment with the customer at the time of quote acceptance.

One other point about providing quotes is the act of doing the plan and presentation provides the customer choices. To allow customers the opportunity to decide whether or not to allow us to proceed is a great customer management tool. Not having the ability to make the decision and arguing about the price or repair approach at the end doesn't go well with creating customer preference and loyalty. The fear of losing the business should take a back seat to doing a quality plan and presentation. If a quote has been created with quality details and planning, and the presentation includes all the details and commitments that can be made, the customer should not be able to get a better plan from any other reputable Cummins service outlet. The key to this approach is planning it right with accurate details, EVERY TIME. Remember that trust is built on this.

In the event the customer informs you they do not require a quote, the act of planning out the details of the event will provide other benefits internally that will ultimately streamline the service event. Ultimately this will reduce downtime for the customer and improve profitability for you.

>> Quote Content

A complete service event quote content should meet the following criteria:

- Repair event detail must include the 4C's narratives, Complaint, Cause, Correction and Coverage

- Parts, labor and steps completed to diagnose the problem

- Labor charge and description that defines work to be completed

- Parts detail — pricing and items listed in detail

- Any miscellaneous charges, if applicable — freight, travel, shop, waste, etc.

- Applied coverage — new product warranty, extended warranty, policy support, etc.

- Promised date — proposed date and time the event will be completed based on parts availability and labor capacity. Completed means repairs, coverage, and invoicing is complete

- Quote expiration date — date on which the proposed quote will no longer be valid due to pricing, available capacity, coverage lapses, etc.

- Multiple repair options if applicable to the repair

Prior to presenting a quote for approval, the customer's credit status should be checked and compared to the amount of the new quote. If the new charge exceeds the available limits, the payment method must be discussed as part of the quote presentation to the customer representative.

>> Building a Valid Quote

The steps leading up to building a valid quote are critical to the outcome and quality of the quote produced. They include:

- Proper documentation of the complaint(s) from the customer interview

- Proper and accurate diagnostic procedures

- Accurate documentation of repair options, including labor and parts needs

- A true assessment of the access repair steps that should be included in the quoted price

- Determination of coverage based on the merits of failure/repair and warranty status of the product

The QuickServe Process requires a quote to be completed and presented prior to commencing with the final repair. For Mobile business, the service event starts with a quote for "show up and diagnostic" charges. Later, the quote may be updated with the repair details and reviewed with the appropriate customer contact.

In order to accomplish this in a timely manner, several participants (roles) must work together to gather the information for the plan. They include:

- **Service Advisor** — Provides accurate complaint details through the Customer Interview Wizard or Service Advisor Complaint Sheet. Schedules the event for diagnostics to start.

- **Diagnostic Technician** — Identifies the primary failure and repair details to provide a complete repair.

- **Service Supervisor** — Ensures proper diagnostic procedures were used and documented. Updates work order and completes data entry of the repair plan, coverage and required comments. The Supervisor marks the quote complete when it is ready for presentation to the customer and schedules the repair portion of the event upon quote acceptance.

- **Parts Support** — Obtains the required parts list from the Diagnostic Technician, enters parts list in the appropriate document, and completes research for unknown items and items that are not on hand to complete the event. Provides cost options for purchase of non-stock items or shipping of out of stock items. Provides date when all required parts will be on hand.

- **Repair Technician** — Provides updates to Service Supervisor immediately if repair requirements deviate from the repair plan outlined in quote.

Once the plan is completed, the Service Supervisor presents the quote to the customer for approval. The presentation should include the following details:

- Primary failure and why

- Any additional damage as a result of the failure

- All steps required to complete the repair

- Any coverage or assistance that might be offered to support the cost of the repair

- Any delays that may exist as a result of parts shortages and approximate date of arrival upon approval

- Final repair price

- Quote expiration date — recommend 24–48 hours

When the quote has been approved, it is accepted to the original diagnostic Work Order and selected for scheduling. A start and proposed completion date are created and communicated to the customer when the quote is delivered for final approval.

For some events it may be appropriate to provide multiple quote options for the customer to consider. These may include a more comprehensive repair, a reconditioned (Recon) engine, etc. The decision to approach an event in this manner will depend on the number of issues to be repaired and the customer's financial ability to cover all issues identified during diagnosis. Multiple issue repair events may need to be prioritized in an effort to accommodate what is critical to the life of the equipment and what the customer can afford.

There are several ways to provide the quote to the customer from a printed copy or via email. However, what it is important is to define what the customer's preferred delivery method is. It is also important to identify with the customer, who is the decision maker with the authority to approve or deny the quote. Establishing the correct contact names and contact numbers is critical so the proper review and approvals are done in a timely manner. Extending the approval time also extends the downtime for the customer. Limiting quote approval time is a key part of the quote presentation and timely completion of the event. Communication of the expiration date and time should be addressed during the presentation.

Quote structure contains the following values:

- **Diagnostic charge** — obtained from the original Work Order

- **Repair labor charge** — labor hours to complete the repair

- **Parts charge** — required parts to complete the repair

- **Miscellaneous charges** — mileage, freight, hazard, etc.

- **Coverage** — warranty or other support programs that might be applicable

- **Comments** — Complaint, Cause, Correction, Coverage

- **Quote expiration date** — recommend set to 24-48 hours.

The diagnostic and repair labor charge is determined by the Standard Repair Times (SRT) used in the planning process. There are four types of SRTs:

1. **Administrative**

    Supports paperwork, work area clean-up, moving units in and out of the shop or loading and unloading items from service trucks. For some applications such as recreational vehicles the time provided is increased to provide time to cover critical areas such as furniture, carpeting or other amenities that may be soiled as a result of the work that must be done. These SRT's are generally in group 00.

    They are either 00-901 (In-Shop), 902 (Mobile), 903 (Painting), 904 (Recreational Vehicle), depending on the nature of the event.

2. **Diagnostic**

    Supports those actions to test/investigate in an effort to determine the nature of the reported failure. These SRT's may be provided with a number of steps the Technician should follow to properly diagnose the condition. Generally these steps provide a standardized approach to diagnosing the condition starting with the least complex (visual inspection) to the most complex (use of QSOL troubleshooting trees or EDS). These SRT's are generally in group 00 or T/S (Troubleshoot). EDS will provide a list of applicable SRTs based on diagnostic procedures completed within the DSID. A summary of these SRTs can be found in the EDS DSID.

3. **Repair**

    Supports the actual repair event portion of the event. Generally, the repair plan, to be complete, should contain a number of repair SRT's to properly account for all the work that must be completed. The sum total of all the SRT labor hours in the plan becomes the labor charge.
    There are four categories of repair SRT's:

    - *Primary repair* — generally remove and replace components
    - *Access* — to move or remove items to gain access to the primary work area
    - *Clean and inspect for reuse* — for components critical to the performance of the product that will be reused in lieu of being replaced
    - *Miscellaneous* — supports work activity not supported by the other SRT's. (there is a 999 SRT with every group i.e. 06-999, 02-999)

4. **Travel**

    Supports the labor hours for purposes of traveling to and from a mobile work site. This SRT is found in group 99 (99-990).

Standard Repair Times, by their name, establish standard hours to complete the required tasks with the exception of miscellaneous and travel (also known as flex SRT's) which do not have standard hours. Flex SRT's assume the actual labor hours allocated to them by the Technician. For purposes of developing quotes, flex SRT's can have an hour value assigned to them to help establish the total labor hours for the repair. The standard hours in a quote are the foundation to several processes and measures in the service event. They include technician efficiency measurements, scheduling, capacity/demand measurements, and recovery rate calculations. <u>In most situations, an accurate quote will result in positive results in these measures.</u> Each repair plan can be built individually using the information provided by the diagnostic Technician. For service events that are done repeatedly, it is highly recommended to have prepopulated quotes on those kind of service events.

>> Presenting a Quote for Approval

Aside from the planning and detail put into creating a valid quote and a quality repair, the presentation of a quote plays an important part in building relationships and confidence in the minds of our customers. The presentation of a quote, when done properly, helps establish/manage the expectations of the customer on our ability and timing of the completed event. This allows them to determine alternate plans while their unit is being serviced. But most of all it establishes a point of communication between our service associates and the customer. NPS results indicate much can be done to improve our communication skills and volume, which in turn contribute to improved overall satisfaction.

>> When to Develop a Quote

All service events should be considered for building a quote, regardless of the demands of the customer. Building a quote provides a benefit for the distributor internally as well as providing customer communication benefits. Scheduling, effective resource utilization, and parts planning/ordering all benefit from the act of planning an event from start to finish. A quote can be developed prior to starting an event if the activity in the event is known. The most common are standard repair events; oil changes, tune ups, overhauls and campaigns. These events generally don't require a diagnostic procedure, therefore, can be planned based on the customer's request.

Repair events that require a diagnostic procedure to determine the path and timing of the repair should have the quote developed and presented at the completion of the diagnostic procedure, but before the start of the repair portion of the event. Quick response to this need and limiting the quote approval to 24 hours are two critical tools that can help reduce Repair Event Cycle Time, whether it be In-Shop or Mobile business. A fast and accurate response to the customer's needs increases the success rate of quote approval. The 7 and 8 step Service Business processes clearly define where in the repair event this activity should be completed.

>> Managing Quote Accuracy

The accuracy of a quote is as important to a successful repair event completion as any other aspect of the event. It has an impact on many of the measurable results we are accustomed to every day; which include Repair Event Cycle Time, Recovery Rate, Billing Efficiency, Technician Efficiency, and NPS, to mention a few. However, the timing of when the accuracy is determined is critical to other aspects of event management.

Obviously, having the invoiced amount equal to or less than the quote has a human aspect as it confirms our ability to predict and manage an event from beginning to end. It also will help manage the expectations of the customer to what we can deliver and when we can deliver it. This impact comes from the artful presentation of the plan details to the customer.

>> Presenting the Quote

As you present your customer remember the basics on customer interaction:

1. Smile! Customers remember happy people! All customers appreciate a warm welcome and to express a spirit that we care.
2. Because we care, never assume, always ask for clarification an approval.
3. As you present the quote, ensure that all the detail on the quote makes sense when read.
4. Always thank the customer for considering you as a service provider.

This easy to execute steps will go a long way on creating a positive impression with the customer, especially during this important step.

Repair quote accuracy starts at diagnostics, in which once the diagnostics are completed, a defined plan of the service event is put together to present to the customer. An approved quote provides better event completion accuracy and work assignments throughout the event. From an internal perspective, providing a high quality quote every time has many more event management benefits than just the final totals.

High quality quotes are a function of two basic activities; accurate diagnostics and communication. Diagnostic quality can be improved through proper use of aids such as EDS, T/S trees, and diagnostic tools that can pinpoint root issues. Seasoned professionals using these tools can provide the building blocks to improved quote accuracy. Communication between the various roles that support building quotes play a key role in improving quote accuracy at the first accept.

Each role provides information critical to the development of accurate quotes. By role, the necessary data each must provide can be listed as a checklist. The Service Supervisor has a list of questions that support the key pieces of information he should receive from each role to support his effort to develop an accurate quote.

Here are some examples of questions and required data the Parts Support and Technician must provide when contributing to the development of a repair quote.

>> Service Supervisor Questions to T/S Technician

1. What failed? — Why?
2. Any signs of abuse or neglect?
3. What work must be done to repair it?
   a. Access
   b. Progressive damage
   c. Any specific service tools needed

4. What parts will be needed?
   a. Cummins parts
   b. OEM parts

5. What are the results from diagnostics (in writing)?
   a. Active and inactive fault codes
   b. Results from T/S steps
   c. Documentation of results w/ T/S steps

6. Are there other repairs we should make the customer aware of?
   a. Oil leaks
   b. Water leaks
   c. Fuel leaks
   d. Loose items
   e. Belts
   f. Offers

7. What additional repairs should be included in the quote?

8. Condition of equipment

    a. Dents

    b. Scratches

    c. Missing components i.e. mirrors, clearance lights, reflectors, etc.

    d. Systems that are not working i.e. gauges, lights, features like cruise control, PTO, heater fans etc.

>> Questions Service Supervisor Should Ask Parts Support

1. What parts do we need?

2. Do we have all the parts we need?

3. What date will we have BO parts so we can complete the repair?

4. Are all the parts on the quote, available, and B/O?

5. When will you have all the parts identified and entered?

6. Have you talked to the T/S Technician to get any other information for recommended repairs not associated with the primary failure?

7. If BO parts have arrived, have the parts been staged to deliver to the stall to start the final repair?

8. Has the repairing Technician requested additional parts not included on the original customer quote? If so, are they on the quote?

>> Information the Technician Should Have Available

As the Technician completes the diagnostic steps and determines the necessary repair, there is some information that should be captured that will assist the Service Supervisor in building a valid, accurate repair plan. These include:

>> Information the Technician Should Have When Diagnostics Are Completed

1. What is the primary failure?

2. Why did it fail?

3. Is there indication of abuse or neglect?

4. What parts must be replaced?

5. What must be removed to change the failed part?

6. What progressive damage may exist? (Note: use experience or visual inspection to determine the extent of the damage from the primary failure)

7. What parts are required?

8. Is the serial number correct on the WO?

9. Document current mileage or hours

10. If the unit was not included on the WO, note the ESN, model, and mileage and/or hours on the WO. (This should be done before starting the diagnostics to get the unit and plan set up before the Technician is done with diagnostics.)

11. List of diagnostic steps and results noted or EDS DSID number documented in technician's write up

12. Other noted repairs needed not related to the original complaint; leaks, belts, loose or worn items, etc.

13. Can the T/S Technician correct the failure easily? In some cases it may be more cost effective to allow the T/S Technician to make the repair in the QS lane. Back log and how busy the shop is have to be factored into decision.

14. If the failure is not determined after 2 hours of diagnostics, suggest moving to the floor (if other events are in the work plan to be diagnosed).

15. If the issue was corrected through the diagnosis process.

16. All published troubleshooting diagnostic procedures have been exhausted without identifying the root cause of failure.

17. Time to diagnose is soon to exceed standard provided to customer without identification of root cause. In this case the Service Advisor must review all steps taken so far and their results with T/S Technician as well as what proposed next steps would be and involve. The Service Advisor must then contact the customer to inform them that the diagnostic limit discussed at the time of the initial customer interview has expired without identification of root cause. The Service Advisor must explain what has been done and the results. The Service Advisor must then provide a quote for next steps of troubleshooting as discussed with the T/S Technician.

>> Maintaining Accuracy

Once the repair has begun, it's very important to update the quote if changes occur, especially if the result is a price increase or longer repair time than originally communicated. The repair Technician must be aware of the repair plan and note any additional work he/she must do that's not included in the plan. If additional parts needs arise, it's important that those changes be noted on the quote and any delivery issues be communicated to the Supervisor. A popular practice of MBWA (Manage By Walking Around) is a recommended procedure to stay up-to-date on the progress of an event. Here are some examples of questions to ask a repair Technician during the course of an event:

Questions Service Supervisor Should Ask the Repair Technician

1. Is the repair on plan?
2. Any problems with the repair plan i.e. broke bolts, rusted parts, etc
3. Will it be completed by the promised date and time?
4. Have you found additional repair (progressive damage) we didn't have in the plan when you first started the event?
5. Do you have recommended repairs we should inform the customer about?
6. Do you have all the parts you need?
7. Is the repair plan complete for the work you are required to do?

>> What is the Impact?

The various communications that take place between the Service Supervisor and their support team (T/S Technician, Parts Support, and Repair Technician), are enablers for him to create and maintain an accurate repair plan so the Service Advisor can communicate to the customer. Looking at the internal needs of quote accuracy through the customer's eyes can provide a different perspective on the importance of being accurate at every step in the process of building and maintaining a quote, but with focus on getting it right the first time.

Here are some examples:

Technician	Service Advisor	Customer
Provides Updated Mileage	Able to determine warranty coverage	Informed about repair coverage
Documents time and parts required for repair	After checking with my parts specialist, I am able to develop an accurate quote for the primary repair	I was told how much and how long the repair will take
Provides diagnostic steps	I am knowledgeable about how we found the problem	I am confident about the work being done
Identifies any progressive damage	Able to re-quote and communicate with customer to let him know of new findings	I am informed throughout the service event and have the power to make decisions that will impact final invoice.
Informs when repair is complete	I am able to inform the customer that the repair is done	I was called when it was ready to be picked up

Parts Specialist	Service Advisor	Customer
Verifies all needed parts according to the repair plan developed by the technician	I know the availability of each part required to do the repair	I know what the repair plan is and the start date of the repair based on availability of parts
I know the date and time when parts will be arriving to the branch	I can schedule a time and date with the technician	I know when the repair event will start
Inform Service Advisor and Supervisor of any delays in parts delivery	Service Advisor can inform the customer of any unexpected delays	I know there will be further delays and I can plan for it
Inform Service Advisor and Supervisor of parts status related to repair until delivery happens	Service Advisor can calculate accurately completion date and time based on labor and parts availability	I know when the repair will be completed. I will be called the day the repair will be completed. I was called when the vehicle was ready. The invoice was ready when I arrive. The invoice matched the quote.

The combined effort and support provided by the Service Team can contribute to a better customer experience through accurate, timely communications and to meeting our commitments of time and price in the end. Internally, we allow ourselves the opportunity to plan each event so we better use our facilities and resources to their fullest, while increasing our profitability.

