

Fergus Go Deep Dive

Interviews

Interviews conducted with AU/NZ customers during
Aug/Sep 2021



CONFIDENTIAL

Purpose

- ⊕ Shared understanding of Fergus Go work
- ⊕ Insights from last research sessions
- ⊕ What's next for mobile

Research Objectives

- ⊕ Understand tradie's on-site journey, needs, frustrations and delights.
- ⊕ Opportunities to improve Fergus mobile touch points during a site visit.
- ⊕ Difference of needs between AU/NZ customers.

Approach

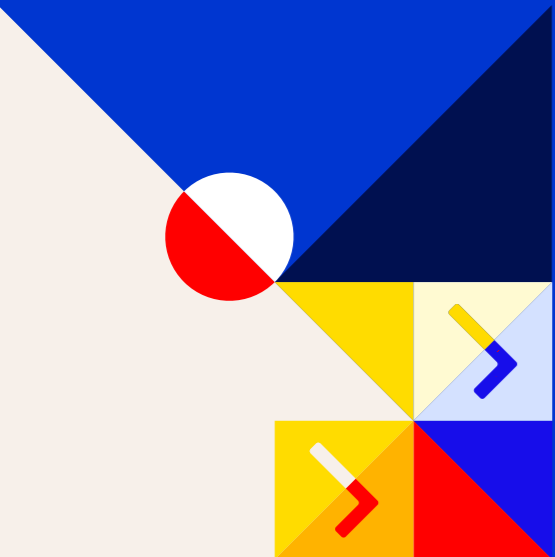
- ⊕ 9 interviews (5 NZ + 4 AU)
- ⊕ Criteria
 - Business owners - still on the tools
 - Paying Fergus customers
 - Use Fergus mobile at least 3 times a week
 - Small businesses (2 - 7)

Summary

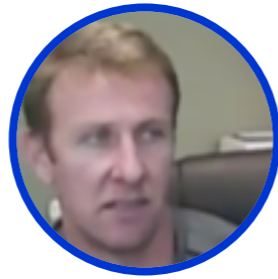
- ⊕ On-site user needs are aligned with Fergus Go GTM plan.
- ⊕ Late entry of time & materials is frustrating for most users.
- ⊕ Most of the users see the need of creating job on site.
- ⊕ Next steps would be to dig into
 - Capturing materials on-site
 - Improving time capture
 - On-site job creation

PARTICIPANTS

5 NZ + 4 AU



NZ Participants



INDUSTRY

Plumbing & Gas fitting

Electrical

Electrical

Plumbing & Gas Fitting

Electrical

STAFF

8

8

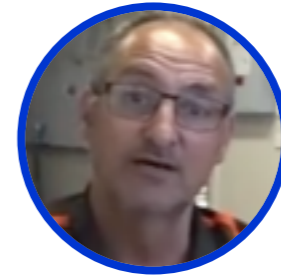
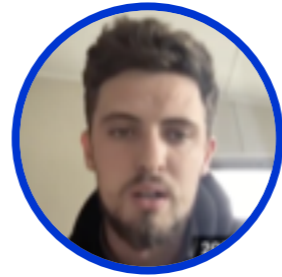
7

