



Purpose-Built Business Solution for
B2B Service Providers

Whitepaper

Document ID: SBOS-DS-2.1

Introductory Note

This whitepaper presents **SBoS (Service Business Operating System)**, a software solution designed to address the distinct challenges of B2B service providers. Covering both *Enquiry-to-Contract (E2C)* and *Call-Out-to-Cash (C2C)* processes, SBoS integrates service modeling, contract acquisition, operations excellence, and billing into a single platform. The paper details functionality, key capabilities, and business benefits, providing a blueprint for service organizations seeking to optimize performance and profitability.

1. Executive Summary

SBoS is a unified platform designed to help B2B service providers standardize, operationalize, and optimize their service portfolio. From **Enquiry to Contract (E2C)** to **Call-Out to Cash (C2C)**, SBoS ensures efficiency, compliance, mobility, and profitability across industries.

2. Key Value Propositions

- Standardize service definitions across business units and geographies.
- Accelerate **E2C cycles**, converting enquiries into contracts efficiently.
- Streamline **C2C execution**, from call-out requests to invoicing and revenue realization.
- Automate billing and eliminate revenue leakage.
- Gain actionable insights on profitability, utilization, and ROI.
- Ensure regulatory, safety, and quality compliance at every stage.
- Enable mobile access for field staff, service leads, and managers.

3. End-to-End Process Coverage

A. Enquiry to Contract (E2C)

SBoS streamlines the customer acquisition process:

- Capture enquiries, assign to the sales teams and generate accurate, customer-aligned quotations.
- Pull service scope, billing rules, and resource requirements directly from Service Modeling.
- Include add-on resource cost dynamically (manpower, materials, equipment, subcontractors).
- Convert accepted quotations into executable contracts with inherited rules.
- Maintain contract governance, terms, and SLAs.
- Mobile access for sales teams to approve quotations and monitor contracts.

Key Outcome: Faster contract creation, fewer errors, and standardized service offerings across clients.

B. Call-Out to Cash (C2C)

SBoS manages operational delivery and revenue realization:

- Convert service call-outs into Work Orders linked to active contracts.
- Schedule and Assign work orders
- Mobilize resources and logistics efficiently.
- Execute services with checklist-driven compliance and quality verification.
- Capture on-site delivery reports and client acknowledgments.
- Automatically generate invoices based on approved delivery reports, timesheets, and contract rules.
- Post GL entries and trigger Accounts Receivable processes.
- Mobile-enabled field reporting, asset tracking, and approvals.

Key Outcome: Efficient service execution, accurate billing, traceability, and accelerated cash realization.

4. Detailed Modular Capabilities

4.1. Service Modeling

The Service Modeling module is the foundation of Servizio, enabling organizations to design and define their complete service portfolio. It empowers businesses to standardize, structure, and operationalize various types of B2B services—be it industrial, engineering, field, or consulting.

Key Capabilities:

- **Service Portfolio Definition**
Create and maintain a structured catalog of all service offerings, including descriptions, categories, and associated deliverables.
- **Delivery Model Configuration** - Model each service as one of the following:
 - Packaged Service – Scope-based delivery with fixed inclusions
 - Time & Material (T&M) Based Service – Based on actual effort and usage
 - Resource-Based Service – Based on deployment of specific personnel or assets
- **Resource and Time Modeling**
Define resource roles, skill sets, effort estimates, and time required to deliver each service. For packaged services, model delivery based on the scope and service quality levels.
- **Billing Framework** - Configure billing rules including:
 - Standard pricing
 - Add-on billable components
 - Conditional pricing rules
 - Milestone or output-based billing
- **Delivery Mechanism Setup** - Define how services are delivered and tracked:
 - Report-based Delivery – Final deliverables in the form of structured reports
 - Timesheet-based Delivery – Staff submit hours for approval
 - Weekly Work Report-based Delivery – Teams report periodic progress for review
- **Document Automation**
Specify and auto-generate required documents such as service orders, delivery notes, certificates, or client acknowledgment forms.
- **Checklists and Compliance Controls** - Integrate configurable checklists at different stages:
 - Safety Checklist
 - Regulatory Compliance Checklist
 - Pre-requisite Verification
 - Execution Steps Checklist

4.2. Service Sales and Contract Acquisition

The Service Sales and **Contract Acquisition** module in SBoS empowers sales teams to configure and deliver customer-aligned service proposals while maintaining consistency with predefined service models. It seamlessly connects **enquiry handling**, **quotations**, **contracting**, and **service initiation** into one unified flow.

