

AUTOPILOT

Healthy Business



Introduction to AutoPilot

What is AutoPilot

We provide an overall AutoPilot concept that creates perfect conditions for a healthy business.

AutoPilot is software, business development and software support.

Our target group is consulting engineers and consulting architects world-wide.

To us, it is crucial that we know our customers' position and the conditions in which they do business.

We are therefore always developing ourselves to ensure that we fully understand the niche, within which we work.

We pride ourselves in developing the best software possible, giving the best recommendations for the development of your business and providing excellent software support.

This is our philosophy and why we think you should choose us.

AutoPilot
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The Process Loop

AutoPilot is founded on three basic principles: sound project management culture, sound registration culture and a sound billing culture.

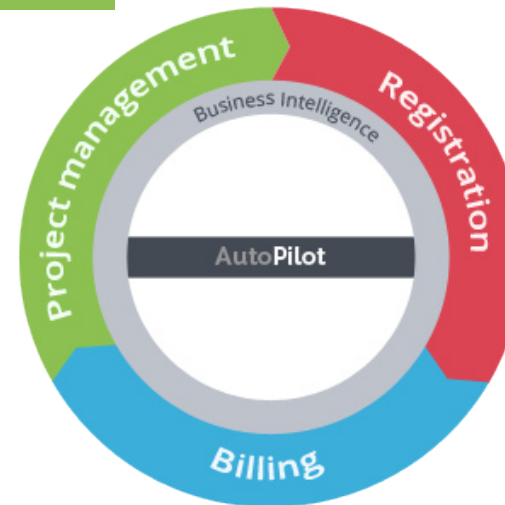
It reflects on the bottomline; a healthy business is good business.

Sound project management culture

- Be at the forefront
- Intervention
- Communication
- Business awareness

Sound and accurate registration culture

- Realistic registration
- Current and relevant information
- No duplication of work



Sound billing culture

- Invoice as soon as the basis for billing occurs
- No duplication of work

Project Business Information Model

AutoPilot is founded on a Project Business Information Model (PBIM).

Using this model, all aspects that have implications on the management and invoicing of customer projects are registered and handled.

This model provides a sound basis for knowledge management and Business Intelligence possibilities.

All employees keep their timesheet in AutoPilot.

The company's project leaders use the booking and planning system to manage the fees and Estimated Time to Complete budgets of projects.

Altogether, this helps the project leaders in their business practice and keeps the organisation at the forefront regarding the financial circumstances of

all projects.

AutoPilot integrates all the company's other systems such as finance, customer relationship management and document management systems through modern xml-based integrations.

Project Leader

The project leader creates the basis for the company's earnings by planning, billing and managing projects.

The project leader ensures accurate registration by creating and managing individually specific project plans.

Accurate registration is of great importance to all employees regarding knowledge sharing and Business Intelligence.

The Project Leader can

- Create and activate projects
- Register remuneration agreements
- Produce project plans including staffing and ETC
- Continuously revise the planning
- Monitor Expected Current Rate of Return against Target Rate of Return
- Plan future invoicing
- Create invoice proposals

The project leader is thereby business manager of his own projects.

Administration

Administrative staff manages data concerning the company's staff and their terms of employment.

By these means AutoPilot knows future hourly attendance and - along with the project planning - forms the basis of reporting challenges regarding resource capacity.

Furthermore, administration manages information about cost and sales prices of their employees and, held together with the project planning, enables AutoPilot to predict future earnings.

The Administration can

- Manage terms of employment
- Manage pricing structures
- Register expenses and subcontractor expenses
- Record invoices
- Produce statistics of any kind

The administration is thus a support function for the project leaders.

Management

The Management team is able to keep up to date regarding projects and are therefore able to prioritise and direct their efforts to manage challenges accordingly.

The Management team analyses the earning capacity of the entire project portfolio, both completed and ongoing, and what is in the pipeline.

The Management team designs the framework that will form the basis of the earning capacity analysis. E.g., it is possible to mark projects concerning their specific sector and then create past, current and future reports of the earning capacity ability of that sector.

The Management can assess

- Projects that are not on track according to their Target Rate of Return
- The company's future capacity scenario
- The company's future liquidity
- The company's earning capacity according to self-selected criteria

Planning

The planning overview is one of the cornerstones of AutoPilot. By regular revision of the project's ETC, the project leaders ensure that the finances are current in all projects.

