

The logo for 'tugger' is displayed in a white, lowercase, sans-serif font within a dark blue, curved banner. To the right of the text, there are stylized circuit-like graphics in light blue and white, including lines, dots, and a large arrow pointing right.

**tugger**

# Smarter Reporting for Simpro<sup>®</sup> Users

**Webinar**

Craig Morrall, Co-founder of Tugger<sup>®</sup>  
Hosted in partnership with Simpro

# Relatable field service scenarios

- Spending hours working out which jobs actually made money last month
- Exporting data to spreadsheets to figure out sales pipelines
- Not knowing your true technician utilisation until it's too late
- Your office manager manually building reports every Monday morning



# AI has moved on

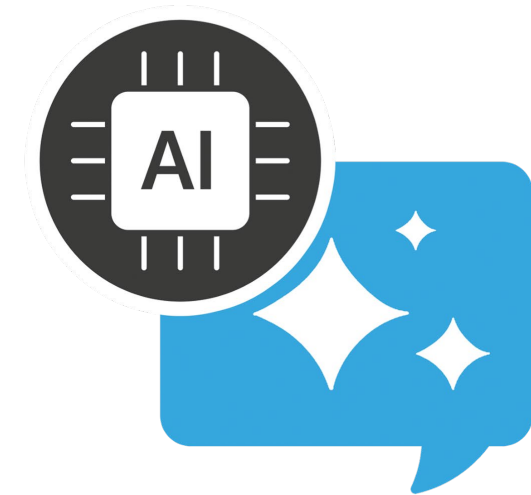
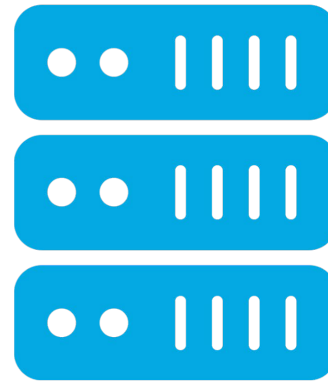
## What most people think AI does

- Write emails
- Marketing copy
- Code
- Summarise documents

## What AI can do now

- Connect to your business data
- Answer operational questions
- Analyse trends
- Compare performance across your whole business

# Your Simpro data, ready for anything



# Three steps



## You ask

Type a question in  
Claude or ChatGPT

## Tugger connects

The AI reaches into your  
Tugger warehouse

## You get an answer

Plain English, with  
the data you need

No DAX. No SQL. No dashboard building. Just ask.



AI Insights Demo / Greeting ▾



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Hey there!

Thought process >

Hey! How can I help you today? 😊



Show me job profitability for the last quarter, broken down by business group



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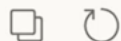
whether that's a one-off pricing issue or a pattern.

**Projects** is the star performer this quarter — the highest margin at 67.8% and solid revenue at £129k. Good mix of well-priced work coming through.

**Small Works** has the healthiest profit contribution relative to its size, with £107.9k gross profit on £169.1k revenue (63.8%). Efficient and consistent.

**Facilities Management** is the smallest group by revenue (£74.7k) with a respectable 60.1% margin, though one or two jobs ran at a loss and dragged the blended figure down slightly.

Would you like me to drill into any specific group — for example, identifying the individual jobs pulling margins down in S&M, or comparing this quarter against the previous one?



Reply...



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profit with a 95.8% margin, driven primarily by two large jobs. System installations (Projects) follows at £41k and a very healthy 90.9%.

**High volume, low margin** — Equipment Upgrades generated £26.5k GP but on £82k of revenue — just 32.3%. A handful of jobs in that cost centre are clearly under-priced or over-running. Similarly, System Upgrades (Projects) is pulling in £55k revenue but only converting 36.3% to gross profit.

**The outlier** — Emergency Call-Out effectively broke even on £84k of revenue (-0.1% margin). That's almost entirely one large job where costs massively overran the call-out charge. Worth reviewing whether that job had the right rate card applied.

**Best margin efficiency** — Commissioning & Testing (99.3%), Infrastructure Works (100%), and Compliance Improvements (95.8%) are all converting almost all revenue to gross profit — very little direct cost attached, likely labour-light or well-priced work.

Want me to drill into any specific cost centre or flag the individual jobs dragging margins down?

For the cost centres with the lowest gross profit margin, show me the 5 worst performing jobs and what drove the overruns



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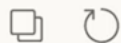
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**The Emergency Call-Out cost centre (Job #52683) is the most structurally concerning** — a £83k job that essentially broke even because materials were procured at £18k over budget with no mechanism to recover that cost from the client. Emergency call-out work likely needs either a higher rate card, a materials contingency clause, or a rapid re-quote trigger when spend exceeds a threshold.

Would you like me to look at anything else — for example, which project managers or technicians are associated with the overrunning jobs?



What's our quote-to-job conversion rate for the last 3 months, broken down by month?



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Break that down by salesperson. Who's converting the most quotes?



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The Claude logo, a stylized 'C' inside a circle.



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Hey there!

Thought process >

Hey! How can I help you today? 😊



Show me the technician utilisation for the next four weeks for each engineer



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For the engineer with the lowest utilisation what jobs are they scheduled for and what sites are they visiting in the same period?

Identified lowest-utilization engineer and planned data retrieval strategy >

Looking at the previous data, there are a few engineers tied at just one 4-hour slot in the period — I'll pull up the details now.

Query >



Reply...



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More interestingly, the job is already marked as **Invoiced** with a completed date of **23 March** — the day before the scheduled visit. That's a potential data quality issue — either the schedule was logged after the job was marked complete, or the completion date was entered prematurely. Either way, it may be worth checking with the engineer or their supervisor.

Beyond that single slot, they have **no bookings at all** for weeks 2-4, suggesting either they're on leave, or there's a gap in planning that needs filling. Would you like to look at the other low-utilisation engineers too?



Who are our top 10 customers by total invoiced amount in the last 12 months, and how many jobs did we complete for each one?



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Hey there!

Thinking about responding to a casual greeting >

Hey! How's it going? What can I help you with today?



Which cost centres have the highest average cost overrun as a percentage and how has that trended over the last 6 months?



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# Three takeaways

1

Your Simpro data is full of answers. You just need a simpler way to get at them.

2

AI tools like Claude can't talk to your business data on their own. AI Insights is the layer we've built to make that connection.

3

AI Insights is live. No Power BI skills, no SQL, no exports. Just ask a question.

# Your Questions



Find me on LinkedIn:

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