Driving Improvement

Recall from Chapter 9, the Capability Maturity Model (CMM) is being used by DBU to track the maturity of the QuickServe Process. This CMM is a standard industry model which defines the maturity of any given process within an organization. The last step of the Capability Maturity Model is the "Optimized" level (refer to Figure 11.1). In order to achieve that level, a continuous improvement approach must be taken in which the QuickServe Process is being optimized either through improvement projects on key performance indicators, lean projects and/or 5 S projects, among other areas for improvement.
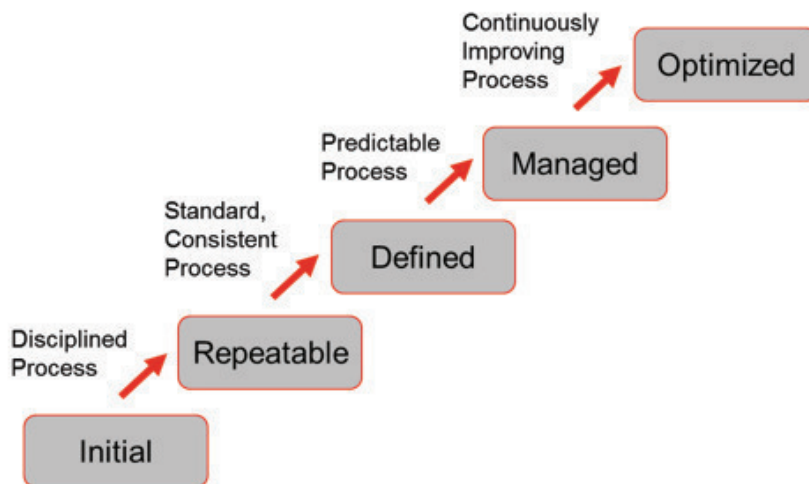
Figure 11.1   *Capability Maturity Model: Standard Industry model which defines process maturity*

Our ABO/RDO QuickServe Champions, Distributor QuickServe Process Leaders and branches must be continuously looking for ways to improve the process, as this is the foundation of customer support excellence. Serious service improvement involves people in every aspect of the service event, including service planning, quoting, repairing the product, allocating parts, etc. It requires more trust between leaders and key roles of the QuickServe Process, a greater sharing of information, and an unprecedented commitment to continuous improvement and customer service. QuickServe Champions and Distributor Process Leaders must educate, coach and encourage a consistent execution of the QuickServe Process to consistently deliver service faster and with fewer mistakes than ever before. We must strive to make this process our competitive advantage.

QuickServe Playbook

As discussed during past QuickServe Workshops, there are 10 principles of continuous improvement to be successful in this journey.

1. **Discard conventional fixed ideas.**

    The very idea of continuous improvement is unconventional. In general terms, organizations that are not actively looking for ways to improve are destined to be left behind in this new global economy. The stakes are higher than ever, companies who continue to think that improvements are not necessary in their organizations, will remain stagnant, while their competition outgrow them in the market. Other Service providers have launched their own versions of QuickServe which drives the challenge for Cummins Distributors to not only execute the process in a consistent manner, but to do it better than the rest.

2. **Think of how to do it, not why it cannot be done.**

    The pessimist will create all kinds of reasons that something can't be done. The optimistic, forward thinker, on the other hand, focus on the outcome. Then, come up with all the ways that the outcome could possibly be accomplished.

3. **Do not make excuses. Start by questioning current practices. Making excuses for not doing something is easy.**

    Again, focus on the outcome. Then, take action. There is no excuse for not trying something. The popular approach is "if isn't broken, then don't fix it", but as stated before, organizations that are not continuously searching for ways to serve their customers better and in a more efficient way are on a path of stagnation which will cause them to lose customers and customer focus.

4. **Do not seek perfection. Establish a baseline and start working on improvements.**

    If we all waited for perfection, we'd still be reading by candlelight and riding horses to work. Once you establish a baseline and determine the milestones that you want to achieve, then run with it. In other words, take action. Then, adjust as you go along. Remember that the service key performance indicators represent "indicators" or places to look for improvements in process, skills, and procedures.

5. **Correct any Obstacles, Hurtles and Issues Preventing Execution of the Process**

    Obstacles, hurdles and issues happens. Accept them, and adjust accordingly. Acknowledge that there is an issue and an improvement is needed, especially when it affects customers, then correct it and put safe guards in place to prevent that mistake from repeating again. For example, the whole purpose of the QuickServe Web Audit Tool is to determine gaps in the execution of the process, so our customers can reap the benefits on being able to tell them:

    a. What is wrong and why?

    b. How much, and

    c. How long the repair is going to take.

If audit results show process steps not being done; then, work as a team with the branch to put together an action plan and follow through on it. There will be some actions that would take some time due to infrastructure but there would be some other ones that are 'just do it' that require no cost, just process discipline.

6. **Do not just spend money for continuous improvement, use your knowledge and experience.**

There are improvements that do not required major investment. Examples of those are lean and 5S projects where all it takes is taking the initiative to do it. Another example is "rifle shot" projects. Use the QuickServe Web Audit Tool to understand all gaps and focus on the ones that are easy to implement fixes with no major investment required. During one of the QuickServe workshops, a Distributor QuickServe Process Leader shared with us an example of how to improve the flow of parts to the service area that required zero dollars to do it. It was just a matter of rearranging shelves that allowed people easy access instead of walking around it.
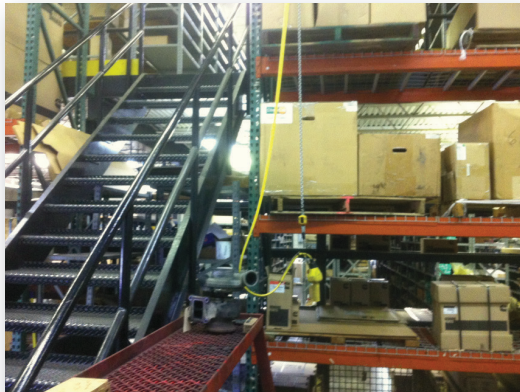
Before   *Parts area blocked*

After   *Parts area with easy access to it.*

7. **Wisdom is brought out when we can see and feel the waste, especially during uncertain economic environments.**

Challenges are usually undesirable, but they can be tremendous learning opportunities. Running a profitable business in uncertain economic environments force us to think about how to create better and more efficient ways to run the service business. For example, if a technician was looking for an electrical harness, which one of the two attached pictures would be faster and easier to find the required harness? Any type of waste creates expense which hits any service operations' bottom line.

Service harnesses old set up.
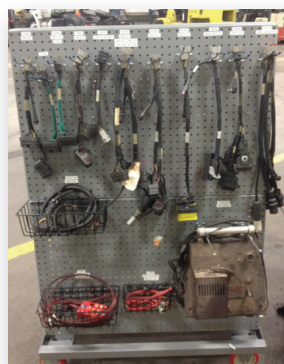
Service harnesses new set up.

8. **Ask "Why?" five times and seek root causes.**

    The 5 Why's is a technique used in the Analyze phase of the Six Sigma DMAIC methodology. The 5 Why's is a great Six Sigma tool that doesn't involve data segmentation, hypothesis testing, regression or other advanced statistical tools, and in many cases can be completed without a data collection plan.

    By repeatedly asking the question "Why" five times (five is a good rule of thumb), you can peel away the layers of symptoms which can lead to the root cause of a problem. Very often the perceived reason for a problem will lead you to another question. Although this technique is called "five why's", you may find that you will need to ask the question fewer or more times than five before you, find the issue related to a problem.

9. **Seek the knowledge and experience of ten people rather than the knowledge of one.**

    Much has been written about the power of group thinking. Whether it involves seeking one or two other people's opinions, holding a meeting with others, or more formal brainstorming or mastermind groups, there is power in numbers.

Newly organized tool room.

    Our Technicians are a wealth of knowledge in bringing ideas to make their jobs easier. All we have to do is ask! Furthermore, there is a network of QuickServe Champions who most likely have experienced the same challenges and have done a 6 Sigma Project on the issue that you are facing. So, if you want to find out how to be successful at that identified improvement, ask someone who has already done it. Better yet, gather several people who have already done it. As an alternative, use the tools available at the Distributor Portal or Cummins Connect QuickServe Community to gather the wisdom of others.

10. **Continuous Improvement ideas are infinite.**

    Continuous improvement is a process of learning and growing, steadily and continually. There are always ways to "tweak" elements of the Service Process in order to improve them. It has been said that service excellence is a journey, not a destination. And practicing the philosophy of continuous improvement will help you to make the most of that journey!

>> Tools Available

Do not reinvent the wheel! A tool was developed not only to assist you in understanding the KPIs but to share proven Six Sigma projects that provide a roadmap for distributors to improve on each of the service metrics. With now more than 80+ projects included, this tool helps share KPI information in a format that makes it easy to understand the relationship between not only the KPIs but the relationship between the metrics and Six Sigma improvement projects.

Click here to download from the Distribution Portal

>> A Note about Lean

In previous workshops, Lean was introduced as a culture to reduce waste and increase value to the customer in any process. One of the DBU Quality Council key initiatives was to develop/design a tool kit to embrace Lean principles. A work group was assigned to perform a voice of the customer exercise and identified the key lean tools that most pertained to DBU.

Once the key tools were identified, the DBU Quality group put together the training material, utilized existing training developed by the Corporate Operational Excellence group, and material already used by different distributors.

There are different levels of training available depending of the degree that you want to be involved in Lean, from beginner to specialist. The DBU quality group is partnering with Manufacturing Operations and Service Functions to roll out the DBU Lean tool kit training and apply these tools throughout the organization and to the QuickServe Process, with the intention of executing the process in a most efficient way. Some of the tools being practiced and applied during these lean workshops are:

1. Value Stream Mapping
2. Spaghetti Diagrams
3. 5 Why's
4. 5 S
5. Fish Bone Diagram

If you are interested on any of the training available or require more information about Lean, please contact the DBU Quality Organization or your Regional Service Functional Excellence Leader.

Continuous improvement never ends, and it is never too late to start on this journey. Organizations that do not continuously improve, become stagnated, obsoleted and soon forgotten.

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"Perfection is not attainable, but if we chase perfection
we can catch excellence."

~ VINCE LOMBARDI (AMERICAN FOOTBALL HALL OF FAME COACH)

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QuickServe and COS

>> A Practical Way of Using the Cummins Operating System

The purpose of the Cummins Operating System (COS) is to continuously improve our products and services by eliminating waste and reducing variation in our processes. COS is a common approach that can be applied globally across our Cummins distribution network, regardless of the type of market that they serve. This common approach is critical to the achievement of our Cummins Distribution Unit growth plans and is the foundation for the way we conduct business with our customers and delivery partners across the globe.

The goal of COS is to make it possible to see problems so that we can react quickly to resolve them and, thereby, continuously improve toward defect-free processes that satisfy our customers' needs and achieve the business results we desire.

A fundamental principle of COS is that processes, how we do our work, drive our results. If we want to assure superior results, we must have excellence in our processes. If we hope to improve our results, we must improve our processes. This fundamental principle, along with our commitment to superior results and continuously improving performance, forms the basic logic behind COS.

Put the customer first, and provide real value

Synchronize flows (material, physical and information)

Design quality in every step of the process

Involve people and promote teamwork

Ensure equipment and tools are available and capable

Create functional excellence

Establish the right environment

Treat preferred suppliers as partners

Follow common problem solving techniques

Use Six Sigma as the primary process improvement method

The Cummins Operating System (COS) consists of ten practices. In this chapter, we will make the connection between each of these practices and the QuickServe Process.

Put the Customer First and Provide Real Value

The QuickServe Process is customer centric; it is all about having the ability to fulfill customer expectations on dependability. As discussed in previous chapters, the 7 and 8 step process allow us to put together a quote for our services that defines a commitment to price and time, puts structure to maintain good communication and keep our promises while considering the customer needs. If we are able to execute this in a consistent manner, every time, then we have added value that will turn into a long-lasting relationship with our customers and prompt them to tell others to try us out.

Synchronize Flows (Material, Physical and Information)

The QuickServe Process is based on good communication (internal and external). The flow of communication between the Service Advisor, Parts Professional and Technicians is crucial to develop a quote for the repair work order. The flow of technical information is another key component of the QuickServe Process where Technicians should have enough background from the Service Advisor's initial interview with the customer to be able to duplicate the issue. Also, Technicians should have the latest technical information to properly troubleshoot and repair the engine to avoid come backs. Finally, the Parts Professional ensures that the required parts are available to complete the repair so that technicians have access to the required parts to complete the repair.

Design Quality in Every Step of the Process

Ensuring consistency in the execution of each of the 7 and 8 steps in the QuickServe Process is essential as it as each of the steps has a domino effect when executed properly or improperly. The QuickServe Web Audit Tool is a great tool to evaluate how well the process is being executed and determine specific improvements required to achieve consistency. If the process is executed well, our customers will perceive that we are providing value added to their business.

Involve People and Promote Teamwork

The success of the process relies on team work and individuals knowing the roles and responsibilities. Below are the summary tables from the QuickServe Qualification Training material that will help you define your team's specific roles to promote teamwork and team success in the execution of the QuickServe Process.

INSHOP QUICKSERVE PROCESS ROLES

Step	Process	Svc. Writer/ Svc. Advisor/ CSR	Service Supervisor/ Shop Foreman/ Leading Hand	Parts Professional	Technician/ Apprentice
1	Greet the Customer	X			
2	Diagnose the Equipment				X
3	Develop Quote/Repair Plan/ Warranty Determination		X	X	
4	Communicate Quote	X	X		
5	Carry out Repair		X		X
6	Invoice	X			
7	Final Customer Communication	X			

MOBILE QUICKSERVE PROCESS ROLES

Step	Process	Svc. Writer/ Svc. Advisor/ CSR	Service Supervisor/ Shop Foreman/ Leading Hand	Parts Professional	Technician/ Apprentice
1	Greet the Customer	X			
2	Stage the Repair (Mobile)		X	X	
3	Diagnose the Equipment				X
4	Develop Quote/Repair Plan/ Warranty Determination		X	X	
5	Communicate Quote	X	X		
6	Carry out Repair		X		X
7	Invoice	X			
8	Final Customer Communication	X			

Ensure Equipment and Tools are Available and Capable

Maintaining and calibrating the proper tools to repair the engine ensures a high quality repair and less repair rework. Having computers equipped with Insite, Expert Diagnostic System (EDS) and with access to QuickServe Online allows your Technicians to use the proper troubleshooting tools to diagnose and repair the equipment. Having the right tools and equipment available and capable is critical for proper execution of the QuickServe Process and fulfill our customer's expectation on dependability.
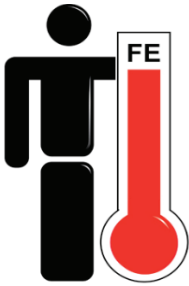
Create Functional Excellence

QuickServe is about performing the 7 Step InShop and 8 Step Mobile process consistently. Service excellence is dependent upon the consistent delivery of a high value experience, day after day, year after year, regardless of the location of the repair. QuickServe is the systematic output of a service model that is designed to increase customer loyalty and quality of service repairs. The QuickServe Audit Tool provides the ability to measure the performance of the QuickServe Process at a branch level so functional excellence can be achieved.

Establish the Right Environment

QuickServe promotes an environment where everyone is working as a team to support every transaction. The QuickServe Process creates an environment where people know their roles and where these roles are carried out with professionalism and diligence. It's maintaining a clean, organized environment that makes it easy for people to do their jobs which ultimately impacts the way we serve our customers.

Treat Preferred Suppliers as Partners

Building relationships with your suppliers that support your service operations is important for the QuickServe Process. Whether it is a machine shop, a radiator shop or other supplier, their responsiveness can affect the execution of the QuickServe Process especially in the areas of repair times.

Follow Common Problem Solving Techniques

The KPI's deployed as part of the QuickServe Process are the story tellers that allow you to drive towards operational efficiencies. The analysis and trending of these KPIs, allows to detect waste so the proper actions are taken to reduce these inefficiencies. From the customer's perspective, the QuickServe Customer Meter data allows you to pinpoint any specific issues with the execution of the process so that corrective actions can be put in place. The combination of these service operational KPIs along with the customer metrics will guide the organization on how to provide exceptional service while being profitable.

Use Six Sigma as a Primary Process Improvement Method

Any operational improvement aims to reduce waste and maximize operational efficiencies. There are more than 100 Six Sigma projects that relate to the QuickServe Process. Six Sigma methodology allows you to discover ways to find efficiencies while executing the QuickServe Process. Recall that we have the KPI Road Map Tool available in the Cummins Community and Distribution Portal (refer to the Tools and Resources Chapter) that summarizes some of the KPI projects done by other distributors that you can use as a reference as you work on your continuous improvement projects.

KPI Roadmap Tool

Click each icon below to get to KPI definitions, examples and summaries of related Six Sigma projects that will assist you in your path towards **Legendary Service!**

- T/B Ratio
- RECT (Repair Event Cycle Time)
- Billing Efficiency
- Productivity
- WIP (Work in Progress)
- PIP (Paper in Process)
- Labor Recovery Rate
- Labor Utilization
- NPS

NAVIGATION

Consider Value

Webster's Dictionary defines value as "a fair return or equivalent in money, goods, or services for something exchanged; also relative worth, utility, or importance".

When measuring value the results of such a measurement are subjective at best. In other words, what might be of value to one person may not be to another. In most cases, however, the first thing that comes to mind is a monetary value. This chapter offers some perspective on value from the service business point of view.