The project leader therefore has control of the individual project's finances and can intervene, communicate and be business aware.

The project leader creates projects and activates them. Subsequently the project leader plans the progress of the project.

1 The project is then divided into work package and activities as required by the project leader.

Accordingly, the project leader is able to allocate the required staffing and create the ETC budget.

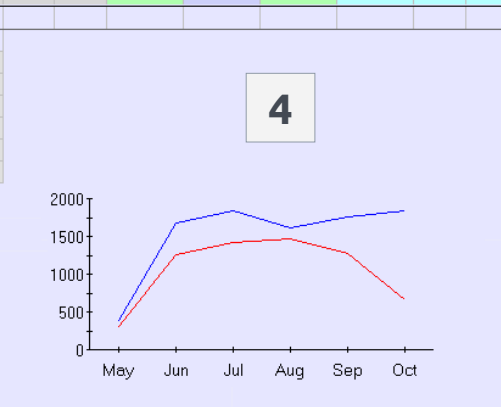
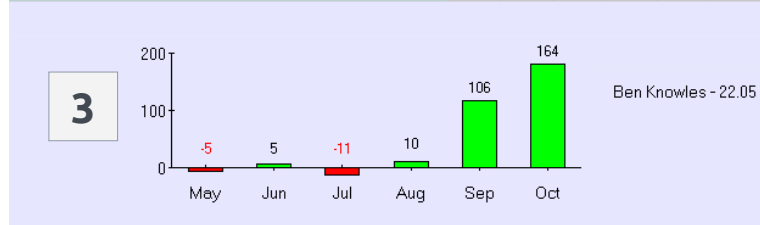
A simple colour coding will show if the activities are available for further registration of hours or not. This ensures a realistic registration and thereby reliable business intelligence data.

2 An Expected Current Rate of Return is calculated based on the number of hours used and ETC budget.

If the project's fee is divided between its activities, an Expected Current Rate of Return will be shown per activity. This gives the project leader an early warning for those activities that will have financial trouble. This makes it possible for early intervention if necessary.

Project no.	Identification	May	Jun	Jul	Aug	Sep	Oct	Later	Undistributed	Done-budget Hours	Spent Hours	Prese-budget hours	Agreement 1.000 £	TRR	CRR
13-214	Sustainable homes	40	110	105	110	110	50	30		546.0	611.0	1,157.0	98	2.10	2.11
13-218	Church Quinquennial Inspections	0	16		16	16		16		64.0	108.0	172.0		1.86	1.86
14-002	Special Needs Primary School	0	25	25	15					65.0	67.0	132.0	12	1.90	2.00
14-003	Conservation Roadmere House	0	35	65	55					155.0	100.0	255.0	22	2.00	1.84
14-031	Research facility	40	20							60.0	606.0	666.0	60	2.10	2.10
	C - Concept										538.0	538.0	15		0.66
	D - Design Development	25								25.0	68.0	93.0	18		4.71
	E - Technical Design	15	20							35.0		35.0	12		6.23
	F - Production Information												15		
	Ben Knowles - 22.05														
	Elizabeth Draper - 21.05														
	Jonah Dalby - 23.05														
14-031	Research facility	20	20	20	20	20				100.0	143.0	243.0	14	1.87	1.87
14-032	Arthur's Mission	20	24							44.0	40.0	84.0	7	2.00	1.93
14-034	Conversion warehouse to gallery	12	60	65	100	95	45			377.0	186.0	563.0	35	1.90	1.82
		16	16	16	16					64.0	52.0	116.0		2.06	2.06
14-037	Mallowcrest Harbour Promenade	30	135	165	125	235	195			861.0	24.0	885.0	80	2.20	2.27
14-032	Arthur's Mission		30	30	50	70	35	10		225.0		225.0	21	2.30	2.59

	2014	2014	2014	2014	2014	2014
	May	Jun	Jul	Aug	Sep	Oct
Company capacity	384	1,680	1,840	1,608	1,760	1,840
PM = SA Inv. projects	178	461	461	457	476	290
Probability project parts		30	30	50	70	35
Other PM Inv. projects	105	470	555	750	595	235
Not inv. projects	20	290	370	210	130	100
Vacant capacity	81	429	424	141	489	1,180



3 The planning overview shows the spare capacity for each employee and is used, in cooperation with other project leaders, to reallocate staffing resources that conflict with each other.