5

1

*** Intercom data was not accurate hence ended up with participants outside 2-7 employees segment.*

AU Participants



INDUSTRY

Electrical

Electrical

Air Con

Electrical

STAFF

3

1

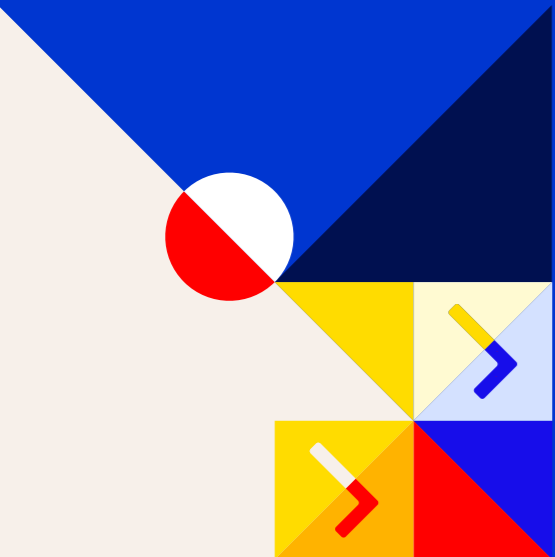
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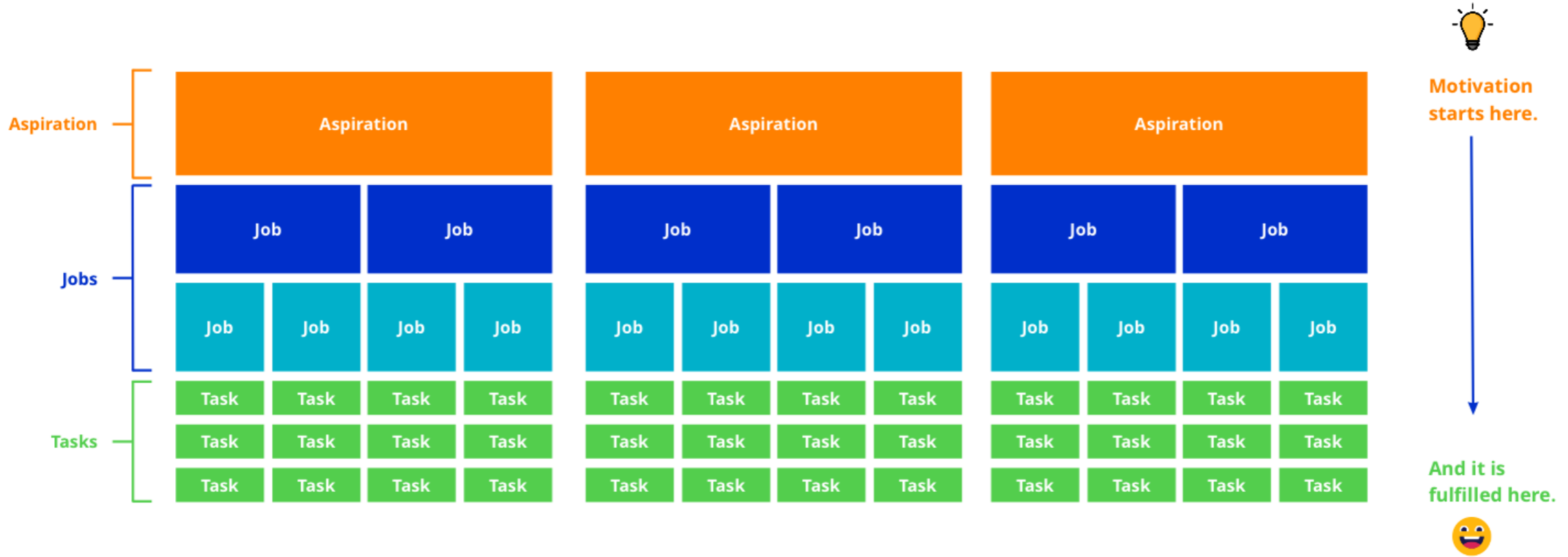
*** Intercom data was not accurate hence ended up with participants outside 2-7 employees segment.*