While customers will always be cost conscious, there are many things we can do to improve the overall customer experience and satisfaction, other than meeting the price. We will not be the lowest price service offering in the area all the time. There are hundreds of service outlets who are willing to provide similar services to ours. What can set us apart from them is the perceived value we offer to every service event. Quotes, for example, are a value–added benefit customers get for doing business with us. It provides the basis for the relationship we will develop as a result of the service event. By providing a quote that defines, in real terms, our commitment to price and time, we can establish a level of trust and confidence that adds to the value the customer sees. But it starts much earlier than that.

Consider the appearance of the building, work areas, service bays, parking lots, lounges, and rest rooms. Many of these areas are shared with customers and are a reflection of the pride each of us has in our business surroundings.

Service Writers add value with the quality of their appearance, communication, professionalism in their approach to their job and the customer's needs. A neat, organized work area that's quiet illustrates our professional approach to how we want to do our work and the environment we want to work in. Conducting an interview with other employees talking loud or using inappropriate language doesn't project a professional image of the organization or the people in it. It casts doubt on the expected outcome. A quality interview that focuses on customer needs will provide a level of confidence that we care about the final product. Providing proper directions to waiting areas or local sites can help customers get more out of the service event other than lost time. By being clear about the fundamental business process (quoting all service events) we will follow will help them understand our approach to providing service with no hidden "extras". Service Supervisors bring value through the quote for each service event by making sure it is accurate and contains the fundamental elements: failure, repair, time to complete, coverage and final cost.

The presentation of the quote is a very important part of defining value for customers. When we "hurry" to the price and forget to review how we arrived at it, the customer has no relative measure of the price to the amount of work and parts we must invest to solve their complaint. Selling value means a short explanation of what failed and why, what work must be done to resolve it, the time required to obtain all the necessary parts of some must be ordered, any coverage that may be available, and the time we will commit to completing the repairs. The last value-added item in the presentation is price. By establishing the components of the event, the price becomes more relevant. By following this approach we manage the customer's expectations of price and time, and assure ourselves that there will be no unpleasant surprises at the end. It doesn't stop with the quote presentation however. It is important that we keep the customer advised of changing conditions. Value can also mean "predictable". By establishing that we are a quote business our responsibility for managing the quote just begins.

Establishing the original quote with quality diagnostics and planning begins a process of managing the execution of a plan that is defined by the service Technician and the Service Supervisor. Hopefully we were able to determine all the job needs and our first approach was accurate. When that's not the case, keeping the customer advised adds value as it demonstrates our concern with the needs and expectations of the customer.

Finally, when the job is completed and we are closing the transaction, it is always best to ask if there are any questions. Highlight any savings we were able to provide between the quoted amount and the final invoiced amount. Some customers we have served have posed some interesting questions about invoiced values that are too far below the quote, so quoting high and invoicing low has its limits when it comes to measuring value. In short, the best approach is build a fair quote based on what will be done; and stick to it. Thanking the customer for their business and suggesting if they ever need assistance or just require regular service we hope they will consider us again adds value. It shows we respect the fact they selected us and allowed us to provide service. We hope we can continue the relationship into the future, whatever their needs may be.

As you can see, value is in the eye of the beholder, but it can be managed. It's not one person; but everyone working as a team to support every transaction. It is people knowing what their role is and carrying it out with professionalism and care. It's maintaining a clean, organized environment that makes it easy for people to do their job. And lastly, it's communication; among ourselves and to our customers. Eliminating the unpleasant surprises and building toward the pleasant ones is one way we bring value to the relationships we build through the service business.

We can't always compete on price, but if we've put together a fair quote for our services, maintained good communication, kept our promises, and considered the customers' needs, we've added value that will turn into a long lasting relationship with our customers and prompt them to tell others to try us out.

LIST OF ACRONYMS

COS	Cummins Operating System		ABO	Area Business Organization
SRT	Standard Repair Times		RDO	Regional Distribution Organization
RECT	Repair Event Cycle Time		DAOP	Distributor Annual Operating Plan
RTCM	Repair Timeliness Customer Measure		QS	QuickServe
NPS	Net Promoter System		WIP	Work in Progress
BO	Back Order		JSA	Job Safety Assessment
T/S	Troubleshooting		P&L	Profit and Loss
WO	Work Order		GPP	Global Position Profile
ESN	Engine Serial Number		PIP	Paper in Process
MBWA	Manage by Walking Around		CMM	Capability Maturity Model
CSE	Customer Support Excellence		JV	Joint Venture
CIW	Customer Interview Wizard		LU	Labor Utilization
EDS	Expert Diagnostics System		BE	Billing Efficiency
QSOL	QuickServe Online		4C's	Complaint, Cause, Coverage and Correction
AR	Accounts Receivable		CSA	Customer Service Advisor
OTP	Overtime Premium		CLC	Cummins Learning Center
BMS	Business Management System		CVC	Cummins Virtual College
LS3	Legendary Sales, Service and Support		DBU	Distribution Business Unit
T/B	Total to Billed Ratio		DMAIC	Define, Measure, Analyze, Improve and Control
KPI	Key Performance Indicator		PBIT	Profit Before Income Tax

Suggested Organizational Charts to Properly Aligned the QuickServe Process

>> Content and Approach

The purpose of this document is to define a scalable model of the positions required to run the QS process effectively and profitably and provide a template for Service Organisational development. The number of personnel within each role will be dependent upon business mix and volume at any given Branch and is a Service Operations decision.

For Dependent Distributors, the QS Champions can use these models to categorise and define their Branch Service organisations. For Independent Distributors these models represent recommended guidelines.
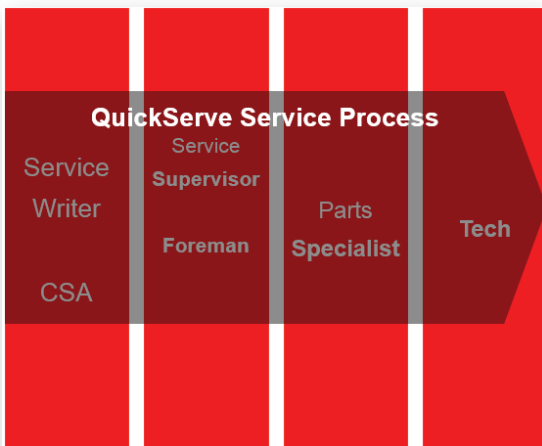
Additional 'business support' roles that are required to support the service organisation were also identified.

Remember that Communication and workflow among team members is vital to ensure that the QuickServe process is effective and customer commitments are met. Manage it as a TEAM, Manage it as a PROCESS!

In terms of branch size classification, the key operational criteria used to categorize the service organization structures was the number of service jobs as this directly relates to the resources required to complete this work.

These are the defined categories:

> Small Service Provider:　　 0 — 20 Service Jobs per month
>
> Medium Service Provider:　21 — 99 Service Jobs per month
>
> Large Service Provider:　　 100+ Service Jobs per month

The other consideration taken was the recommended Technician to Admin ratio of 3:1. However, this is just a recommended ratio, but every location should use their service KPIs to determine their optimal ratio.

Small Branch Organizational Structure
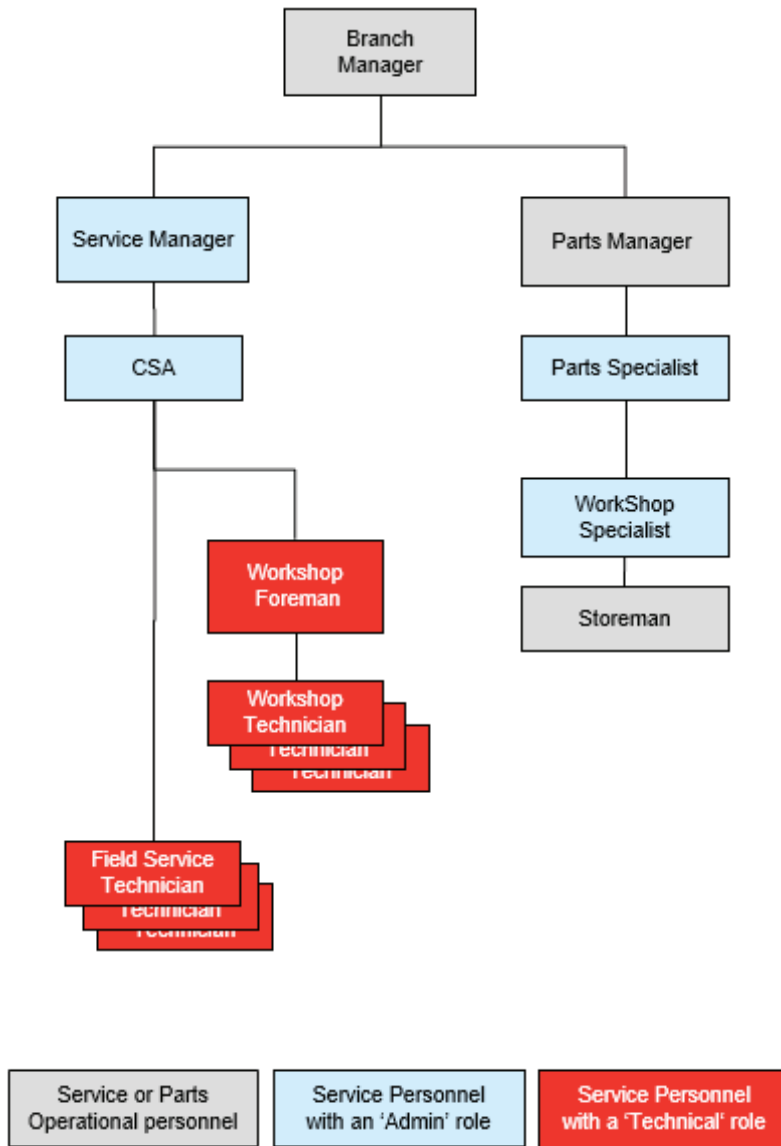
Medium Branch Organizational Structure

Branch Manager

Service Mgr or Controller

Parts Mgr or Controller

CSA Field Service

CSA Workshop

Service Writer

Warranty Administrator

Parts Admin

Field Service Technician

Workshop Foreman

Workshop Specialist

Foreign Specialist

Workshop Technician

Logistics Specialist

Storeman

Legend:
- Service or Parts Operational personnel
- Service Personnel with an 'Admin' role
- Service Personnel with a 'Technical' role

Large Branch Organizational Structure

Branch Manager
- Service Mgr or Controller
  - Workshop Mgr or Controller
    - CSA Powergen
    - CSA Field Service
      - Field Service Technician
    - CSA Workshop
      - Workshop Foreman
        - Workshop Technician
    - Service Writer
  - Warranty Mgr
    - Warranty Administrator(s)
- Parts Mgr or Controller
  - Workshop Parts Specialist
  - Foreign Specialist
  - Warehouse Supervisor
  - Storeman
- Logistics Manager
  - Logistics Specialist

Legend:
- Service or Parts Operational personnel
- Service Personnel with an 'Admin' role
- Service Personnel with a 'Technical' role

QuickServe Web Audit Tool User Guide

>> Table of Contents

QuickServe Playbook

>> System Requirements

The Cummins QuickServe Audit Tool requires Internet Explorer version 10 or better, Google Chrome, or Firefox.

Before performing an audit, check the Internet Options settings to ensure the "delete browsing history on exit" is not checked.
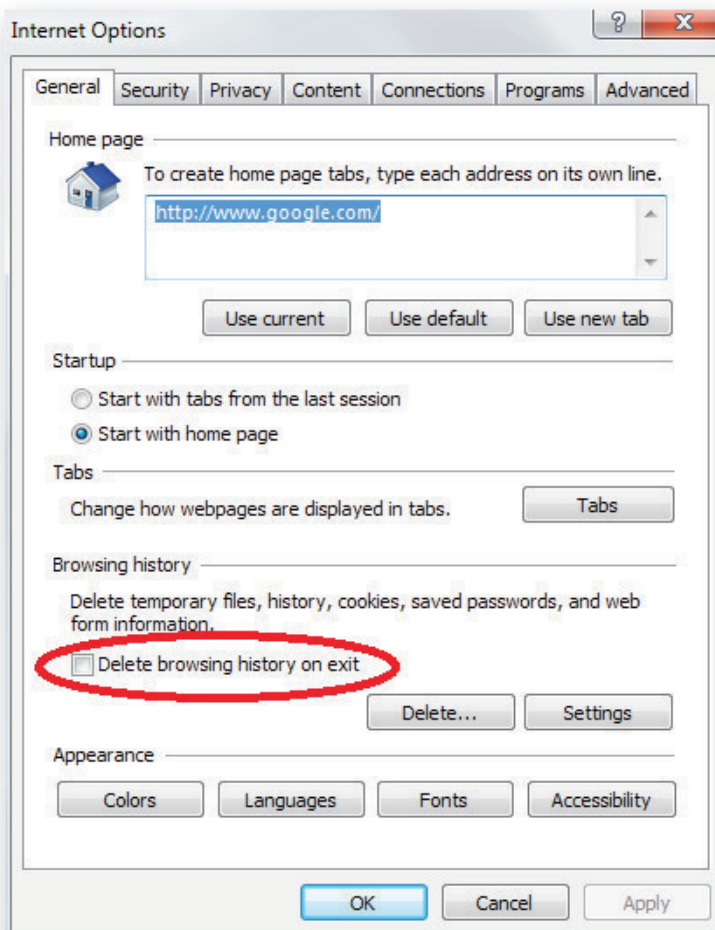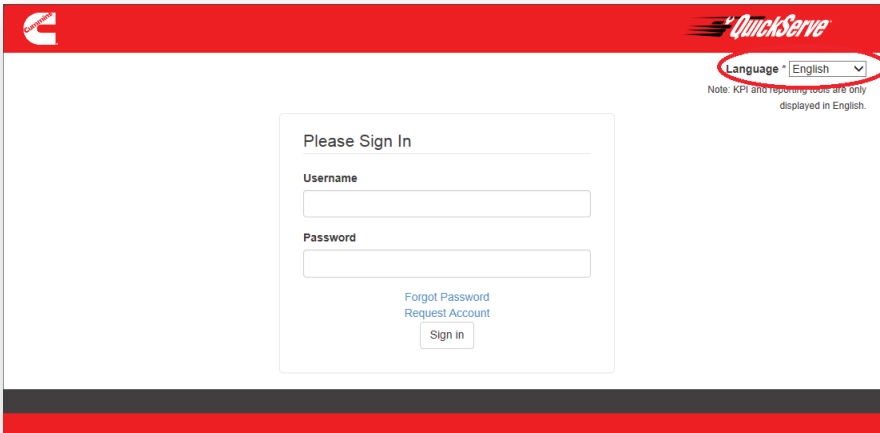
If browsing history is deleted, all audit data performed but not successfully submitted will be lost.

◀◀ Log in and navigation

Selecting a language and logging in
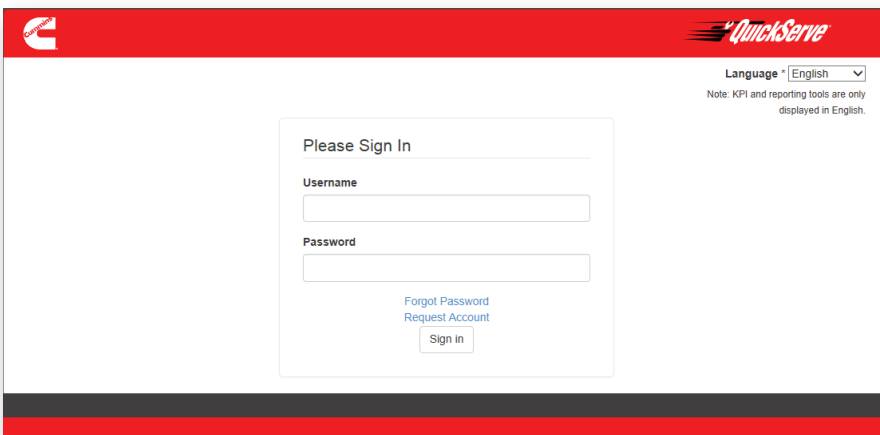
Navigate to QuickServeProcessTool.Adayana.Net. There are a few things we can do on this page. One is to select your default language. You can do this by clicking the drop down button in the top right as shown below. Note, only the Audit Tool portion of this site is offered in Spanish and Portuguese.

You can log in by entering your Username and Password. Then click the Sign in button to log in. You can also request a password reset by clicking on the Forgot Password link shown below or if you don't yet have an account, you can click the Request Account link.
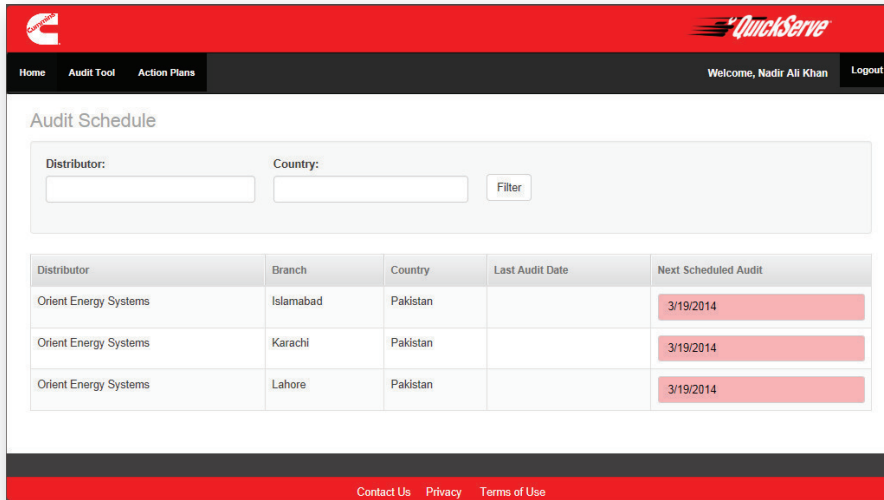
Your User ID is the same as your Cummins WWID.