4 The Capacity Graph will quickly reveal if the budgeted staffing hours are nearing their capacity limit, and if it is time to bring in external resources, or if there is too little work in relation to the staffing hours available.

Sound project management is the foundation of a sound project management culture.



Timesheet

The timesheet is a cornerstone in AutoPilot. All employees fill in and submit their timesheets daily. This ensures the company has up-to-date information of all projects' management foundation.

1

The project leader has decided what activities are open to registration for each project. The timesheet automatically shows the activities an employee is allocated to.

2

The only thing the user needs to do, is to register the number of hours. It is possible to link notes and expenses to the hours. If the project leader has switched on the pencil icon, a note is needed about the number of hours spent.

3

The Submit function provides the user with the possibility of checking the figures before submitting them. After submitting, the registrations will automatically become part of the basis of billing and automatically enter into the project leader's planning and forecast of the projects' Expected Rate of Return.

A sound and accurate culture of registration is fundamental for a sound project management culture.

3
Week 23 - June 2014

Project no.	Project name	Activity	Mon 02	Tue 03	Wed 04	Thu 05	Fri 06	
13-218	Church Quinquennial Inspections	L - St Mary's Allenby						
		L - St. Albans, Huntington						
		L - St. Jonh's, Broughhamoto	3.5					
14-037	Mallowcrest Harbour Promenade	D - Design Develop	4.5					
14-036	Standard Houses, development	C - Concept		1.5				
		D - Design Development		3	1	4		
14-003	Conservation Roadmere House	B - Design Brief						
		C - Concept				2		
14-035	Interior design Childrens' ward	A - Appraisal			2			
14-031	Research facility	C - Concept						
		D - Design Development		4	5.5			
		E - Technical Design						
		F - Production Information						
14-038	Dormouse Conservation Centre	B - Design Brief						
		K - To Practical Completion						
		X01 Administration						
		X05 In-service Training						
		X06 Computers and Network						
		Y01 Paid Holiday						
		Y02 Sick leave						
Y06 Unpaid Holiday								
Standard hours			40.00	8	8	8	8	8
Entered hours			33.00	8	8.5	8.5	8	

Paid holiday left

Unpaid holiday left

Billing

The billing system has access to all elements in the Project Business Information Model, such as:

- The agreed fee
- The number of hours spent
- Subcontractor expenses and other expenses
- Instalment payment plans for billing

The billing system provides the most outstanding service to the customer:


- The invoice can be sent as soon as the basis for billing occurs
- The invoice can show work packages to match the demands of the customer
- Previous invoices, the remainder of the billing and remaining balance can be shown
- The number of hours spent can be shown including any notes employees may have made

The project leader registers the agreed fees and the fee breakdown.

The project leader can continuously review the project's ETC Plan and create invoice proposals for the projects. Thereby the project leaders have an overview of the finances of all projects.

In this way, project leaders perform sound project management by:

- Being at the forefront
- Intervening
- Communicating
- Being business aware

Universal Connectors Inc 34 Pine Drive GU27 Haslemere				 HAMPTON ARCHITECTS	
INVOICE					
PROJECT: 14-031- Research facility					
					No. 13
					Date 27.05.2014
					Due date 10.06.2014
April 2014 - May 2014					
Fee	Qty	Price	Total		
B - Design Brief					
Ben Knowles	16.00 timer	80.00	1,280.00		
Elizabeth Draper	24.00 timer	80.00	1,920.00		
Jonah Dalby	28.00 timer	80.00	2,240.00		
Simon Ashton	4.00 timer	90.00	360.00		
Syree Mendel	8.00 timer	55.00	440.00		
William Reynolds	32.00 timer	90.00	2,880.00		
C - Concept					
Simon Ashton	7.00 timer	90.00	630.00		
Total fee				£ 9,750.00	
Total				£ 9,750.00	
VAT 20%				£ 1,950.00	
Invoice total				£ 11,700.00	
Bank of England Account no. : 45789 IBAN : UK17873345 VAT no. : UK1745769 BIC/SWIFT : BANKUK789					
<small>Payment is due within 14 days net of the above invoice date. Hampton Architects reserves the right to charge interest equal to the lending rate of Bank of England with appendix of 7% p.a on all charges unpaid 14 days net after the invoice date.</small>					
HAMPTON ARCHITECTS UK reg. n: 1234567		London: 10 Fleet Street UK-London EC4Y 8BQ		T: +44 (0)20 7427 1530 arch@hampton.com www.hampton.com	