JOBS TO BE DONE

Sneak Peek



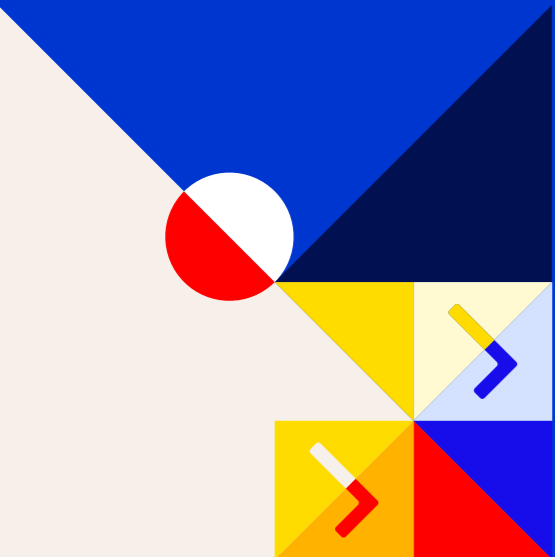
Mapping Motivations to Tasks



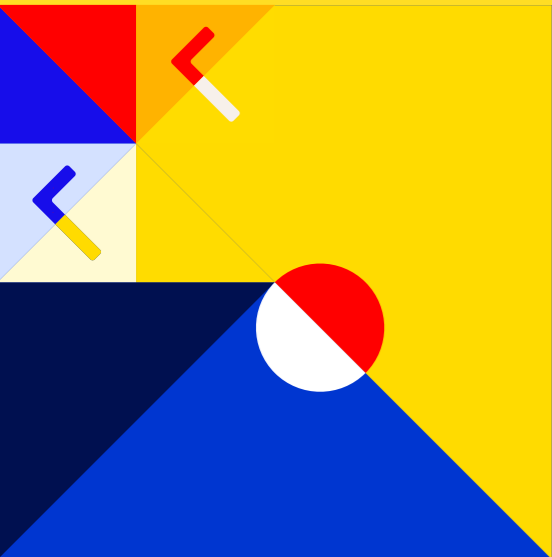
The 3 Pillars of Progress



MAJOR INSIGHTS



TIMESHEETS



Timesheets

5/9 participants talked about continuous effort of reminding the boys (through text/calls) to do their timesheets.

Mixed behaviour in logging times, few log on-site others at the end of the day/week.

1 mentioned that the mobile UI is too complex for the boys to use on-site.

JTBD Alignment



When I'm **doing work** for a customer

I want to easily **understand all associated costs** I've incurred
So that I can **stay in control of the job costs**

Quotes

It is pretty much a daily battle doing their (the guys) timesheets.

Dean Skipsey

The time keeping is not accurate because they're doing it 8'o clock at night, or even the following Wednesday; a week later.

Dale Healy

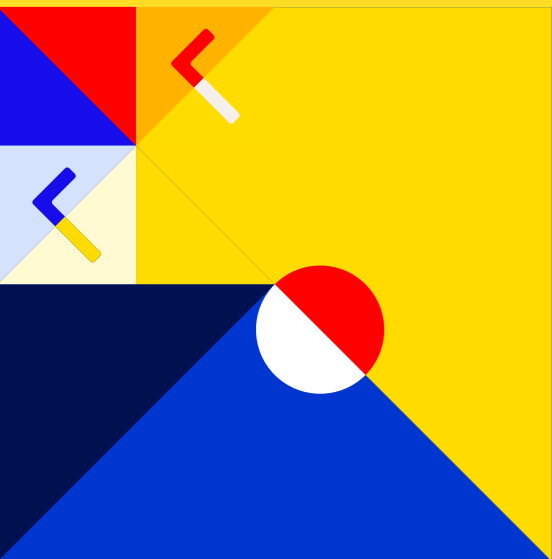
...if you've got 3 or 4 jobs booked in for a day ... quite often, you sort of rush to the next job and get that done with the intention of doing it all (timesheets & materials) at the end of the day ...

Craig Stewart

How Might We

HMW reduce business owner's
frustration over late and
inacurate time entries?

MATERIALS



Capturing Materials

All the owners who struggle with the timesheets also struggles with capturing the materials used on site.

7/9 participants use Stock on Hand to record materials. 3 of them faced problem using Stock on Hand mainly around prices and complexity of use.

Boys dont always remember the product code while entring the Stock on Hand, hence the owners had to track the boys and correct the items.

JTBD Alignment



When I'm **doing work** for a customer

I want to easily **understand all associated costs** I've incurred
So that I can **stay in control of the job costs**

Quotes

Its like am playing detective on the jobs when it comes to invoicing...constantly wondering why, constantly questioning.