Navigation

Now that you are logged in there are a few buttons across the top of the screen. From this point on referred to as the top navigation bar. Refer to the image below to see the top navigation bar highlighted.

>> Home Page

Upon logging in you will see the Home page, which displays the audit schedule for your associated locations. There are four columns. Clicking on the column headers will sort the information by the column selected. The last column is for the next scheduled audit.

Select the last column for each given branch to update the scheduled audit date.

>> Audit Tool

Navigate to the Audit tool by clicking on Audit Tool in the top navigation bar. This will display a page that looks like the following:
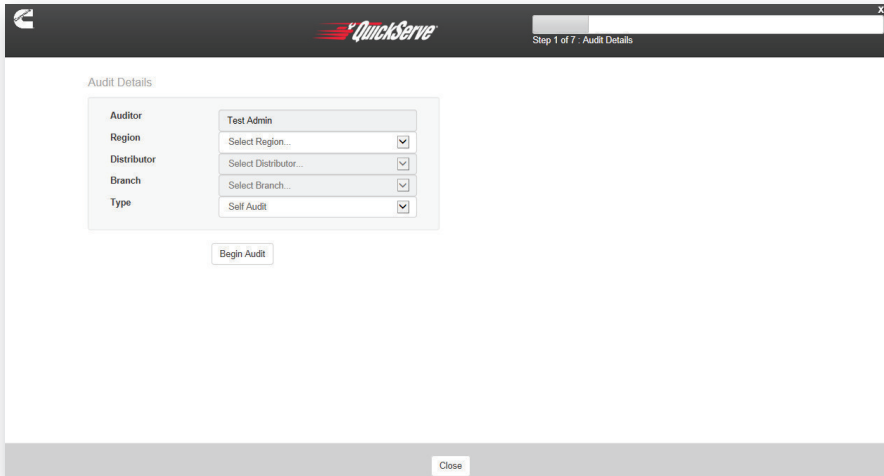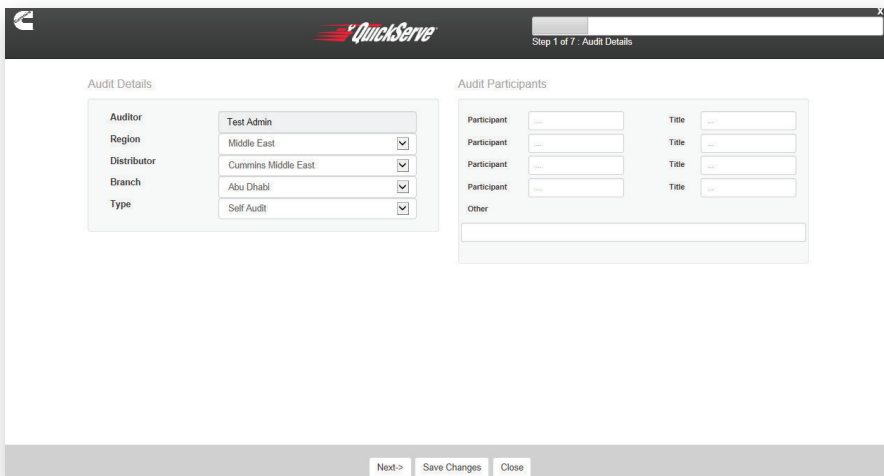
From this page one can begin a new audit or resume an audit that was started but not finished. Also notice the link to Audit Instructions is available. To begin a new Audit Click the Launch New Audit Wizard button.

This will open up a new window that looks like the following:

There are four selections that need to be made before we can begin the audit. Click each drop down menu and select the appropriate choice for your audit to continue.

Once you've selected the appropriate choices, click the Begin Audit button. There will then be a pop up stating that your audit has been created. Click OK. This brings up the following screen:

Click each Participant and Title box and complete the names.

The highlighted red circle in the image above will be available throughout the remainder of the audit. This will be referred to as bottom navigation from now on. It allows you to move forward by clicking Next, save your progress by clicking Save Changes, or to just close the audit by clicking Close. On later screens there will be a Previous button and on the very last screen there will be a submit audit button.

Click Next once you have finished filling in the details of your audit and are ready to proceed. This will bring you to the Preliminary Questions page.

>> Preliminary Questions

Here there are five yes or no questions that need to be answered before moving forward. To answer the questions click on the drop down menus below them as shown below.

Clicking yes or no changes some features later in the audit (e.g. selecting no for InShop would mean that you will skip the InShop work orders section later on).

Selecting yes for the NPS questions will prompt you to fill in some more data. The information requested on this screen comes from the Allegiance system. You must log into Allegiance and pull the data for this branch for the last 12 months.

Once you've answered all the questions and filled in appropriate data click next from the bottom navigation.

QuickServe Playbook
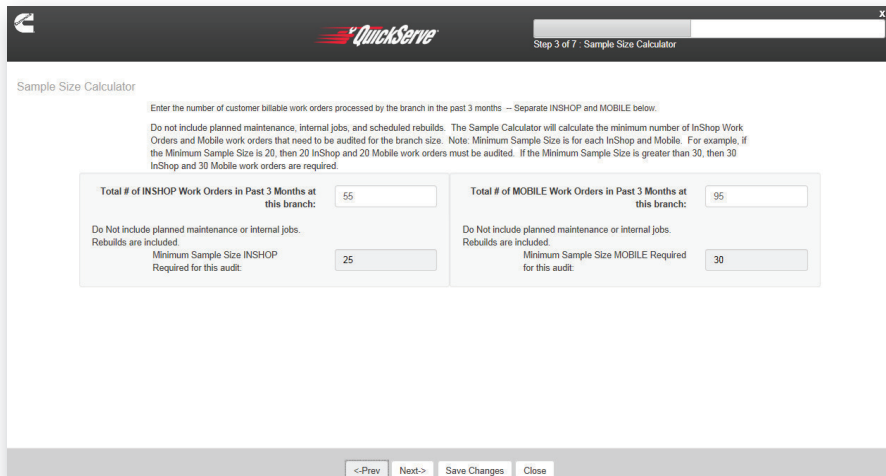
>> Sample Size

The Sample Size Calculator is required completion before moving on with the audit. On this page there is a separate box for InShop and Mobile work orders. Here, you enter in the number of work orders that have been completed in the last 3 months. After entering in a number the minimum sample size required for the audit should be displayed beneath. After filling in the appropriate data click Next on the bottom navigation bar.

>> Tech to Admin Ratio

The next page in the audit calculates the tech to admin ratio. Here you enter the number of people you have in each position. The fields will accept any non-negative decimal out to two digits. Once you've entered a number into each field the ratio at the bottom will update. After filling in this information, click Next.

>> Observational Audit

The Observational Audit is an optional portion of the audit. These are Yes or No questions, with an area for comments below each section of questions. You can find more questions by scrolling down on this page. Click Next to move on to the next portion of the audit.

>> Branch Level Audit

The Branch Level Audit is to evaluate the health of the QuickServe structure within the branch. Each entry requires a response. Each No or N/A response requires a comment, meant to explain the response. There are help boxes which, when hovered over, will open additional information on the associated criteria or role.

Once you have answered every question and provided necessary comments click Next to continue.
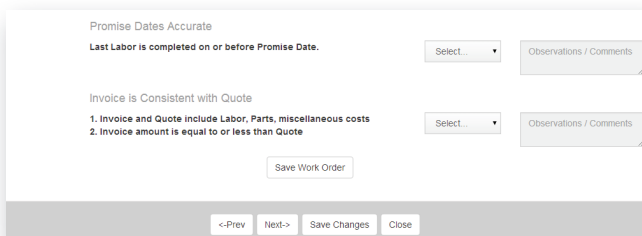
>> InShop and Mobile Work Orders

Now you will be able to begin entering the InShop or Mobile work orders being audited. You get to the InShop or Mobile pages depending upon whether or not you answered yes to these questions back on the preliminary page. If you answered Yes InShop is performed at this location, you will now be entering InShop work orders. Both pages look and behave similarly. The first thing you must do is click the Add New button on the left side of the screen. It's highlighted below.

After clicking Add New, you will then receive a prompt to enter in the work order number. Enter the work order number and click OK. Now fill out the Service Advisor, Supervisor, Technician fields and complete the remaining criteria for the work order. Once you've answered the final question you should see a button that says Save Work Order. Some criteria require a comment explaining a No or N/A response, these will be highlighted by the system if no comments are entered before Save Work Order is clicked.

Click this and you should see a prompt stating that the work order has been saved. Click OK. You can now add another work order by clicking Add New work order again if you need. You can also review a previous work order by clicking the work order number in the box highlighted below.

After entering all of the work orders you intend to audit, click the Next button.

>> InShop and Mobile Summary Pages

After auditing the work orders and clicking Next, you will the InShop Summary page. This page displays the criteria evaluated and the score for each criteria for the InShop work orders audited. The scores are color coded. If the score is yellow or red you will have to enter some comments on that item before clicking Next. The intent of this requirement is to provide the auditor with a place to provide an overall observation as to reasons for the lower scores. The comments entered here will also be shown on the Action Plan page.

Once you have entered in all the comments you need, click Next. In this scenario, the Mobile Work Order entry screen will be displayed. Complete the audit on the Mobile work orders and comment as needed on the Mobile Summary page. Click Next.

If any data or comments are incomplete, you will receive an error message indicating all required fields need to be completed. If all data is complete, you will receive the following prompt:
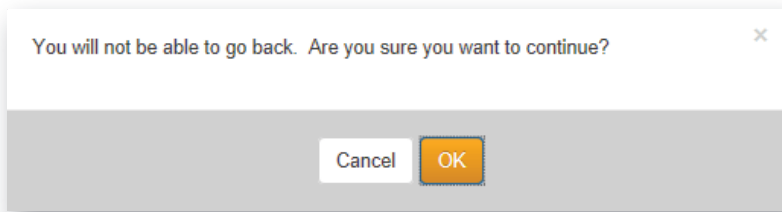
The purpose of this warning is to alert the auditor that once the Action Plan page is displayed, there is no further access to the previous audit screens. Clicking OK on this message will take you to the Action Plan page.

>> Submitting the Audit

You should now be looking at the action plan screen. Here you can see various audit details. The top left of the screen shows the region, distributor, branch, audit type, and number of work orders. The Audit Tool does not require the auditor to audit the minimum sample size calculated. When less than the sample size is audited, an informational message is displayed below the number of work orders. The Action Plan includes listing the participants as well.

The information completed on the Preliminary Questions page are displayed here, along with scoring for the Customer Meter questions, displayed as Customer Perspective.

There is a scroll bar on the right which allows you to scroll down and view the various sections of the audit. Anything that has a red or yellow score requires an Action Plan Component, Person Responsible and Planned Completion Date.

When you click on the Planned Completion Date a calendar appears. Select a date on the calendar to continue. Only future dates are allowed in this field.

Once you've filled in all the comments and dates and you're ready to submit the audit click the Submit Audit button from the bottom navigation. You will then see something similar to the following:

Click Submit again to finalize your submission. A message stating that the audit has submitted should display and the Audit exits.

>> Resuming an Audit

From the Audit Tool page, click the Resume Incomplete Audit button in the center of the page.
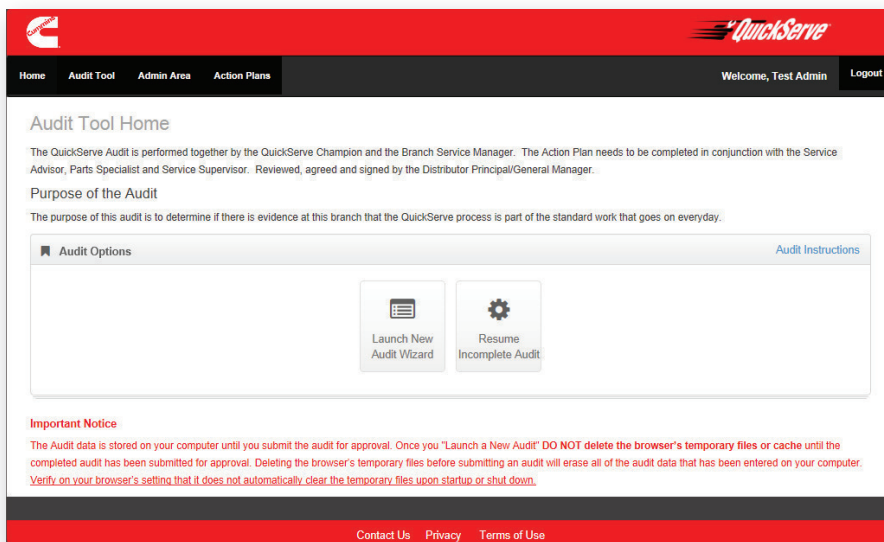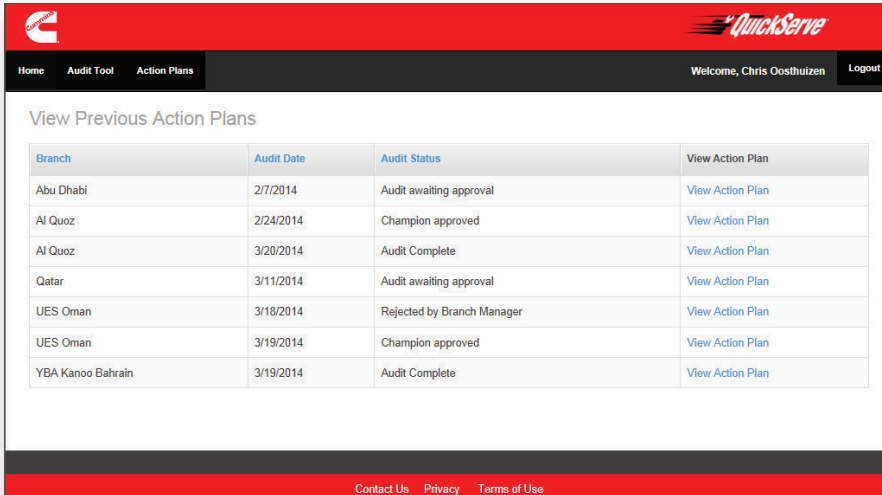
A pop-over should appear listing all previously incomplete audits. Click the Resume button to open the audit.
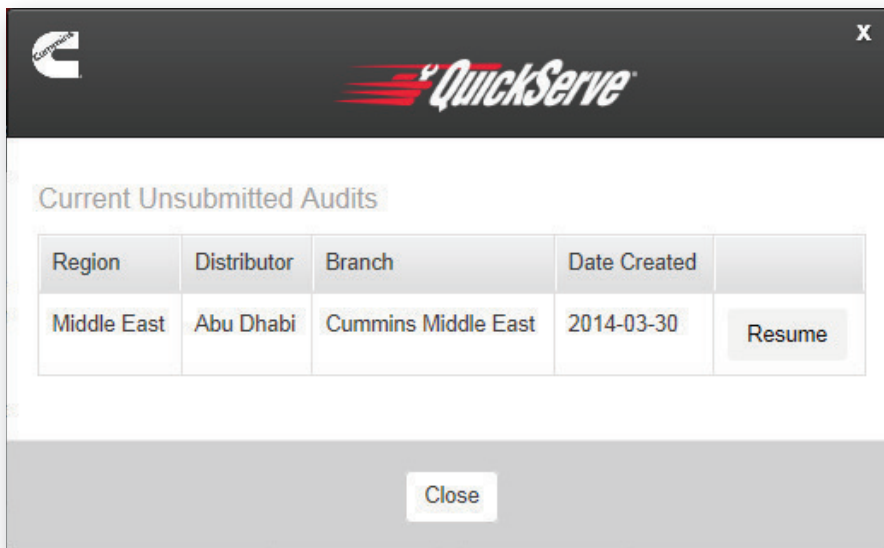
>> Review Action Plans

Click on Action Plans from the top navigation. Here you will see a list of previously completed audits, the day they were completed, and if they have been approved or not. There is also a link attached to each audit to view their action plan.
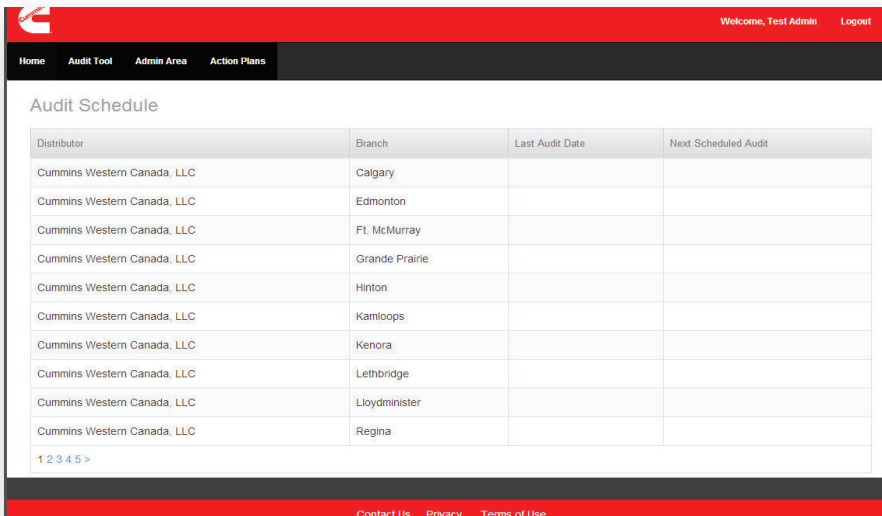
Clicking on this link will display the action plan that was submitted.