Hour specification for invoice no. 13	
Project: 14-031 - Research facility	
▼ B - Design Brief	
Ben Knowles	Hours Note
Date	
12-05-2014	4.00 Sketches
13-05-2014	4.00 Sketches
14-05-2014	4.00 Sketches
15-05-2014	4.00 Phone meeting w client
	16.00
Elizabeth Draper	Hours Note
Date	
22-04-2014	8.00 collating project materials
23-04-2014	8.00 ideas meeting
14-05-2014	8.00 Sketches
	24.00
Jonah Dalby	Hours Note
Date	
10-04-2014	8.00 initial sketches
11-04-2014	8.00 initial sketches
24-04-2014	4.00 Sketches
07-05-2014	8.00 Meeting w Client at client office
	28.00
Simon Ashton	Hours Note
Date	
22-04-2014	4.00 Sketches
	4.00
Syree Mendel	Hours Note
Date	
17-04-2014	8.00 Phone meeting w client
	8.00
William Reynolds	Hours Note
Date	
25-04-2014	8.00 sketches
21-05-2014	8.00 Sketching
22-05-2014	8.00 Sketching
23-05-2014	8.00 sketching
	32.00
▲ Sum 112.00	
▼ C - Concept	
Simon Ashton	Hours Note
Date	
19-05-2014	4.00 technical drawings
20-05-2014	3.00 technical drawings
	7.00
▲ Sum 7.00	
Sum 119.00	

A sound billing culture completes a sound project management culture.

Knowing your Business

The Management team is able to analyse the company's earning capacity apportioned on self-selected criteria, by using business intelligence.

The Management team sets up the framework for the analysis themselves.

In the example below, the Management team has divided the company into sectors and grouped the projects by fee ranges.

FEE	BUSINESS UNIT			
	Leisure	Living	Health	Work
<100k	1,5	2,2	1,9	2,1
100-250k	1,2	1,5	1,8	2,6
250-500k	1,8	2,6	2,0	2,4
500-1000k	2,2	2,2	2,8	1,6
1000k+	2,5	2,1	2,8	2,7

Figure: Current Rate of Return per sector and fee range.

The AutoPilot concept of software, business development and software support aids everything in regards to realistic registration.

Through continued and sustained support from the Management team, this will ensure reliable data and thereby reliable Business Intelligence.

Business critical decisions will then become well-founded.

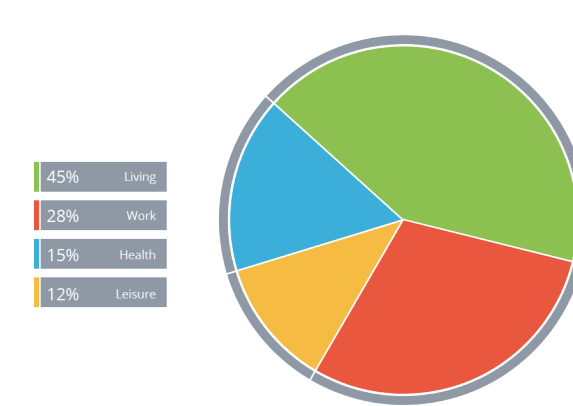


Figure: Distribution of turnover per sector.

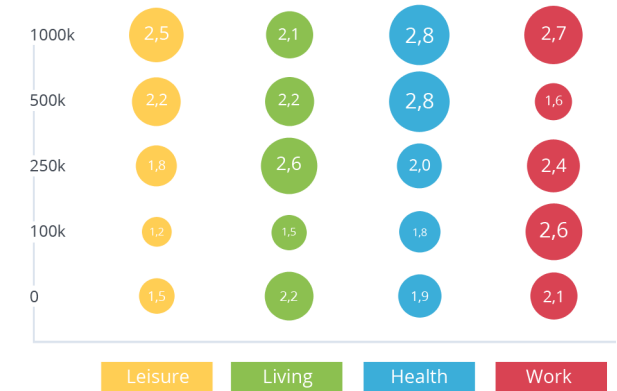


Figure: Current Rate of Return per sector and fee range.

