CASE STUDY

Getting AI-Ready with Solid *Data Foundations.*

How Smarter Services went from fragmented reporting to real-time operational visibility.

Smarter Services | Facilities Management | PE-backed | 300+ sites

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SHIPSHAPE DATA

AT A GLANCE

Company	Smarter Services
Industry	Integrated Facilities Management
Size	300+ sites across estate, student, build-to-rent, and healthcare
Backed by	Key Capital Partners (private equity)
Featured Leadership	Jason Southwell (CEO) & Chris Pullinger (Financial Controller)
Timeline	14 weeks from kick-off to live dashboard

HEADLINE RESULTS

7 disconnected systems unified	**14** weeks from project start to live	**1.5** days freed up per week	**99.7%** reduction in risk identification time

BEFORE AND AFTER

	Before Shipshape	After Shipshape
Reporting	Weekly PowerPoint compiled manually from 7 systems	Real-time dashboard updated daily
Data lag	Information 1-2 weeks out of date	Previous-days data visible on demand
Risk detection	Missed-visit reporting was retrospective, limiting speed of intervention	Breaches surfaced and actioned same day
Compliance	Right-to-work tracked via manual spreadsheets across siloed HR systems	Live compliance dashboard with 30-day expiry alerts
Board reporting	Board reporting relied on manual consolidation from multiple sources	Clean, governed data set reported on at board level
Team time	1.5 days/week spent on manual data consolidation	Team redeployed to value-adding work

BACKGROUND

Smarter Services is a facilities management company founded in 2006 and headquartered in Walton-on-Thames. What started as a commercial cleaning operation has grown into an integrated FM provider working across estate, student accommodation, build-to-rent, and healthcare sectors, looking after over 300 sites and holding one of the strongest client retention rates in the industry.

The business expanded through organic growth and acquisition, picking up 'Low Cost Cleaning' in April 2023 to move into the regulated medical sector and CQC compliance territory.

Private equity firm Key Capital Partners made a significant minority investment to fund growth capital, further acquisitions, and continued investment in people and systems. The management team, led by CEO Jason Southwell, wanted to professionalise operations, build proper reporting, and prepare the business for its next growth phase. Chris Pullinger joined as Financial Controller to help drive that transformation.

The pattern Chris walked into will be familiar to anyone who has worked in a PE-backed, founder-built business. Things had worked fine when the customer base was small and the team could hold everything in their heads. But as Smarter Services scaled to over 300 sites, the need for more integrated reporting became clear.

> *"If you don't have timely and accurate metrics or dashboards, it's like trying to fly and aeroplane without knowing the speed, the fuel, or the direction. Would you want to get on that plane?"*
>
> **Chris Pullinger, Financial Controller, Smarter Services**

THE CHALLENGE

Smarter Services growth had accumulated seven separate operational systems. Property Inspect for site audits, UHUB and Timegate for workforce management, Active for HR, HappyFox for support ticketing, Flexkeeping for housekeeping operations, and RAMS Vehicle Tracking for fleet management. Each one did something useful on its own. None of them talked to each other.

The result was that people became the technology. A team in the operational support team spent roughly a day and a half each week manually logging into those seven systems, pulling data into spreadsheets, consolidating it into a PowerPoint deck, and distributing it across the business. By the time anyone read it, the information was already a week old. Sometimes longer.

> *“It was always a manual, non-automated process. As soon as the button’s pushed, that data’s out of date.”*
>
> **Jason Southwell, CEO, Smarter Services**

That lag had real consequences. Smarter Services operates under SLAs with its clients. Missed visit reporting was retrospective which limited the teams ability to intervene quickly and efficiently. The business was reactive which led to being on the back foot.

For Jason, this was a reputational risk as much as an operational one. Smarter Services had spent twenty years building its name. ‘*In facilities management, you are only as good as your last clean, your last customer contact.*’ Not knowing about a problem until weeks after it happened meant the damage was already done.

The implications went beyond service delivery. Right-to-work (RTW) compliance for every employee is a legal requirement, and breaches carry fines of up to £60,000 and potential criminal prosecution with up to five years’ imprisonment for directors.

Tracking expiring documentation across a large, dispersed workforce using manual processes and siloed HR systems left the business exposed.

> *"We knew what we wanted to achieve, but wanted specialist support to accelerate the journey and bring external expertise."*
>
> **Chris Pullinger, Financial Controller, Smarter Services**

THE JOURNEY AND SOLUTION

It started at a PE investor dinner in late 2025, where a McKinsey speaker presented on AI capabilities. Chris described a split room '*Those convinced AI would supercharge everything, and those who saw it as opening Pandora's box*'. Jason came away wanting to do something concrete with AI.