Dale Healy

At the end of the job, I will either... add in what I have used in my time entry, or add into the SoH. The main reason I am not sort of keen on using SoH is that the pricing that comes up is not always accurate & once it goes through to invoicing you can't adjust the pricing.

Craig Stewart

yeah and it's one of the issues we have. These things (materials) can quite easily get missed so that's why i'm pushing to get it done on a daily basis.

Craig Stewart

And it's like oh I don't know which one (item) it was. while adding materials later.

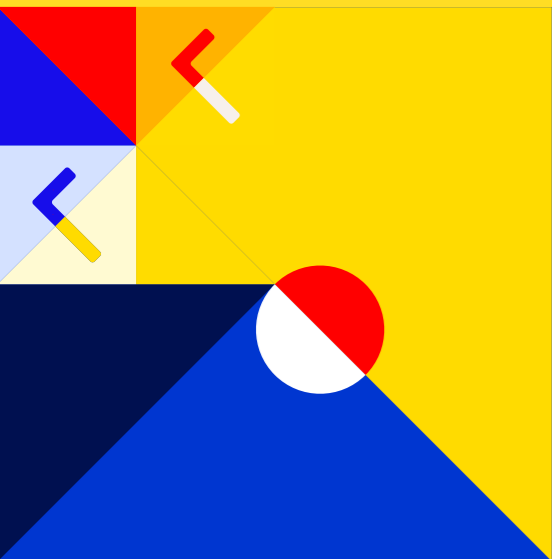
Jono Preston

How Might We

HMW enable on-site tradies accurately capture all the materials used on-site?

HMW enable tradies accurately capture the cost of all the materials used on-site?

CREATE JOBS ON SITE



Create Job on Site

6/9 participants see the need of capturing new job details on site.

4 participants use mobile to create job on-site.

1 participant uses iPad on sites to create quote.

1 faced problems using mobile hence he started using desktop.

JTBD Alignment



When I **get a work request**
I want to **consult with my customer** about their needs and the constraints
So that I can promptly **provide advice, transparency, and win the job**

Quotes

I went to do a quote today and realised I hadn't created a job; so I was there creating the job, so I can take notes and take a photos. So yeah I regularly create jobs (on site - on mobile).

Richie

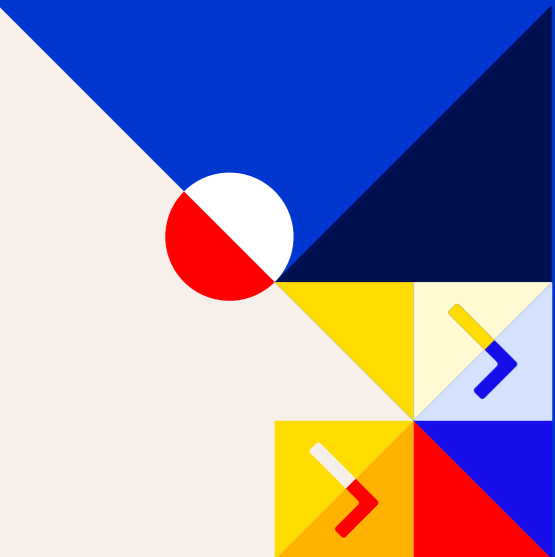
It'd be awesome if I could start doing quotes while on site ... just to save time and capture as much before you leave site... you're taking photos and notes that would be great if you could almost start building it (quote) at that time ... the mobile app is probably not the right place to be doing that but the tablets probably is a better tool.

Dean Skipsey

How Might We

HMW enable tradies working on-site, capture all necessary job details needed to start and price a new job?