>> Reporting Problems with the Tool

Click the Contact Us link at the bottom of the Home page.

On the Contact Us page, click the mail envelope. This will open your email and provide you with a template to report the issue and the email will be populated with the recipient distribution.quickserve@cummins.com.

Quick Reference Sheets

>> In-Shop Process—U.S. Version

QUICK REFERENCE SHEET

QuickServe® 7-Step In-Shop Process

STEP 1 GREET THE CUSTOMER

Who Service Writer / Service Supervisor

What
- Customer greeted
- Complete customer interview using the *Customer Interview Wizard (CIW)*
  - If customer calls, create an Appointment and select for Scheduling
  - Inform customer of scheduled time and appointment number
- Work Order will be created upon arrival.
- Work Order created:
  - Work Order designated ASAP if required
- Diagnostic SRTs are added to the Work Order
- Work Order is selected for scheduling
- Technician is assigned
- Start time is reviewed with customer
- Assess the personal needs of the customer
- Communicate to customer engine warranty coverage, or lack of
- Verify method of payment with customer
- Check customer's credit balance
- Verify contact information:
  - First and last name
  - Method of contact
  - Accurate call numbers
- Ensure that assigned technician understands the commitments made to the customer.

As a Result of Completing Step 1
Interview completed using the *Customer Interview Wizard (CIW)*
Work Order or Appointment completed
Interview details are in the Work Order comments
ASAP box is set correctly
Scheduled (start) date/time is set
Unit/product scheduled and assigned
Diagnostic job plan set
Proper Comments on Work Order
Customer's personal needs are properly handled
Accurate contact information is obtained
WO status is updated to T/S waiting to start

Tools Used to Complete Step 1
Customer Interview Wizard (CIW)—THE STARTING POINT
Work Order Quote (WOQT)—for Diagnostics
Appointments form—for events more than 24 hours from the time we take the call
Service Scheduler—assigns diagnostic technician to the event and start time

STEP 2 DIAGNOSE THE EQUIPMENT

Who Technician / Parts Professional

What
- Technician is assigned to the WO
- Job Safety Assessment Form is completed
- Technician performs equipment inspection (for damage, etc.), and captures ESN, CPL, and miles/hours
- Technician completes troubleshooting within SRT guidelines
- Technician develops the best diagnostic approach including:
  - Customer Complaint/Symptoms
  - Time to diagnose
  - Parts likely to be needed for repair
- Obtain technical support as needed via the Technical Escalation Process
- Documents troubleshooting results (specs, ECM downloads)
- Technician contacts Service Supervisor on cause of failure
- Supervisor updates product information including hours, model, etc., as needed
- Parts professional communicates parts availability to the service supervisor and the service writer so they can communicate to the customer
- Technician clocks out of the WO and selects the next scheduled event in daily work plan
- Service Supervisor updates comments with troubleshooting results when appropriate

As a Result of Completing Step 2
Diagnostic plan available for Technician
Appropriate repair strategy determined
Parts and items required/availability determined
Warranty coverage determined
Technician payroll record updated
Troubleshooting results are recorded on the Work Order
Work Order status is updated to *T/S in Progress*

Tools Used to Complete Step 2
Shop Management System
QSOL Diagnostic Steps
Labor allocation
Work Order Comments
Technical Escalation Process
Technical Library
Expert Diagnostic System (EDS)
Mechanical and electronic diagnostic tools

I am Cummins. **You can depend on me.**

QuickServe® 7-Step In-Shop Process

STEP 3 — DEVELOP THE QUOTE / REPAIR PLAN

Who Service Supervisor / Parts Professional

What
- Troubleshooting completed
- Failure code is applied to the Work Order
- Repair options discussed with Technician
- Gathers all facts on diagnosis from the technician
- Check the CSP application for a Customer Support Plan if:
  - You know or suspect the customer does business with multiple distributors; or
  - Your company has created a Support Plan for this customer
- Quote(s)/Repair plan developed
  - Use Standard Quote (LSQ or NSQ) if available OR Manually create a repair plan (SRTs)
- Parts and items added by Parts Professional
- Warranty header completed if applicable
- Supervisor completes warranty allocations
- Comments: *Cause, Correction, Coverage* are updated
- Review repair schedule and update Work Order
- Determine if a warrantable repair
  - If yes, allocate all appropriate labor and parts to the claim
  - If no, determine customer remaining credit level
- Check open orders to ensure available credit
- Service Supervisor signs off on quote/repair plan
- Obtain policy decision if applicable (per local guidelines)
- Prepare to review the plan with the customer contact for approval

As a Result of Completing Step 3
Repair plan completed
Total repair time known
Parts availability known
Warranty allocation is determined, when appropriate
Claim details are entered
Credit level is known
Complaint, Cause, Correction, Coverage are captured
Work Order Status is updated to Quote waiting approval

Tools Used to Complete Step 4
WO → *WOQT* Button
NSQ/LSQ Import OR Job Plan Button (Repair SRTs)
Items Button (Repair items)
Total Button (Miscellaneous Charges)
Schedule Date and Time
Promised Date and Time
Warranty Tab
Available Credit
Local Policy Guidelines

STEP 4 — COMMUNICATE THE QUOTE

Who Service Supervisor or Service Writer / Advisor

What
- Contact the customer to discuss the quote and whether the repair will be warrantable or charged
- Provide customer with options for the repair
- Customer decision to *Accept* or *Reject* the quote
  - If *accepted*, assign Technician per schedule
  - If *rejected*, close and invoice for diagnostic time
  - If *customer is not available*, hold until contact is made or proceed with repairs only with prior approval
- Confirm payment method
- Customer has 24 hours to approve the quote
- Upon approval select Work Order for scheduling, and assign repair Technician through Service Scheduler
- Ensure that the repair technician understands the commitments made to the customer

As a Result of Completing Step 4
Accept or reject of quote
Reason recorded when rejected
Quote approved to a Work Order
Payment method known and indicated on Work Order
Repair Technician is assigned, start time is determined based on capacity
Service Scheduling is updated with new assignment
Upon approval, Work Order Status is updated to *Repair Waiting to Start*

Tools Used to Complete Step 4
Accept Button (Converts WOQT to WO), OR
Reject Button
- If reject, enter *Lost Sale* reason code

STEP 5 — CARRY OUT THE REPAIR

Who Technician / Parts Professional / Service Supervisor

What
- Obtain the required parts from the service truck
- Technician clocks in on WO
- Completes Job Safety Assessment Form
- Parts are delivered to the work area
- If changes are made to repair plan:
  - Talks with Service Supervisor regarding any changes
  - Service Supervisor develops a new quote
  - Customer contacted
  - Parts Professional to order additional parts and items as required
- Carries out the repair
- Technician initiates technical escalation process as needed
- Document the work performed (Cause, Correction, ECM download if applicable, failure code)
- Technician cleans work area
- Technician clocks out of WO
- Technician allocates labor to SRT plan
- Technician indicates repair is completed
- Technician selects the next event in Service Scheduler for their daily work plan and clocks in

As a Result of Completing Step 5
A completed repair with all items recorded on the Work Order
Technician time is applied and allocated
Payroll is updated
Any changes to the repair plan have been identified and discussed with the customer
"Re-quote" when necessary
Work area is clean and prepared for next event
Service Scheduling is updated for completed event
Work Order status is updated to *Work in Progress*
Work Order status is updated to *Completed* when Technician clocks out of WO

Tools Used to Complete Step 5
Shop Management
WOQT—(updated event details)
Labor Allocation in BMS
Local guidelines for Technician Escalation Process
Job Safety Assessment Form

QuickServe® 7-Step In-Shop Process

STEP 6 — INVOICE THE CUSTOMER

Who Service Supervisor or Service Writer / Advisor

What ■ Review all Work Order details including the following:
- Comments
- Labor allocations
- Claims allocations
- Core charges applied

■ Review and complete QuickServe Work Order Summary screen
■ Close Work Order
■ Print invoice and/or transmit warranty claim

As a Result of Completing Step 6

Claim transmitted
Invoice generated
Invoice (equal to or less than quoted amount)
Fax, e-mail or mail invoice to the customer
Technician payroll record completed
Technician Efficiency reporting
ISQS datamart updated
Comments are correct
Failure code applied
QS Reasons have been recorded for events that don't meet the RECT delivery limits
Work Order status is updated to *Repair Complete*

Tools Used to Complete Step 6

BMS

STEP 7 — FINAL CUSTOMER COMMUNICATION

Who Service Supervisor or Service Writer / Advisor

What ■ Contact customer on completed repair and ask customer when unit will be picked up
■ Review the invoice with the customer and explain the work that was completed
■ Explain any coverage applied to the repair
■ Inquires if there are any questions or concerns
■ Indicate that customer may receive survey to gauge their satisfaction
■ QSNPS survey performed, later, as appropriate by third party
■ Bring the unit to the shop entrance
■ *Thank the customer for their business*

As a Result of Completing Step 7

Work Order status is updated to *Invoiced*
Customer is notified unit is ready and confirms payment
Repaired unit is brought to the customer
Customer is thanked

Tools Used to Complete Step 7

Work Order and invoice
The PO field when appropriate

Dependable Products Deserve
Dependable Service

QUICK REFERENCE SHEET
QuickServe® 8-Step Mobile Process

STEP 1 — GREET THE CUSTOMER

Who — Service Writer / Service Supervisor

What
- Receive customer call
- Customer greeted
- Use the *Customer Interview Wizard (CIW)* to capture the following:
  - Complaint Information (Repair or Maintenance Event)
  - Customer Information
  - Unit Information
- Request whether or not special access to customer location is needed
- Use the Customer Interview Wizard (CIW) to setup one of the following:
  - Work Order Quote (WOQT)
    — If an emergency repair, check the ASAP indicator
    — If non-emergency repair, uncheck the ASAP indicator
    — Determine the availability of parts most likely to be needed for the repair
    — Check service history, if required
    — Determine the availability of a qualified technician
    — Determine the availability/timing of transportation for the technician, tools and parts
    — Scheduled Date and Time set to appropriate date and time
  - Assemble the Diagnostic Job Plan. This is the plan to get the Technician to the work site
    — Admin
    — Travel (estimate of travel time)
    — Diagnostic
  - Diagnostic Quote estimate communicated to the customer
    — Determine and verify customer payment information
    — Check customer's credit balance
  - If customer accepts the quote details, convert the WOQT to a WO
- Communicate warranty coverage to customer, if any
- Ensure that assigned technician understands the commitments made to the customer
  - Work Order (WO)
  - Appointment (ForFuture Service)
    - Set up appointments for any events more than 24 hours from the time we take the call

As a Result of Completing Step 1
An interview is completed using the *Customer Interview Wizard (CIW)*
A Work Order Quote (WOQT) is created which defines the charges for us to travel and complete the diagnostics
We have established whether the repair is an emergency or not
We have established the Scheduled Date and Time
We have established whether the event is an Appointment for a future date
We have communicated a quote for diagnosis to the customer

Tools Used to Complete Step 1
Customer Interview Wizard (CIW)—THE STARTING POINT
Work Order Quote (WOQT)—for Diagnostics
Appointments form—for events more than 24 hours from the time we take the call

STEP 2 — STAGE THE REPAIR

Who — Service Supervisor and Parts Professional

What
- Determine if parts will be sent with the Technician
  - If yes, determine parts availability
    - Check parts availability and transfer to truck sub-location as necessary using the *Sub Location Transfer* form
    - Order parts as necessary
    - Print pick ticket and stage parts
- If parts not available, service supervisor and/or service writer communicates availability date to the customer
- Select the WO for Service Scheduling by selecting the *Scheduling* tab on the Work Order
- Technician availability date and time is determined
- Appropriate service tools and information are available in the vehicle
- Contact customer to communicate date and time of Technician's arrival
- *Response Plan Complete* checkbox selected
  - *Objective:* 30 minutes or less
- Open the *Mobile WO Assignments* form, assign to scheduled Technician
- Ensure that technician complies with local process requirements (safety training and gear, immigration status, etc.)

If an Appointment Was Set During Step 1
Determine appointments for a specific day and date and create Work Orders for those appointments
Open the *Mobile WO Assignments* form, and assign to appropriate Technician

As a Result of Completing Step 2
We have established a parts list to be taken by the Technician
We have moved any potential parts to the field service truck sub-location
We have determined parts we do not have on hand and availability
We have determined potential delays
We have contacted the customer with the date and time of arrival
We have established Technician assignment
We have sent Work Order detail to the Technician via wireless
We have established the *Response Plan Complete* measure

Tools Used to Complete Step 2
Item Inquiry form
Sub Location Transfer form
Service Scheduler
Work Order form (*Response Plan Complete* checkbox)
Mobile Work Order Assignments form

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QuickServe® 8-Step Mobile Process

STEP 1 — GREET THE CUSTOMER

Who — Service Writer / Service Supervisor

What
- Receive customer call
- Customer greeted
- Use the *Customer Interview Wizard (CIW)* to capture the following:
  - Complaint Information (Repair or Maintenance Event)
  - Customer Information
  - Unit Information
- Request whether or not special access to customer location is needed
- Use the Customer Interview Wizard (CIW) to setup one of the following:
- Work Order Quote (WOQT)
  - If an emergency repair, check the ASAP indicator
  - If non-emergency repair, uncheck the ASAP indicator
  - Determine the availability of parts most likely to be needed for the repair
  - Check service history, if required
  - Determine the availability of a qualified technician
  - Determine the availability/timing of transportation for the technician, tools and parts
  - Scheduled Date and Time set to appropriate date and time
  - Assemble the Diagnostic Job Plan. This is the plan to get the Technician to the work site
    - Admin
    - Travel (estimate of travel time)
    - Diagnostic
  - Diagnostic Quote estimate communicated to the customer
    - Determine and verify customer payment information
    - Check customer's credit balance
  - If customer accepts the quote details, convert the WOQT to a WO
- Communicate warranty coverage to customer, if any
- Ensure that assigned technician understands the commitments made to the customer
- Work Order (WO)
- Appointment (ForFuture Service)
  - Set up appointments for any events more than 24 hours from the time we take the call

As a Result of Completing Step 1
An interview is completed using the *Customer Interview Wizard (CIW)*
A Work Order Quote (WOQT) is created which defines the charges for us to travel and complete the diagnostics
We have established whether the repair is an emergency or not
We have established the Scheduled Date and Time
We have established whether the event is an Appointment for a future date
We have communicated a quote for diagnosis to the customer

Tools Used to Complete Step 1
Customer Interview Wizard (CIW)—THE STARTING POINT
Work Order Quote (WOQT)—for Diagnostics
Appointments form—for events more than 24 hours from the time we take the call

STEP 2 — STAGE THE REPAIR

Who — Service Supervisor and Parts Professional

What
- Determine if parts will be sent with the Technician
  - If yes, determine parts availability
  - Check parts availability and transfer to truck sub-location as necessary using the *Sub Location Transfer* form
  - Order parts as necessary
  - Print pick ticket and stage parts
- If parts not available, service supervisor and/or service writer communicates availability date to the customer
- Select the WO for Service Scheduling by selecting the *Scheduling* tab on the Work Order
- Technician availability date and time is determined
- Appropriate service tools and information are available in the vehicle
- Contact customer to communicate date and time of Technician's arrival
- *Response Plan Complete* checkbox selected
  - *Objective:* 30 minutes or less
- Open the *Mobile WO Assignments* form, assign to scheduled Technician
- Ensure that technician complies with local process requirements (safety training and gear, immigration status, etc.)

If an Appointment Was Set During Step 1
Determine appointments for a specific day and date and create Work Orders for those appointments
Open the *Mobile WO Assignments* form, and assign to appropriate Technician

As a Result of Completing Step 2
We have established a parts list to be taken by the Technician
We have moved any potential parts to the field service truck sub-location
We have determined parts we do not have on hand and availability
We have determined potential delays
We have contacted the customer with the date and time of arrival
We have established Technician assignment
We have sent Work Order detail to the Technician via wireless
We have established the *Response Plan Complete* measure

Tools Used to Complete Step 2
Item Inquiry form
Sub Location Transfer form
Service Scheduler
Work Order form (*Response Plan Complete* checkbox)
Mobile Work Order Assignments form

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STEP 1 — GREET THE CUSTOMER

Who Service Writer / Service Supervisor

What
- Receive customer call
- Customer greeted
- Use the *Customer Interview Wizard (CIW)* to capture the following:
  - Complaint Information (Repair or Maintenance Event)
  - Customer Information
  - Unit Information
- Request whether or not special access to customer location is needed
- Use the Customer Interview Wizard (CIW) to setup one of the following:
- Work Order Quote (WOQT)
  — If an emergency repair, check the ASAP indicator
  — If non-emergency repair, uncheck the ASAP indicator
  — Determine the availability of parts most likely to be needed for the repair
  — Check service history, if required
  — Determine the availability of a qualified technician
  — Determine the availability/timing of transpotation for the technician, tools and parts
  — Scheduled Date and Time set to appropriate date and time
  - Assemble the Diagnostic Job Plan. This is the plan to get the Technician to the work site
    — Admin
    — Travel (estimate of travel time)
    — Diagnostic
  - Diagnostic Quote estimate communicated to the customer
    — Determine and verify customer payment information
    — Check customer's credit balance
  - If customer accepts the quote details, convert the WOQT to a WO
- Communicate warranty coverage to customer, if any
- Ensure that assigned technician understands the commitments made to the customer
- Work Order (WO)
- Appointment (ForFuture Service)
  - Set up appointments for any events more than 24 hours from the time we take the call

As a Result of Completing Step 1
An interview is completed using the *Customer Interview Wizard (CIW)*
A Work Order Quote (WOQT) is created which defines the charges for us to travel and complete the diagnostics
We have established whether the repair is an emergency or not
We have established the Scheduled Date and Time
We have established whether the event is an Appointment for a future date
We have communicated a quote for diagnosis to the customer

Tools Used to Complete Step 1
Customer Interview Wizard (CIW)—THE STARTING POINT
Work Order Quote (WOQT)—for Diagnostics
Appointments form—for events more than 24 hours from the time we take the call

STEP 2 — STAGE THE REPAIR

Who Service Supervisor and Parts Professional

What
- Determine if parts will be sent with the Technician
  - If yes, determine parts availability
  - Check parts availability and transfer to truck sub-location as necessary using the *Sub Location Transfer* form
    - Order parts as necessary
    - Print pick ticket and stage parts
- If parts not available, service supervisor and/or service writer communicates availability date to the customer
- Select the WO for Service Scheduling by selecting the *Scheduling* tab on the Work Order
- Technician availability date and time is determined
- Appropriate service tools and information are available in the vehicle
- Contact customer to communicate date and time of Technician's arrival
- *Response Plan Complete* checkbox selected
  - *Objective:* 30 minutes or less
- Open the *Mobile WO Assignments* form, assign to scheduled Technician
- Ensure that technician complies with local process requirements (safety training and gear, immigration status, etc.)