That led to an AI collaboration group across the investor portfolio, and through a recommendation from another portfolio company, Smarter Services connected with Shipshape Data. The early conversations covered four or five potential use cases, but one thing stood out. Bringing all of the operational data from seven disconnected systems into a single, governed environment would form the basis of anything they wanted to achieve with AI.

Shipshape ran an AI Readiness Assessment, which showed Smarter Services were further ahead than some businesses in the industry, but still had gaps if they wanted to demonstrate leadership in the space. The message was clear - If the data is not right, no amount of AI will produce trustworthy results.

> *"For AI and advanced reporting to work, the underlying data needs to be consistent, governed and trusted."*
>
> **Chris Pullinger, Financial Controller, Smarter Services**

From first conversation to project kick-off was roughly a month, and the total project ran 14 weeks from start to a live, operational dashboard.

The technical challenge was connecting seven data sources, each with its own quirks. Some had APIs. Some did not. Some vendors charged for API access; others had no API at all. Shipshape's team built scripts and automated pipelines for each source, handling the messy reality that every mid-market business faces when its systems have grown organically over years.

Data from all seven sources lands first in Microsoft Blob Storage, then moves through a medallion architecture (Bronze, Silver, Gold layers) in Snowflake, where it is cleansed, transformed, and governed. Microsoft Power BI sits on top as the analytics and visualisation layer, giving the Smarter Services team the drillable, real-time dashboard they needed.

A decision point arose early around security. The original proposal used an alternative solution for the data warehouse, but given Smarter Services' ISO certifications and plans to pursue ISO 27001, Shipshape recommended switching to Snowflake for its enterprise-grade security credentials. For a PE-backed business thinking about its next funding round, the security posture of your data infrastructure directly affects your valuation.

> *"You took the time to understand our business, understand what people needed, putting yourself in those people's shoes before making any recommendations. We really appreciated that."*
>
> **Chris Pullinger, Financial Controller, Smarter Services**

From a resource perspective, the project was light-touch for the Smarter Services team. The bulk of the work sat with Shipshape. Chris and his colleagues provided system access, answered data queries, and attended weekly checkpoint calls. A dedicated communication channel kept things moving between sessions. When two of the original seven data sources turned out to be redundant, they were swapped for more valued alternatives.

The KPIs on the dashboard evolved as they were reviewed, which is normal when you put data in front of people who have never had it consolidated before. Shipshape worked with the team to refine the final set of metrics rather than locking everything down rigidly at the start.

THE OUTCOME AND RESULTS

Fourteen weeks after kick-off, the Smarter Services exec team can open a laptop and see the critical health checks of the business in real time. No more waiting until Friday to see what happened last week and no PowerPoint decks stitched together from seven systems.

The dashboard delivered value on two fronts immediately. The obvious one was efficiency, eliminating the manual operational hand-cranking that had consumed a day and a half of team time each week. But the bigger win, the one Jason keeps coming back to, is risk visibility. Missed visits that previously went undetected now show up the following morning.

> *"Now we've got a report that shows those breaches. It's prompted a change in process, change in management style, and that's exactly what we need in order to make the next step in our growth journey."*
>
> **Jason Southwell, CEO, Smarter Services**

The behavioural shift has been immediate. When people know the data is visible and that leadership is looking at it daily, standards rise. If five visits were missed yesterday, the relevant manager knows about it today. Jason has drilled into the operations team that the dashboard is the first thing they look at each morning, because it tells them the problems that happened yesterday, not three weeks ago.

Ticket volumes, response times, and SLA performance are now visible by customer. Vehicle tracking data shows journey volumes and speeding incidents, and right-to-work compliance is tracked in real time.

At board level, the difference is equally tangible. The data is clean enough to measure movement between metrics over time, to set targets and track progress against them with confidence. Board reporting previously required significant manual preparation and reconciliation, now draws on a governed, consistent data set.

> *"If your data isn't clean, you're never going to be able to report in a way that gives them clarity. Now I've got a very clean data set that I'm able to report on more succinctly at board level. From an investment perspective, it's a big tick in the box."*
>
> **Jason Southwell, CEO, Smarter Services**

The next phase is already in motion. With the data foundations clean and governed, Smarter Services are exploring agentic action. When a metric breaches a threshold, the system will automatically notify the relevant manager and potentially trigger actions without anyone having to open the dashboard at all. Beyond that, an AI-powered contract intelligence project will extract commercial terms from contracts across the business and surface contracted revenue metrics for both operational and strategic decision-making.

The data had to come first. Fourteen weeks later, it is there, and the AI possibilities have opened up considerably.

Start where Smarter Services started.

Book an AI Readiness Assessment to find out where your data stands and what it would take to get a single source of truth in place.

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