MOBILE USAGE



Fergus Mobile Usage - NZ



Timesheets
Job details
Clients details
Photos



Create jobs
Job details
Timesheets
Stock on Hand
Photos
Notes
Checklists



Job details
Photos
Notifications
Timesheet
Stock on Hand



Job details
Timesheets
Photos
Notes
Checklists
Stock on Hand



Create job
Job details
Timesheets

** Items in **red** are not planned for Fergus Go 1st release.

Fergus Mobile Usage - AU



Job details
Photos
Files
Checklists
Tasks



Job details
Schedule
Timesheet
Photos
Stock on Hand
Notes
Noticeboard



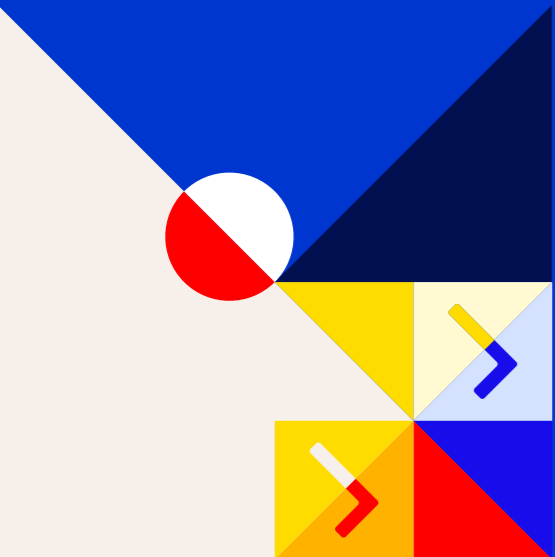
Job details
Timesheets
Checklists
Forms
Create Job
Notes
Stock on Hand
Files
Photos
H&S
Search



Job details
Timesheet
Schedule
Search
Stock on Hand
Create Job
Photos
Files

** Items in **red** are not planned for Fergus Go 1st release.

MORE THEMES



Files

- 4/4 AU customers use Files on mobile (view only).

The type of files they upload to a job varies from service procedures, H&S,

- floor plans, diagrams etc. Need further discovery whether it is related to compliance?

JTBD Alignment

Be efficient with my time

Do the work

Operate with excellence

Know what to do

When I have **work to do**
I want to **have all relevant information**
So that I can **do my work efficiently**

Fergus Learning Curve

- Steep learning curve.
- Not even sure if they are using it correctly.
- Lack of time for learning

There is an opportunity to train customers to take full advantage of Fergus as most of them understand, they don't use Fergus to its full potential.

Quotes

Honestly, I probably don't use Fergus as much as I should in regards to its capabilities... it's great and it's improved my revenue hugely ... but like I haven't probably put the time in to figuring it out for myself... I almost need someone to sort of probably teach me how to use it.

Glen Martin

At the moment, we're probably not getting the full benefit out of what we need, just because it's really hard to get the other guys to use software that is not quite there yet.

Isaac Smith

I would love to be able to use Fergus, we are now keeping information about jobs on google platform; because we don't know where the jobs (are) at in Fergus

Shane Gatt

you have to play by Fergus's rules, if you don't ... there's no point of having it. It took me ages to learn them but yeah you got to play ball, or if you don't, you're wasting your time with it.

Stephen Hopkins

Admin Time

- Most of the participants complaint about the admin work

JTBD Alignment



I want to **minimise the admin burden** so I can spend more time doing the **things I like to do**.

Quotes

If I've not actually got my tool belt on and doing the work, I don't feel like I'm working....I know that the paperwork and the invoicing ... is an element of my business. I just think that's a burden that I have to bear because i'm self employed, if I had 10 guys working for me, then that would become my job.

Glen Martin

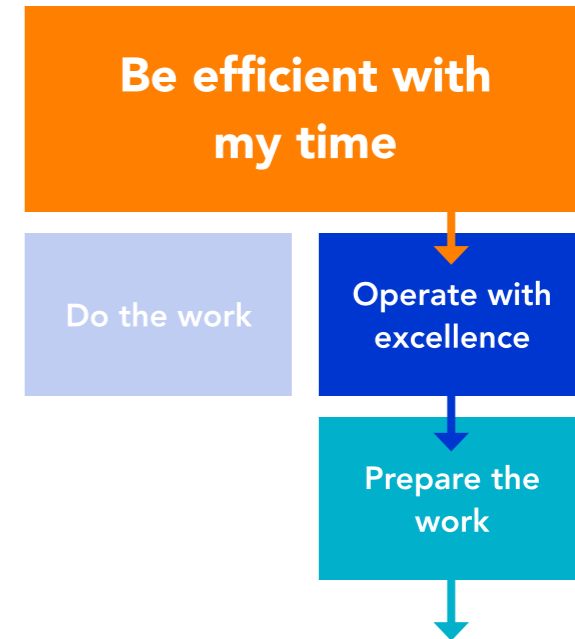
Yes, there's quite a lot what I am doing at the moment, I do need help in the office...to appoint and find the office manager to take over as much as what i'm doing now is impossible