If an Appointment Was Set During Step 1
Determine appointments for a specific day and date and create Work Orders for those appointments
Open the *Mobile WO Assignments* form, and assign to appropriate Technician

As a Result of Completing Step 2
We have established a parts list to be taken by the Technician
We have moved any potential parts to the field service truck sub-location
We have determined parts we do not have on hand and availability
We have determined potential delays
We have contacted the customer with the date and time of arrival
We have established Technician assignment
We have sent Work Order detail to the Technician via wireless
We have established the *Response Plan Complete* measure

Tools Used to Complete Step 2
Item Inquiry form
Sub Location Transfer form
Service Scheduler
Work Order form (*Response Plan Complete* checkbox)
Mobile Work Order Assignments form

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QUICK REFERENCE SHEET

QuickServe® 7-Step In-Shop Process

STEP 1 GREET THE CUSTOMER

Who Service Writer / Service Supervisor

What
- Customer greeted
- Complete customer interview using the *Service Advisor Complaint Sheet*
  - If customer calls, create an Appointment
  - Inform customer of scheduled time
  - Work Order will be created upon arrival.
- Check the CSP web application for a Customer Support Plan if:
  - You know or suspect the customer does business with multiple distributors; or
  - Your company has created a Support Plan for this customer
- Work Order created:
  - Work Order designated ASAP in business system
  - Check QSOL Service Work Order Information Screen for service history, open campaigns or TRP's
- Diagnostic SRTs added to the Work Order
- Work Order is selected for scheduling
- Technician is assigned
- Start time is reviewed with customer
- Assess the personal needs of the customer
- Communicate to customer that if the event is unwarrantable, charges will be incurred
- Verify method of payment with customer (Emphasize ability to pay on front end especially for cash sales)
- Check customer's credit balance
- Check service history, if required
- Verify contact information:
  - Proper name
  - Method of contact
  - Accurate call numbers
- Ensure that assigned technician understand the commitments made to the customer

As a Result of Completing Step 1
Interview completed using the *Service Advisor Complaint Sheet*
Work Order or Appointment completed
Interview details are in the Work Order comments
ASAP box is set correctly on work order
Scheduled (start) date/time is set
Unit / product scheduled and assigned
Diagnostic job plan set
Proper Comments on Work Order
Customer's personal needs are properly handled
Accurate contact information is obtained

Tools Used to Complete Step 1
The Service Advisor Complaint Sheet—THE STARTING POINT
Job opening advice sheet
Work Order—for Diagnostics
Local Service Scheduling Tools (if applicable—assigns diagnostic technician to the event and start time

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STEP 2 DIAGNOSE THE EQUIPMENT

Who Technician / Parts Professional

What
- Technician records start time on assigned job
- Technician performs equipment inspection (for damage, etc.), and captures ESN, CPL, and miles / hours
- Technician completes troubleshooting within SRT guidelines
- Technician develops the best diagnostic approach including:
  - Customer Complaint / Symptoms
    - Time to Repair
    - Required Parts
- Obtain technical support as needed via the Technical Escalation Process
- Documents troubleshooting results (spec's, ECM downloads)
- Technician contacts Service Supervisor on cause of failure
- Supervisor updates product information including hours, model, etc.
- Parts Professional communicates job related part status changes to Service Supervisor and Service Writer so they can communicate to the Customer
- Technician records time to complete the job and selects next scheduled event in daily work plan
- Service Supervisor updates comments with troubleshooting results

As a Result of Completing Step 2
Diagnostic plan available for Technician
Appropriate repair strategy determined
Parts and Items required / availability determined
Technician payroll record updated
Troubleshooting results are recorded on the Work Order

Tools Used to Complete Step 2
QSOL Troubleshooting Trees
Labor Allocation
Work Order Comments
Service Topics
Technical Escalation Process
Technical Library

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QuickServe® 7-Step In-Shop Process

STEP 3 — DEVELOP THE QUOTE / REPAIR PLAN

Who Service Supervisor / Parts Professional

What
- Troubleshooting completed
- Failure code is applied to the Work Order
- Repair options discussed with Technician
- Gather all facts on diagnosis from the Technician
- Quote(s) / Repair Plan developed
- Create a Repair Plan (SRTs)
- Items added by Parts Professional
- Comments: *Cause, Correction, Coverage* are updated
- Review schedule and update Work Order
- Determine if a warrantable repair
  - If yes, allocate all appropriate labor and parts to the claim
  - If no, determine customer remaining credit level
  - If repair total will exceed remaining credit amount, prepare to discuss with customer or request a credit override from the Credit Department once the quote has been approved
- Service Supervisor signs off on quote / repair plan
- Obtain policy decision if applicable (per local guidelines)
- Obtain management approval on high value quotes (per local guidelines)
- Prepare to review the Repair Plan with the customer contact for approval

As a Result of Completing Step 3
Repair plan completed
Total Repair Time known
Parts Availability known
Warranty allocation is determined, when appropriate
Credit level is known
Complaint, Cause, Correction, Coverage are captured

Tools Used to Complete Step 4
Work Order
Item Inquiry
Customer Credit
Job Plan (Repair SRTs)
QSOL
Warranty Manuals
Individual Distributor Business Systems
Local Policy Guidelines
Local Guidelines for High Value Quotes

STEP 4 — COMMUNICATE THE QUOTE

Who Service Supervisor or Service Writer / Advisor

What
- Contact the customer to discuss the quote and whether the repair will be warrantable or charged
- Provide customer with options for the repair
- Customer decision to *Accept* or *Reject* the quote
  - If *accepted*, assign Technician per schedule
  - If *rejected*, close and invoice for diagnostic time
  - If *customer is not available*, hold until contact is made or proceed with repairs only with prior approval
- Confirm payment method
- Customer has 24 hours to approve the quote
- Upon approval, change Quote to a Work Order
- Launch parts order, if required
- Schedule a Technician
- Ensure that the repair technician understands the commitments made to the customer

As a Result of Completing Step 4
Accept or Reject quote
Reason recorded when rejected
Quote approved to a Work Order
Payment method known and indicated on Work Order
Required parts are ordered, if not available
Repair Technician is assigned, start time is determined based on capacity

Tools Used to Complete Step 4
Quote
Work Order

STEP 5 — CARRY OUT THE REPAIR

Who Technician / Parts Professional / Service Supervisor

What
- Technician records start time on Work Order
- Parts are delivered to the work area
- If changes to Repair Plan:
  - Talks with Service Supervisor regarding any changes
  - Service Supervisor develops a new quote
  - Customer contacted
  - Parts Professional to order additional items as required
- Carries out the repair
- Technician initiates technical escalation process as needed
- Technician completes Inspection/ Quality / Safety check sheet
- Document the work performed (Cause, Correction, ECM download if applicable, failure code)
- Technician cleans work area
- Technician records completion time on Work Order
- Technician allocates labor to SRT plan
- Technician indicates repair is completed
- Technician selects next event on work plan

As a Result of Completing Step 5
A completed repair with all items recorded on the Work Order
Technician Time is applied and allocated
Payroll is updated
Any changes to the repair plan have been identified and discussed with the customer
"Re-quote" when necessary
Work area is clean and prepared for next event

Tools Used to Complete Step 5
Work Order
Labor Allocation
Local guidelines for Technician Escalation Process
Inspection / Quality / Safety Check Sheet
Technician time card

QuickServe® 7-Step In-Shop Process

STEP 6 — INVOICE THE CUSTOMER

Who — Service Supervisor or Service Writer / Advisor

What
- Review Work Order details
- Check:
  - Comments
  - Labor allocations
  - Claims allocations
- Review and complete QuickServe Summary information
- Close Work Order
- Print Invoice and / or transmit Warranty Claim

As a Result of Completing Step 6

Claim transmitted
Invoice generated
Invoice is equal to or less than quoted amount
Fax, e-mail or mail invoice to the customer
Technician payroll record completed
Technician Efficiency reporting
Comments are correct
Failure code applied
QS Reasons have been recorded for events that don't meet the RECT delivery limits
Work Order status is updated to *Repair Complete*

Tools Used to Complete Step 6

Work Order, Invoice and / or Warranty Claim
Distributor's Business System

STEP 7 — FINAL CUSTOMER COMMUNICATION

Who — Service Supervisor or Service Writer / Advisor

What
- Contact customer on completed repair and ask customer when unit will be picked up
- Review the invoice with the customer and explain the work that was completed
- Explain any coverage applied to the repair
- Ask if there are any questions or concerns
- Request payment before release of equipment
- Indicate that customer may receive survey to gauge their satisfaction
- QSNPS survey performed, later, as appropriate by third party
- Bring the unit to the shop entrance
- *Thank the customer for their business*

As a Result of Completing Step 7

Work Order status is updated to *Invoiced*
Customer is notified unit is ready and confirms payment
Repaired unit is brought to the customer
Customer is thanked

Tools Used to Complete Step 7

Work Order and invoice
The PO field when appropriate

Dependable Products Deserve Dependable Service

QUICK REFERENCE SHEET
QuickServe ® 8-Step Mobile Process

STEP 1 — GREET THE CUSTOMER

Who Service Writer Advisor / Service Supervisor

What
- Receive customer call
- Customer greeted
- Use the *Service Advisor Complaint Sheet (SACS)* to capture the following:
  - Complaint Information
  - Customer Information
  - Unit Information
- Request whether or not special access to customer location is needed
- Check the CSP web application for a Customer Support Plan if:
  - You know or suspect the customer does business with multiple distributors; or
  - Your company has created a Support Plan for this customer
- Create a Work Order Quote (WOQT)
  - If an emergency repair, set the job as ASAP on the Work Order
  - If non-emergency repair, uncheck the ASAP indicator on the Work Order
  - Determine the availability of parts most likely to be needed for the repair
  - Check service history, if required
  - Check QSOL for open TRPs or Campaigns
  - Determine the availability of a qualified technician
  - Determine the availability / timing of transportation for the technician, tools and parts
  - Assemble the Diagnostic Job Plan. This plan includes getting the Technician to the work site.
    - Administrative
    - Travel (Estimate of travel time.)
    - Diagnostic
  - Scheduled Date and Time set to appropriate date and time
  - Diagnostic Quote communicated to the customer
    - Determine and verify customer payment information
    - Check customer's credit balance
  - If customer accepts the quote details, convert the Quote to a Work Order
  - Communicate to customer that if event is unwarrantable, charges will be incurred
  - Ensure that assigned technician understand the commitments made to the customer
  - Set-up appointments for any events more than 24 hours from the time we take the call.
    - NOTE: *This step in the QS process may include 2 calls with the customer, as it may be necessary to verify availability of technician parts, tools and transportation to the customer site before communicating a start time.*

As a Result of Completing Step 1
An interview is completed using the Service Advisor Complaint Sheet
A Work Order Quote is created which defines the charges for us to travel and complete the diagnostics
ASAP box is set correctly on the Work Order
We have established whether the repair is an emergency or not
We have established the Scheduled Date and Time
We have established whether the event is an Appointment for a future date
We have communicated a Quote for diagnosis to the customer

Tools Used to Complete Step 1
The Service Advisor Complaint Sheet — THE STARTING POINT
Job creation advice sheet

STEP 2 — STAGE THE REPAIR

Who Service Supervisor and Parts Professional

What
- Determine if parts will be sent with the Technician
  - Order parts as necessary
  - Print pick ticket and stage parts
  - Transfer parts to truck as necessary
- Parts professional communicates job related part status changes to service supervisor and service writer so they can communicate to the customer
- Place a copy of the completed service advisor complaint sheet with the technician's copy of the work order
- Technician available date and time determined
- Appropriate service tooling and information is available on the vehicle
- Contact customer to communicate date and time of Technician's arrival
- Obtain Purchase Order to secure repair on front end
- Response Plan Complete identified in system (if applicable)
  - Objective: 30 minutes or less
- Assign WO to scheduled Technician
- Ensure that technician complies with Local process requirements (safety training, safety gear, immigration status, etc.)

If an Appointment Was Set During Step 1
Determine appointments for a specific day and date and create Work Orders for those appointments
Place a copy of the completed service advisor complaint sheet with the technician's copy of the work order
Assign to appropriate Technician

As a Result of Completing Step 2
We have established a parts list to be taken by the Technician
We have moved any potential parts to the field service truck
We have determined parts we do not have on hand and availability
We have determined potential delays
We have contacted the customer with the date and time of arrival
We have established Technician assignment
We have communicated Work Order detail to the Technician
We have established the *Response Plan Complete* measure

Tools Used to Complete Step 2
Scheduling / Appointment Tool
Work Order

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QuickServe® 8-Step Mobile Process

STEP 3 — DIAGNOSE THE EQUIPMENT

Who Technician

What
- Technician records start time on assigned job, zero trip meter (KLM/Miles) and begins travel
- Technician arrives on site, records time and ends travel
- Technician greets customer on arrival and communicates repair process and repair plans / quotes as allowed in specific regions
- Technician gathers additional complaint information and requests permission to start diagnostics
- Courteous and professional response to customer requests
- Technician performs diagnostic procedures
- Obtain Technical support as needed via the Technical Escalation Process
- Technician develops the best diagnostic approach including:
  - Customer Complaint / Symptoms
  - Time to Repair
  - Required parts
- Technician communicates with customer after diagnosis to inform them of basic technical findings and that the Service Supervisor will contact them with a repair plan / quote
- Technician contacts Supervisor or Support Center (if applicable) to communicate the repair requirements and update status

As a Result of Completing Step 3
Technician is "on the clock"
Technician records travel hours and travel KLM / Miles
Technician determines failure cause and repair details
Technician and Supervisor develop a Repair Plan

Tools Used to Complete Step 3
QSOL Troubleshooting Trees
Wireless Technology (if available)
Technical Escalation Process
Travel Log / Record

STEP 4 — DEVELOP THE QUOTE / REPAIR PLAN

Who Service Supervisor / Technician

What
- Service Supervisor interviews the Technician
- Ensure that all facts on diagnosis are gathered from the Technician to develop repair plan and quote
- If an appointment was set during STEP 1, and a Work Order was established during STEP 2, convert the work order to a quote
- Access original quote and build a repair plan including the following:
  - Repair SRTs (for non-SRT families, flex SRT with required labor hours.) Use GSQ where appropriate
  - Required parts
- Supervisor and Technician discuss the quote for accuracy
- Service Supervisor signs off on quote / repair plan
- If parts needed are not available, parts delivery date is determined
- Establish tentative date for final repair. Update the *Promised Date and Time* on the Quote to this tentative repair date
- Determine if a warrantable repair:
  - If yes, allocate all appropriate labor and parts to the claim
  - If no, determine customer remaining credit level
  - If repair total will exceed remaining credit amount, prepare to discuss with customer or request a credit override from the Credit Department once the quote has been approved
- Obtain policy decision if applicable (per local guidelines)
- Obtain management approval on high value quotes (per local guidelines)

As a Result of Completing Step 4
The repair plan SRTs are developed and entered
Appropriate parts have been identified and applied
Delivery date of backordered parts is determined
Promised Date and Time is updated
Warranty allocation is determined (when appropriate)
Customer's credit level is determined
Method of payment is determined

Tools Used to Complete Step 4
Work Order
Item Inquiry
Customer Credit Inquiry
QSOL
Warranty Manuals
Individual Distributor Business Systems
Local Policy Guidelines
Local Guidelines for High Value Quotes

STEP 5 — COMMUNICATE THE QUOTE

Who Service Supervisor or Service Writer / Advisor

What
- Contact the customer to discuss the quote and whether the repair will be warrantable or charged
- Review the failure and repair details
  - Any coverage applied to the event
  - Any delays due to parts shortages
  - Any delays due to Technician shortages
- Review price with the customer
- If remaining credit is insufficient to cover the new repair, discuss payment of current open invoices or payment method for this event
- Communicate quote approval hold is 24 hours. Upon approval, change Quote to a Work Order
- Launch parts order, if required
- Schedule a Technician if needed
- Ensure that assigned technician understand the commitments made to the customer
- Inform the Technician to remain on site to complete the repair (if possible)