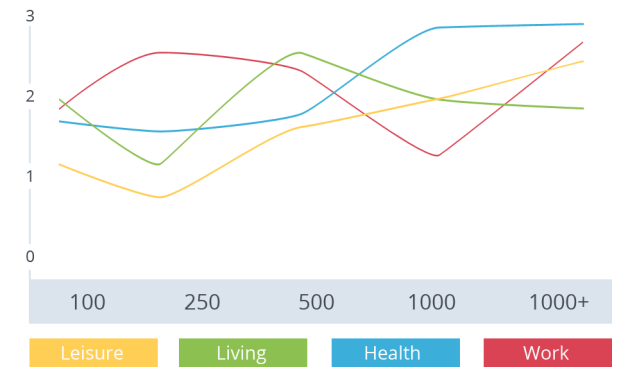


Figure: Current Rate of Return per sector and fee range.

The road to success

AutoPilot is software, organisational business and software support.

We will develop an implementation plan to successfully embed AutoPilot in your organisation

A steering committee consisting of representatives from your management and administration teams will handle the management of the change process.

The steering committee's most important role is to define success criteria and follow up on them.

The implementation process will broadly consist of a mix of steering committee meetings and work-

shops, so everybody in the organisation knows their functional responsibilities in relation to the use of AutoPilot.

The aim of our software, training and support is to develop a lasting project management culture – as this is the road to success.

A sound project management culture consists of:

Sound project management

The project leader therefore has control of the individual project's finances and can intervene, communicate and be business aware.

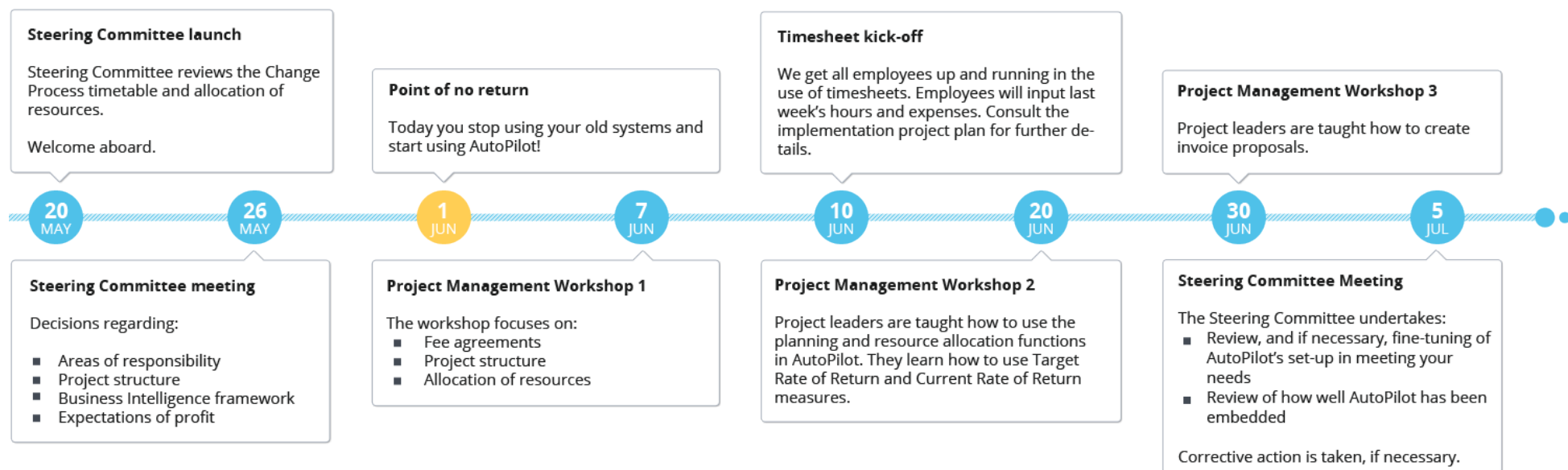
Sound culture of registration

Your registrations will be realistic, relevant and current. This is the foundation for being at the forefront of a project's finances and resource capacity. Sound registration is a valuable underlying point for useful knowledge management and reliable business intelligence.

Sound culture of billing

The project leaders will provide your customers with the finest service with sound and documented invoices.

Healthy business is also good business.



Flow chart: Incorporation of the AutoPilot concept is an ongoing process with a steady focus on the development of the business and profit.