Dale Healy

Job Schedule

- 8/9 participants schedule the jobs before they go on site.
- 5 struggled with scheduling small service jobs because the schedule keeps changing.
- 2 wanted to have calendar on the mobile to see the schedule of the boys on the go.
- 1 said that Fergus calendar on desktop is not intuitive hence he used Google Calendar.

JTBD Alignment



When I'm **doing work** for a customer
I want to easily **understand all associated costs** I've incurred
So that I can **stay in control of the job costs**

Quotes

..it's a continual work in progress before that 1 (small job) is in the schedule.

Dean Skipsey

...everything has to be scheduled ... you have to play by Fergus's rules, if you don't ... there's no point of having it. It took me ages to learn them but yeah you got to play ball, or if you don't, you're wasting your time with it.

Nick Paris

It would be nice to have a calendar, so we could ever see all of the guys on the app, I know editing that would be a nightmare, but at least just being able to bring it up and go, Josh is here, Dan is here.

Dean Skipsey

Location Tracking

- Most participants did not see the need to tracking boys location.
- 2 participants were concerned about privacy using location tracking.
 - 1 said that it is a breach of privacy; you should provide company phones to the boys if you want to track their location.

Quotes

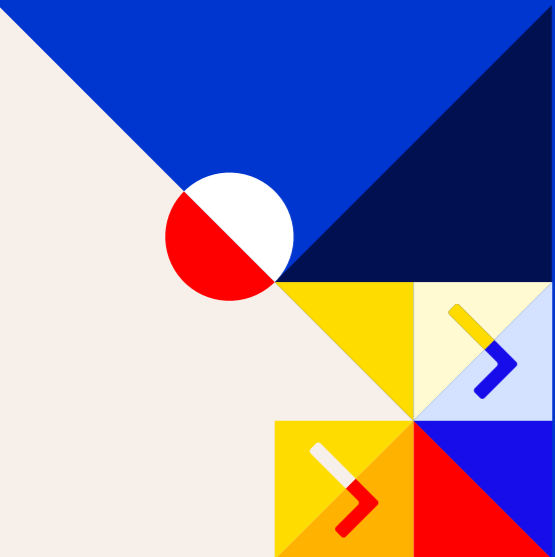
I don't need it. If I have a team of 12-20 guys then, that would be helpful but with the team of 6 I know exactly where they are.

Nick Paris

You cannot ask someone (your employee) to GPS their own phone for you ... that's a privacy issue... but if you give someone your phone (company phone), then that's different... Your employees gotta have rocks in their head if they're going to GPS themselves for you. I wouldn't do it. No, you give me a phone and then I'll GPS it, yeah. No you're not tracking my time huh.