As a Result of Completing Step 5
Customer contact is informed of the repair details
Payment method is agreed upon
Quote is approved by the customer
Event is selected for scheduling
Required parts are ordered, if not available
Technician is assigned
If technician is at the site, he is advised of customer acceptance or rejection of quote

Tools Used to Complete Step 5
Quote
Work Order
Customer Credit
Wireless Technology (if available)

QUICK REFERENCE SHEET

QuickServe 8-Step Mobile Process

STEP 6 — CARRY OUT THE REPAIR

Who Technician

What
- Obtain the required parts from the service truck
- Technician greets customer on arrival and communicates repair
- Courteous and professional response to customer requests
- Complete the repair
  - Communicate any changes in the repair plan to the Service Supervisor
- Complete the repair
  - Communicate any changes in the repair plan to the Service Supervisor
- Initiate technician escalation process as needed
- Technician completes Inspection / Quality / Safety check sheet
- Document the following:
  - Cause
  - Correction
  - Expenses (miles traveled, tolls, lodging, etc.)
  - Labor entries
- Technician completes (or prints) site worksheet and reviews with the site contact
- Technician advises supervisor or Support Center (if applicable) of repair completion
- Technician selects next Work Order, *Records start time and beginning travel mileage*

As a Result of Completing Step 6
Technician has recorded time applied on the repair
Any changes to the repair plan are communicated to the Supervisor
Repair comments are documented
Time and job status are updated as required
Worksheet is completed (or printed) at the site
Technician sends all repair details back to Service Advisor
Technician begins next work assignment

Tools Used to Complete Step 6
Wireless Technology (if applicable)
Technician Escalation Process
Inspection / Quality / Safety Check Sheet
Technician time cards
Travel log / records

STEP 7 — INVOICE THE CUSTOMER

Who Service Supervisor or Service Writer / Advisor

What
- Review all Work Order details including the following:
  - All parts are listed on the Items form
  - Labor SRTs are correct
  - Actual labor has been allocated
  - Travel charges have been applied
  - Warranty claim is correct, if applicable
  - Warranty claim is set to transmit, if applicable
  - Appropriate comments including Complaint, Cause, Correction and Coverage are completed
  - Core charges are applied

As a Result of Completing Step 7
Work Order review is completed
Warranty claim review is completed if applicable
All comments as they should appear on the invoice are updated as required
Labor application to the Job Plan is validated
Technician payroll records are updated
Customer Invoice is created
Invoice is equal to or less than quoted amount
QS Reasons have been recorded for events that don't meet the RECT delivery limits

Tools Used to Complete Step 7
Local Monitoring Tools
Work Order, Invoice and / or Warranty Claim
Miscellaneous Charges form
Distributor Business System

STEP 8 — FINAL CUSTOMER COMMUNICATION

Who Service Supervisor or Service Writer / Advisor

What
- Contact the customer representative to inform them of completed repair and invoice total
  - Obtain purchase order when appropriate
  - Indicate that customer may receive survey to gauge their satisfaction
  - A Transactional NPS survey performed, later, as appropriate by third party
  - *Thank the customer for their business!*

As a Result of Completing Step 8
Completed repair is reviewed with the customer
Required PO is obtained
Final price is communicated
Customer is thanked for their business!

Tools Used to Complete Step 8
Work Order / Invoice
The PO field, when appropriate

QuickServe Playbook

What is Gap Analysis and Where Should We Begin?

Gap Analysis is all about evaluating and improving business performance. A gap is a space or opening — in management terms it is the space between where you are and where you want to be.

>> Gap Analysis Compared to Navigation

Gap Analysis can be compared to navigation or map reading… first you need to identify where you are, then you can plan where you want to be and how you want to get there.

The basic principles of navigation haven't changed since the Phoenicians, Christopher Columbus, Captain James Cook and so many others were able to explore and navigate with only crude instruments and even more crude charts. Sometimes they even had to make up the charts as they went along!

It didn't really matter if Columbus was a few miles off in getting back to Spain, or Cook missed the exact entrance to Plymouth harbor - they could adjust once they had the familiar land in sight. That was their gap analysis.

>> Developing an Action Plan

Once your Gap Analysis produces agreement on say three to five issues that have impact and need improvement we will be ready to chart a new course of action, or produce an Action Plan. In business, a good Action Plan should contain:

- Key objectives
- Resources allocated to get the job done
- Ownership — Who is responsible?
- Milestones — Like navigation way-points
- A specific due date
- Key measurements

>> Why do a Gap Analysis Before QuickServe Implementation?

- QuickServe requires tools, information and human resources to enable specific roles
- A gap analysis prior to implementation will help to identify what is required for an effective implementation of the program

>> What Elements are evaluated on the Gap Analysis?

- QuickServe Resources & Roles Defined

- Employee skill sets/ certifications vs. defined QuickServe Roles

- Tech/Admin Ratios

- Equipment needs for technicians

- Parts support

- Training needs (warranty, engine certification, etc.)

- Resources must be in place before process implementation

>> Implementation Teams

Every branch should develop an Implementation Team with key members of the organization to assist with implementation. All people should be involved in the work flow.

These team members should include:

- Branch Manager

- Service Manager

- Parts Professional

- Other members of the Service Department such as administrative assistant

- Technicians

>> Elements to be evaluated in Gap Analysis Prior to QuickServe Implementation

Human Resources

- Define employee skill sets/certifications versus defined QS Roles

- Key Service Positions in place (appropriate number of head count, align to branch structure)

  a. Service Writer/Advisor

  b. Service Supervisor

  c. Parts Professional

  d. Qualified Technicians to support existing engines in territory

- All key positions are aware of roles/responsibilities per position profiles

- Process Champion identified

- 3:1 Admin Ratio

- Distributor Senior Management has conducted Vision Training for all branches employees 2-4 weeks prior to QS Certification Training

- Someone has been identified at the branch to collect KPIs

Facilities

- Technician Resource 'Library' accessible to all Workshop Personnel

- Housekeeping levels in accordance with Excel

- Parts professional within service facility

Training and Processes

- Technical escalation process fully understood by technicians

- Basic computer training for all technicians

- Warranty training for appropriate personnel

- JSA Safety training for all service personnel. **

- QuickServe Qualifications Deployed at branch: service advisors, service supervisor, parts professional, service supervisors

- QuickServe CLC On-Line Training done by branch service administrative staff
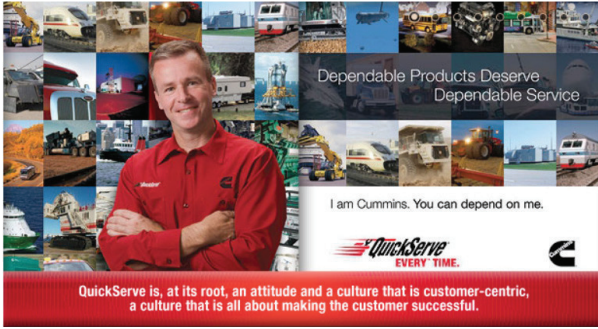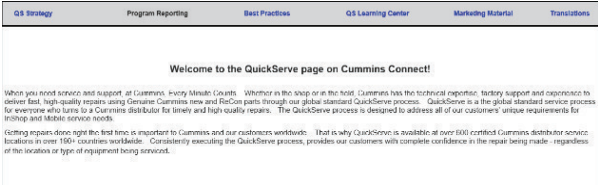
Hardware

- Workshop PC's in place for Service Supervisor

- Workshop Laptop(s) in place (One per Team)

- Field Laptops for field technicians (One per Service Truck)

- Software

- All relevant software and databases loaded onto the appropriate PC's

- Workshop Desktops:

  a. QSOL

  b. Email (if applicable)

  c. IMS

- Workshop Laptops

  a. Insite

  b. Inpower

  c. EDS

- Field Service Laptops

  a. QSOL / DVD

  b. Email (if applicable)

  d. Insite

  e. Inpower

  f. EDS

- All 'sign-on's' available to ensure Service Supervisor and Technicians can gain access
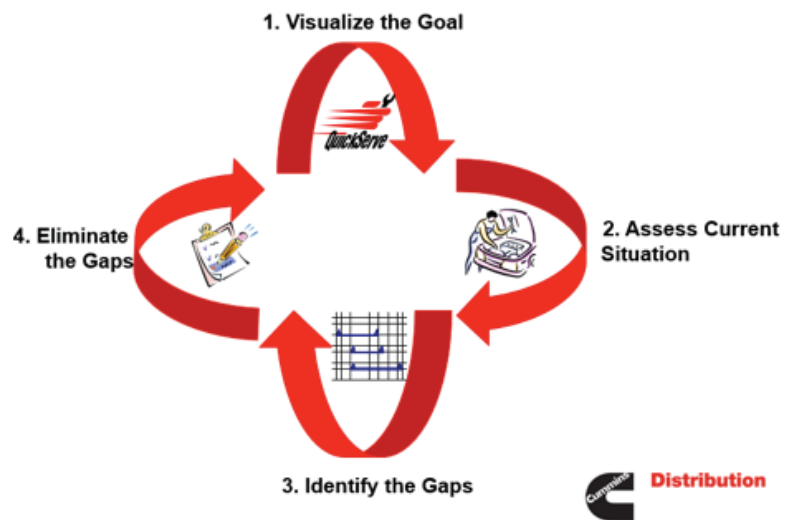
Quick Reference Tools and Resources Table

The following materials may be accessed via connect.cummins.com or distribution.cummins.com. See also Chapter 7 for additional details about tools and resources available.

	QuickServe Portal Designed for our independent and JV partners, the QuickServe Portal offers access to over 100 pieces of information related to the QuickServe process: Tools, Tips of the Month, Quarterly e-Zine, regional Success Stories, KPI Overview Videos, QuickServe Process Training, Marketing posters, to name a few. Please use this valuable platform to inspire, equip and empower your team to continue the journey toward Legendary Service!
	QuickServe Cummins Connect Designed for our company owned distributors, this QuickServe Community site offers access to over 100 pieces of information related to the QuickServe process: Tools, Tips of the Month, Quarterly e-Zine, regional Success Stories, KPI Overview Videos, QuickServe Process Training, Marketing posters, to name a few. The community also has capability to post blogs and get interaction with other global QuickServe leaders. Please use this valuable platform to inspire, equip and empower your team to continue the journey toward Legendary Service!
	QuickServe Strategy Video that explains the key elements of the QuickServe Functional Strategic Initiative on 2014 and moving forward.

QuickServe Process Basics: e-Learning Course

This 1 hour online course covers the fundamentals of adhering to the QuickServe process and the impact one employee can have on the entire customer service interaction. In this interactive free training module, students have the opportunity to play the role of both a customer and a service employee in a service situation. As a reminder, this course is required for all Service Administrative employees to complete on a yearly basis.

QuickServe Promotional Video
Video intended to be shown both internally and externally which shows the key elements of QuickServe from a customers' perspective.
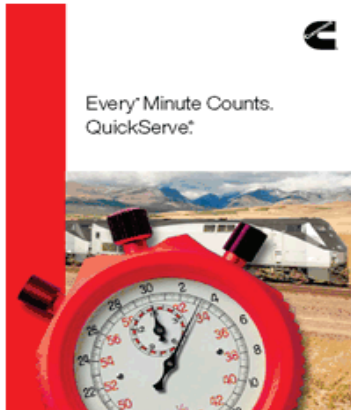
QuickServe Marketing Collateral
The new marketing collateral is externally focused and promotes the benefits of the QuickServe process to our customers. This material was developed with the new global tag line of: Every Minute Counts. Material available consists of Customer Flyers, Customer Posters, Internal Posters, In-Shop Banner, Promotional Video, and updated Distributor Website Content.

KPI Overview Videos

These short video segments are intended to reinforce the understanding of each of the Service metrics, while providing additional information on the practical interpretation of them in terms of profitability and efficiency of the service operation. There are seven KPI Overview Videos available: Work-in-Progress (WIP), Paper-in-Process (PIP), Billing Efficiency, T/B Ratio, Labor Utilization, Productivity, and Absorption Rate.

Capacity Planning Calculator

The Capacity Planning Calculator has two modules. Module 1 looks at a distributor's AOP Service Sales and calculates the appropriate number of technicians needed to reach AOP levels. While Module 2 looks at the number of technicians you currently have, or planning to have, and the impact on a distributors AOP Service Sales.

We highly encourage the use of this tool in every distributor's AOP submission.

Technician Recruitment Calculator

This tool assists distributors to document a business case on their request for additional technicians. This tool considers both Productivity and Financial Measures to provide an evaluation by assessing the current business environment against planned levels.
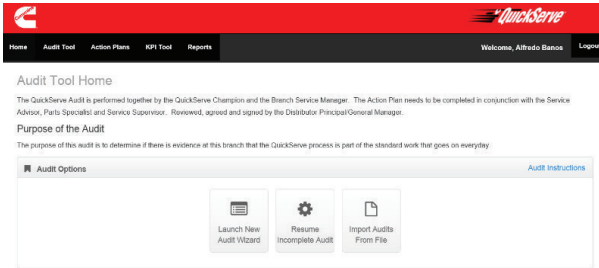
QuickServe Web Audit Tool

The QuickServe Web Audit Tool offers the ability to measure the execution of the QuickServe process in a branch operation. The tool has reporting capability to allow QuickServe Champions and QuickServe Process Leaders to analyze process performance at a branch, distributor and regional level. This tool also allows for further analysis by: Market, QuickServe Customer Meter, and Technician Certification to name a few. The tool also offers KPI storage and reporting functionality that allows for trending of this data.

QuickServe Playbook

Service Process Guide that provides detailed information to QuickServe Champions and Process Leaders on every aspect of the capability maturity model. The 16 chapter guide provides insight on how to launch the process at the branch to how to optimize it.

QuickServe Internal Posters

In addition to the External Posters, we have developed two Internal Posters which focus on the message of personal commitment to make the execution of the process successful. These should be used to help garnish internal awareness and support for reinforcing QuickServe as the only service process for Cummins distributors.

QuickServe Process Video

This award winning video was created by Cummins Western Canada to both inspire and reinforce the steps of the QuickServe In-Shop process. Two versions of the video have been developed:

1. North America Version: Includes information around their local business system (BMS)

2. International Version: the same video, without the BMS references

KPI Roadmap Tool

Interested on ideas on how to improve on a KPI? The KPI Roadmap Tool has more than eighty Six Sigma projects compiled in an interactive way to display the results obtained and findings discovered by other distributors on each of the service metrics.

Promotional Video

The promotional video was created to promote the benefits of the QuickServe Process from the customer's perspective. The video touches on the five major attributes of the process:

1. Personalized Service
2. Fast Response and Diagnosis
3. Precise Answers to Your Service Needs
4. High Quality Repairs
5. Ongoing Communications

WBT Course

Re-Registering for WBT Course
Cummins Learning Center

_____

(**Not all courses allow for subsequent registration after completion, see Re-launch from Transcript instructions if you receive registration error)**

Learner

When to use:
Some courses are set up to allow multiple registrations per learner. Use the steps below to re-register for a previously completed course.

Before you begin:
To re-register for a completed course you need to have an active Cummins Learning Center account.

What you need:
You need to have learner access to Cummins Learning Center.

Re-register for Completed Course

Follow the steps in the table below to re-register for a previously completed web-based course.

Step	Action
1	Navigate to https://learn.cummins.com/ and log-in using your WWID and regular LDAP/CED password
2	From the Cummins Learning Center *Home page*, locate the Knowledge Center and add your search criteria (ex. name or number of course)
3	On the page that loads, click on *Launch* by the offering you want to retake

4	A warning page will load informing you that you have already registered for the offering, and ask if you are sure you want to register again. Click *Continue Registration*.
	You are already registered for this offering. Are you sure you want to register again? Current Enrollments and completed course items 	Name	Registered On	Actions
------	---------------	---------
9113 - Cummins QuickServe Process Basics	01/10/2013	View Completed Course Item
9113 - Cummins QuickServe Process Basics	01/27/2014	View Completed Course Item	 Back to Search Results Continue Registration
5	Click on either of the Launch buttons on the page that loads
	9113 - Cummins QuickServe Process Basics (00002770) SPECIAL INSTRUCTIONS: For complete details about this learning offering, click all tabs below. The Main tab contains information such as the length of the course, cost (if any) and if Instructor Led, dates, times and location. The Learning Assignments tab contains any other assignments to be completed (e.g. pre-/post-work) as well as the room assignment (click View All Sessions and open any attachments). Launch Back Delivery Type Web Based (WBT) Description Basic QuickServe Process training **More Actions** Go to In-Progress Learning Request Offering View Confirmation Back to Search Results Drop Main Learning Assignments Associated Learning Completion Status Not Evaluated Score 0 **Learning Assignments** Modify Table | Module	Requirement	Details	Completion Status	Completed On	Actions
--------	-------------	---------	-------------------	--------------	---------
Cummins QuickServe Process Basics	Required	Attempts Allowed: Unlimited	Not Evaluated		Launch	
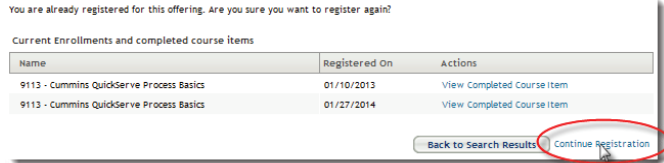
Generic QuickServe Champion Job Profile

Function

■ To lead the implementation and ongoing performance improvement of
the QuickServe Process within the relevant region.

■ Ensure QuickServe process consistency across the region by supporting branches and conducting
QuickServe audits to identify and correct gaps preventing the execution of the process.