Stephen Hopkins

NEXT STEPS

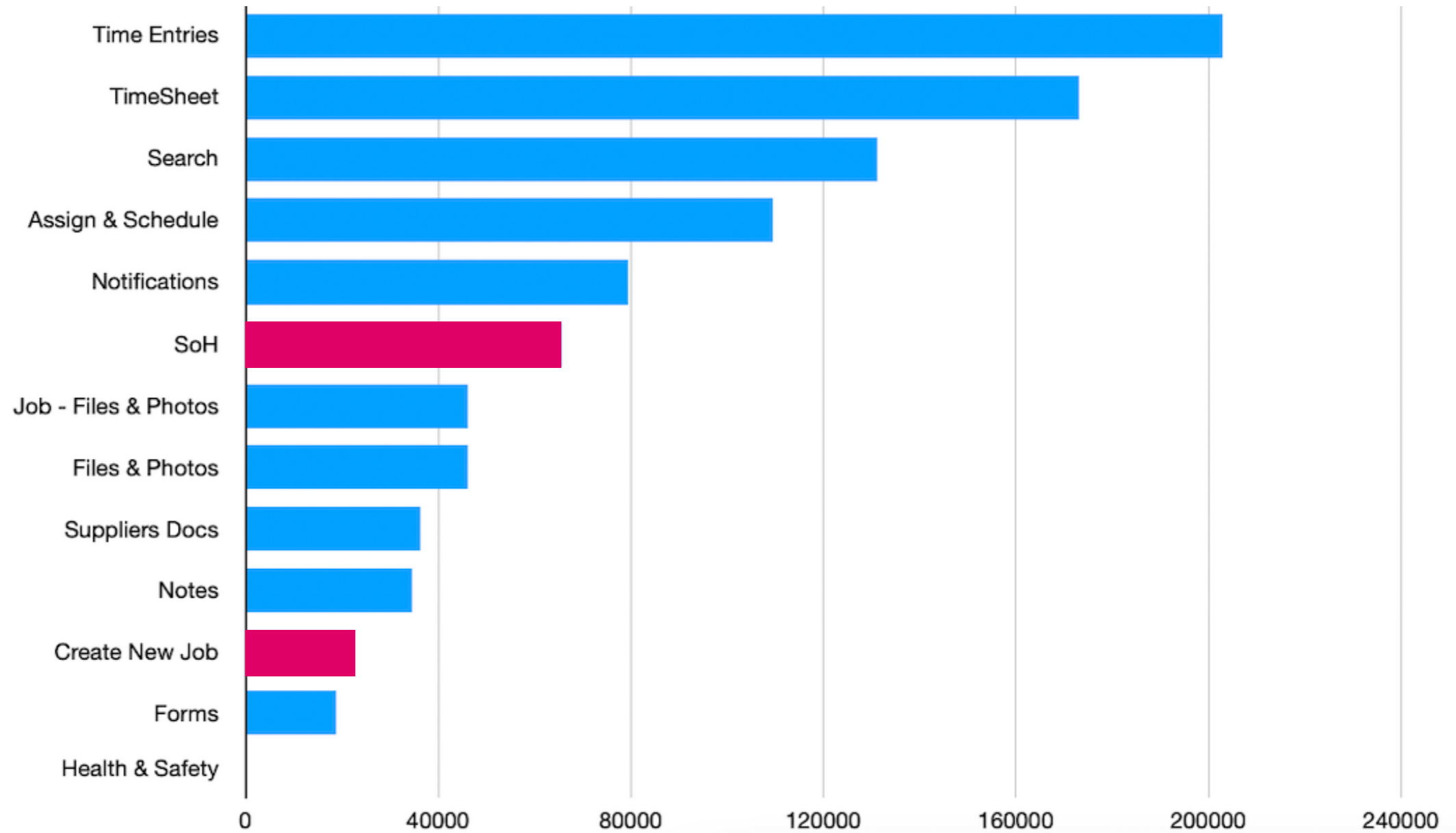


Recommendations

- ⊕ Capture materials on-site
- ⊕ Improve time capture
- ⊕ On-site job creation



Mobile usage for the month of May 2021.



How Might We

Timesheets

HMW reduce owner's frustration over late and inaccurate time entries?

Materials

HMW enable on-site users accurately capture all the materials used on site?

HMW enable trades accurately capture the cost of all the materials used on-site?

New job

HMW enable trades working on-site, capture all necessary job details needed to start and price a new job?

Related documents

NZ interviews summary

- <https://www.notion.so/fergussoftware/Mobile-journey-map-validation-July-2021-New-Zealand-e6b32c2f28824c679b7f172094e68db3>

AU interviews summary

- <https://www.notion.so/fergussoftware/Mobile-journey-map-validation-Sep-2021-Australia-57d77515b7264a9795618ea77fbd4a3d>