■ To be ongoing Support to Service Departments throughout your Region, Relating to
the day to day operations and ensuring we achieve corporate goals on:

  • QuickServe Process Compliance

  • Service DBU Scorecard

  • QuickServe Customer Meter

  • Repair Timeliness Customer Measure

  • Work In Progress (WIP) Inventory,

  • Labour Management Metrics

  • Paper in Process

To achieve Service profit objectives through building and developing improved performance in distribution branches.

Relationships

The position reports to the General Manager, VP of Operations or equivalent with strong supporting relationships
to Distribution Branch Service Managers, Distribution Branch Managers, Service administration staff and functional
departments.

Occupational Health, Safety and Environment	
Ensure adherence to all relevant OHS&E policies and procedures as appropriate to "Responsible Officer" requirements.	Understanding of requirements.
Ensure employees and safety representatives are consulted on any proposals or changes to the workplace, work practices, policies or procedures that may affect the health and safety of employees.	Evidence of Consultation.
Ensure all visitors are inducted to the Branch Site	All visitors Inducted.
Ensure employees have adequate knowledge and skills to carry out their duties in a safe manner and if necessary provide competent supervision.	Training and development needs have been assessed and corrective action taken when appropriate.
Maintain a safe working environment, systems of work and plant/substances in a safe condition.	Workplace tidiness. Equipment maintained in safe condition.
Ensure all customers are aware of Cummins OHS&E policies and that the workshop is out of bounds.	Compliance to facility induction process.

Performance Management "Ontrack"
Use the Cummins Performance Management System (Ontrack) to set and measure performance and development objectives; and complete quarterly and annual reviews	All OnTrack milestones are met as per the Milestone Matrix requirements

Responsibilities / Duties / Expectations	Measurements & Assessments
Travel to all locations and carry out process audits to identify and correct gaps in the process.	>85% by using QuickServe Web Tool
Ensure that all service admin at the branch has been qualified on the QuickServe process	100% of people at the branches must be qualified on QuickServe
Ensure senior leaders understand basic elements of the QuickServe process and resource dependencies. Keep Leadership appraised of performance, issues and needs	Communication in place and ongoing
Implement processes and improvements in conjunction with Service Operations Group and Branch management team directed at achieving the following ■ Green on DBU scorecard ■ RTCM, QSCM targets ■ WIP Inventory Goals/AOP forecasting ■ Labour efficiency/utilisation goals ■ Paperwork process efficiency and compliance	■ RECT Goals ■ Work In Process (WIP) ■ Continuous improvement in Service Operations ■ Labour utilization/efficiency goals ■ DBU Scorecard
Monitor key process indicators for each branch on a daily basis to understand process performance, and provide coaching to Service Staff to correct problems and improve performance	■ RECT goals ■ WIP ■ Service KPIs ■ AOP and Financial goals
Provide onsite Tactical Support for Branch Service Teams on day to day operations and management. Provide support daily via Same time / Phone / email as required.	Support in place Branch performance summary and reviews circulated at completion of visits.
Drive continuous improvement by identifying projects in the areas of service operation efficiency, process adherence, customer loyalty, safety, lean, etc.	Identify at least one project at a distributor level
Monitor Customer Feedback from each branch to understand how process skills and behaviours impact customer satisfaction and work with branch management staff to improve.	NPS, RTCM and QSCM Results/Surveys Branch improvement strategies developed in conjunction with Branch Management

Responsibilities / Duties / Expectations	Measurements & Assessments
Maintain appropriate administrative procedures and ensure all users are using approved documents, forms and/or business system.	Training and familiarization
Bridge communication with Cummins Corporate and assist to disseminate any information related to the process.	All branches are aware of the details of each piece of communication.
Liaise with other Departments/BU's regarding support for service operations.	Actions items completed in timely manner.
Be a leader in embracing Cummins Vision/Mission while exemplifying the Cummins, performance ethic and core values.	Stakeholder feedback. OnTrack assessment.
Be an active member of the Service Operations Management team.	Contribute to and attend appropriate meetings.
Ensure awareness of, and act in accordance with, Corporate objectives initiatives, policies, and procedures.	Assessment.
Take reasonable care to protect own health and safety and that of others, and to ensure that self and others use personal protective equipment. Report all hazards.	Assessment.
Any other duties/responsibilities that from time to time may be required.	Assessment.
Communication: ■ Maintain open line of communication with fellow employees, supervisors, managers and all other branch employees. ■ Attend & participate in branch onsite meetings as required. ■ Treat all employees, customers, suppliers and vendors with a high degree of dignity and respect. ■ Maintain a professional level of communication, avoiding at all times, the use of profanities.	■ Assessed ■ Meeting minutes ■ Assessed and stakeholder feedback. ■ Assessed and stakeholder feedback.
Reporting Requirements: ■ Load KPIs into QuickServe Web Audit Tool ■ Understand logic behind the DBU Scorecard ■ Monitor branch performance	Assessed Review & assessment

Responsibilities / Duties / Expectations	Measurements & Assessments
Core Values: ■ Be aware of, and act in accordance with corporate ten ethical principles, initiatives, policies and procedures. ■ Be aware of, and act in accordance with, the "Treatment of Others in the Workplace" policy. ■ Any other duties required to ensure the success of the Branch. ■ Adaptable attitude and flexibility within the work environment.	■ Assessed to Cummins Code of Conduct and Treatment of Others in the Workplace policy and stakeholder feedback. ■ Assessed to Cummins Code of Conduct and Treatment of Others in the Workplace policy and stakeholder feedback. ■ Stakeholder feedback and assessed working in a team environment. ■ Stakeholder feedback and assessed working in a team environment.

Summary

Each employee is required to maintain a professional, caring and team based approach at all times. The Customer will see the Company image reflected by the employee as its ambassador. As such the employee will never denigrate the Cummins product or business in any way, and are to always put the customer first.

Empowerment

In accordance with the following Cummins direct and indirect purchasing procedures and specified authorization levels;

■ Direct materials purchasing procedure

■ Indirect purchasing procedure

■ Financial authorization limits and authority to approve and execute agreements policy

Qualifications / Skills / Experience

Essential	Desirable
Detailed knowledge of QuickServe Service Process	Workplace training certificate
Service Business experience	
Branch Service operations experience	
Ability to present and train Service Staff	
Advanced Communication Skills — Written & Oral	
Ability to coach & motivate, dedicated to helping team members succeed	
Ability to develop and manage performance metrics	
Ability to Lead Teams	
PC Literacy Lotus Notes and MS Office Word, Excel & PowerPoint experience	

Essential	Desirable
Confident in communicating with senior Leaders, and to make and implement decisions when there may be no team consensus.	
Understanding of financial concepts (P & L) for teams	
Current driver's license.	

Source of Instructions

- Cummins Code of Business Conduct

- Treatment of each other at work policy.

- General instructions relating to Company Policies and Objectives on Cummins Intranet

- Quality Assurance Procedures and Works Instructions.

- QuickServe Playbook

- Cummins Inc. Warranty Policy Procedures and Instructions.

Manager Signature: _____   Date: _____

Employee Signature: _____   Date: _____

QuickServe KPI Terms and Definitions

	Metric	Definition	Formula	Optimal Range
Productivity & Efficiency	T/B Ratio	Service KPI at the highest level. T/B Ratio is used to gauge service business performance and drives further investigation into other KPIs. T/B Ratio measures the relationship between total technician labor hours that were purchased by the distributor against those technician labor hours billed.	$\dfrac{\text{Total Hours}}{\text{Billed Hours}}$	1.2 – 1.5
	Billing Efficiency	Measures the percentage of technician labor hours that were billed against those technician labor hours that were applied on billable jobs (including retail and warranty).	$\dfrac{\text{Billed Hours}}{\text{Applied Hours}}$	> 90%
	Productivity	Measures the distributor's ability to get technicians onto billable jobs and their ability to convert technician available labor hours into billed hours.	$\dfrac{\text{Billed Hours}}{\text{Available Hours}}$	> 80%
	Labor Utilization	Reflects the degree to which a service location keeps technician available labor hours applied on billable jobs (including retail and warranty) versus lost time or non-revenue generating work.	$\dfrac{\text{Applied Hours}}{\text{Available Hours}}$	> 85%
Profitability	Work-in-Progress (WIP)	Displays the cost value of all open work orders for a given time period.	Labor COS + Parts COS + Misc COS	Ensure WIP is minimized
	WIP by Age	Groups the age of all open work orders by count and cost into the following categories: 1–3 days, 4–10 days, 11–30 days, 31–60 days, 61–90 days, and >90 days.	Current date – First cost applied date	
	WIP DSO (Days Sales Outstanding)	Calculates the current cost value of all open work orders divided by the average per day service cost of sales from the previous full year.	$\dfrac{\text{WIP (\$)}}{\text{(Last full year service cost of sales} \div \text{365 days)}}$	
Customer Support Excellence	Service NPS	Standard process used to measure, understand and improve customer loyalty. NPS is based on the customers answer to one question: *"How likely are you to recommend Cummins to a business associate or colleague?"*	% of Promoters – % of Detractors	> 60%
	QuickServe Customer Meter	Measures the customers' perception of the QuickServe process throughout the entire repair event. In other words, is the customer feeling the QuickServe process?	$\dfrac{\text{Total \# of Yes}}{\text{(Total \# of Responses –}\ \text{Total \# of N/As)}}$	> 90%
	Repair Timeliness Customer Measure (RTCM)	Metric that measures whether or not the time to repair met the customers' expectations.	$\dfrac{\text{Total \# of Yes}}{\text{(Total \# of Responses –}\ \text{Total \# of N/As)}}$	> 90%
Responsiveness	RECT InSpec Performance	Measures the cycle time of the repair. RECT InSpec identifies those repairs that were completed and invoiced within time specifications. RECT begins when the piece of equipment was made available to the Service department to be worked on and ends when the work order has been invoiced or a Cummins Warranty Claim gets filed.	$\dfrac{\text{\# of WOs InSpec}}{\text{Total \# of WOs}}$	**N.A. InSpec:** Major repairs completed < 3 days; Minor repairs completed < 1 day. **Int'l InSpec:** All repairs completed < 3 days.
	Paper-in-Process (PIP)	Measures the amount of time (in hours) it takes to invoice our customers.	(Invoice date + time) – (Last labor date + time)	**InShop repairs:** < 12 hours **Mobile repairs:** < 24 hours

QuickServe Service Terms

Total Hours   All hours purchased from a defined population of technicians, for a given time period. These hours include: technician regular work hours, overtime hours and paid leave (annual, vacation, sick, etc.).

Available Hours   Hours paid to technicians less paid holidays, paid leave (annual, vacation, sick, etc.) and paid days absent. These are the hours a technician was at work and available to be assigned to a job.

Applied Hours   Hours in which technicians worked on billable jobs (including customer billable; internally billed jobs from service to another dept.; preventative maintenance; and upfit / re-manufacturing) regardless of the number of hours which are billed.

- *Labor Utilization:* Applied hours used in LU metric should include both invoiced and open jobs
- *Billing Efficiency:* Applied hours used in BE metric should include invoiced jobs only

Billed Hours   All hours billed to customers during a defined time period. Includes hours invoiced to external customers, internal customers, factory warranty and factory policy.

COS   A common financial acronym referring to cost of sales.

Total Time to Repair (TTR)   Measures the time it took for technicians to complete a repair. Begins at first cost applied and ends at last labor.

Absorption Rate   Measures the distributor's ability of Parts and Service Margins to support the full distributors business in a situation where there are no unit (whole good) sales.

$$\frac{\text{Aftermarket Gross Margin (\$)}}{\text{Operating Expense (\$)}}$$

Definition of NPS Terms

NPS is the standard process used at Cummins to measure, understand and improve *customer loyalty.* The measurement is is based on the customers' response to one simple question: *"How likely are you to recommend Cummins to a business associate or colleague?"* Customers respond on a 0–10 scale where 0 is "Not at all likely" and 10 is "Extremely Likely." Based on their answer, customers are divided into three categories:

Promoter   Customers who score Cummins as 9 or 10.

Passive   Customers who score Cummins as 7 or 8.

Detractor   Customers who score Cummins between 0–6.

QuickServe Customer Meter Questions

1. Did we start the repair when requested?

   If yes, move to question #2.
   If no, did we start the repair when scheduled?

2. Did we provide an estimate for the repair?

   If yes, was the invoice equal or less than the estimate?
   If no, move to question #3.

3. Did we complete the repair when promised?

4. Did we provide status updates during the repair?
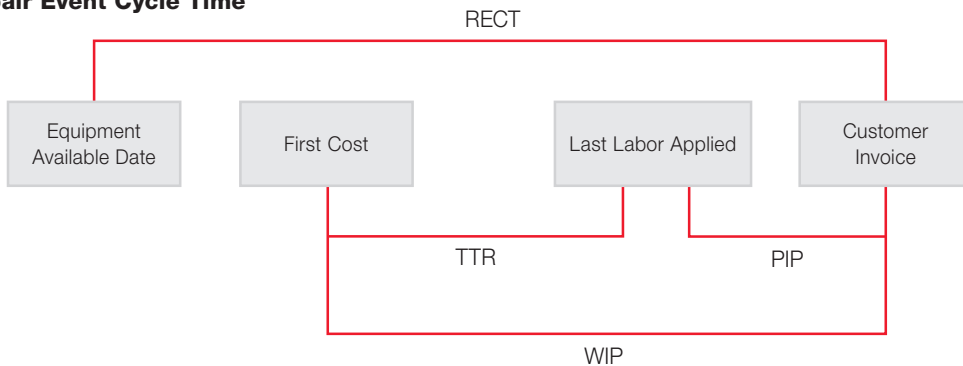
Repair Timeliness Customer Measure (RTCM)

1. Given the nature of the repair, did the time it take to complete the repair meet your expectations?

QuickServe Process

Mobile Only

Repair Event Cycle Time

QuickServe Playbook

Report Builder Cheat Sheet

>> QuickServe Customer Meter Instructions

Log into the Allegiance system.

Select the **Surveys** tab at the top.

Select the **Transactional Survey** link.

On this page complete the **Time Period** for the current year, so as to obtain Year To Date information.

Then click the **Show Filters** at the right side of the screen.

Add the **ABO/RDO** filter, select your region.

Click the **"+"** button on the right to add another filter.

Add the **Service or Parts** filter, select Parts.

Select the yellow **Apply** button.

Once the page has updated with your region information, scroll to the bottom of the page.

Select **QuickServe Customer Meter Questions**, this will expand the section.

Use the information on the Total line.

Total Yes divided by (Total Respondents minus Total No) = QuickServe Customer Meter %

>> Finding Gaps in the QuickServe Customer Meter, by Distributor

Log into the Allegiance system.

Select the **Surveys** tab at the top.

Select the **Transactional Survey** link.

On this page complete the **Time Period** for the current year, so as to obtain Year To Date information.

Then click the **Show Filters** at the right side of the screen.

Add the **Distributor Name** filter, select key distributor name you want to analyze.

Click the **"+"** button on the right to add another filter.

Add the **Service or Parts** filter, select Parts.

Select the yellow **Apply** button.

Once the page has updated with your region information, scroll to the **Branch Name** entry. Click Branch Name.

With this section expanded, there is a row of icons under Branch Name. Click the last icon, which is **Cross Tab**.

This opens a selection box. Select the following boxes:

■ Started Repair When Requested

- Estimate Provided

- Invoice Equal or Less than Estimate

- Completed Repair When Promised

- Provided Status Updates During Repair

Select OK.

This shows the whole distributor numbers in the Total Responses line.

Individual question scores are determined by the Total Yes / (Total Yes + Total No). Use this method to determine which question(s) are opportunities for improvement.

This query also shows the individual branch details, and the same method can be used.

The chart obtained in this query can be exported to Excel for further analysis, by using the **Export** function at the right of the section.

>> Audit Comparison Report Instructions

Log into the QuickServe Process Tool.

Click on the **Reports** tab.

Select **Audit Comparison Report** from the drop down list.

Click **Launch My Report**. This opens a new browser window with parameters to be completed.

Select your **Region**.

Select the **Distributor(s)** you wish to review (you may select All or individual Distributors).

Select the **Branches** you wish to review (you may select All or individual Branches).

Select the **Start Date** and **End Date** of the audits you wish to review.

Click the **View Report** button at the right.

The report can be viewed in the browser or exported to Excel.

>> Average Audit Score Report Instructions

Log into the QuickServe Process Tool.

Click on the **Reports** tab.

Select **Average Audit Score Report** from the drop down list.

Click **Launch My Report**.

Select your **Region** and **Year**.

Click the **View Report** button at the right.

The report can be viewed in the browser or exported to Excel.

>> KPI Dashboard Report Instructions

Log into the QuickServe Process Tool.

Click on the **Reports** tab.

Select **KPI Dashboard Report** from the drop down list.

Click **Launch My Report**.

Complete the parameters for the data you wish to review.

You may select All for **Distributors** and **Branches** to view data for your entire region.

>> Accessing Custom Reports Instructions

Log into the QuickServe Process Tool.

Click on the **Reports** tab.

Select **Launch Custom Reports** from the drop down list.

Click **Launch My Report**.

This again opens a new browser window.

Click **Home** at the top left of the page (in blue letters).

Click **Custom Reports** folder.

Select which folder you want to view reports from, either **Audit Reports** or **KPI Reports**.

Select the report you wish to review.

Complete the parameters as needed (each report is different.

Click the **View Report** button at the right.

All reports can be viewed in the browser or exported to Excel.