Key Capabilities:

- **Quotation Management**
 - Respond to customer enquiries by building service quotations tailored to specific needs.
 - Pull service components, resource requirements, billing rules, and delivery configurations directly from the Service Modeling module.
 - Adjust resource responsibilities or service inclusions based on customer requests.
- **Flexible Resource Provisioning Rules**
 - Define and configure all required resources including:
 - Crew / Manpower
 - Materials
 - Vehicles
 - Equipment
 - Subcontracted or third-party services
 - Mark specific resources as **billable** or **included** in packaged pricing.
 - Enable dynamic pricing adjustments—for example, if a customer offloads resource responsibility to the service provider, pricing can be revised accordingly.
- **Customer-Aligned Offer Structuring**
 - Maintain standardization while offering flexibility:
 - Tailor service scope and pricing based on customer responsibilities or exclusions.
 - Ensure all quotations adhere to baseline rules and configurations from the service model while allowing override where permitted.
- **Service Contract Creation**
 - Convert accepted quotations into service contracts.
 - Contracts inherit all base rules from the service model, including deliverables, billing, and resource roles—but can be further customized.
 - Serves as the **governing document** for delivery, billing, and coordination.
- **Service Call-Out Requests**
 - Customers can raise service execution requests (call-outs) under the contract.
 - Each call-out is converted into a **Work Order**, initiating the operational delivery process.
 - Enables clear tracking, assignment, and execution by service delivery teams.

4.3. Service Delivery Operation

The **Service Delivery Operations** module manages the real-time execution of services as per customer contracts and work orders. It orchestrates everything from resource mobilization to client confirmation, ensuring services are delivered efficiently, compliantly, and in line with the chosen delivery model.

Key Capabilities:

- **Work Order Assignment**
 - Starts when a **work order** is assigned to a **Crew Lead**, individual resource, or a **Service Delivery Unit**, based on the nature of the service.
 - Supports various delivery scenarios—from solo consultants in T&M contracts to full crews for complex engineering services.
- **Service Model-Driven Execution**
 - The operational flow is governed by the predefined **service model**, which dictates:
 - Who leads the service execution
 - What resources are needed
 - How delivery is verified
 - What documents or checklists are mandatory
- **Resource Mobilization & Logistics**
 - Assign or issue all required resources against the work order:
 - **Crew / Personnel**
 - **Materials** and **consumables** (issued from store/warehouse)
 - **Equipment** (pre-assigned or issued as needed)
 - **Transportation arrangements**
 - Ensures all logistics and dependencies are addressed before on-site execution.
- **Checklist-Based Execution Readiness**
 - Delivery teams must complete pre-configured checklists, such as:
 - Pre-site safety checks
 - Compliance validations
 - Execution steps checklist
 - These ensure readiness before service commencement.
- **On-Site Execution and Client Acknowledgment**
 - Services are executed as per the scope.
 - A **Delivery Report** is generated and acknowledged/signed by the client.
 - This report is routed to billing for invoicing.

- **Support for Multiple Delivery Models:**
 - **Time & Material (T&M) Based Delivery**
 - Work orders allocate resources, but billing is driven by:
 - Timesheet approval by client
 - Resource deployment report approvals
 - Contractual quantities, rates, and terms
 - **Packaged or Fixed Scope Services**
 - Billing is based on:
 - Completion of deliverables
 - Client-approved reports or milestones
 - Predefined effort or output metrics
 - **Leasing or Rental-Based Services**
 - Equipment is mobilized and tracked over a leasing period.
 - Billing is based on:
 - Duration of use
 - Quantity consumed or utilized
 - Associated support services provided

Service delivery operations module ensures **end-to-end coordination**, **resource accountability**, and **billing readiness**—all aligned with contract terms and service models.

4.4. Integrated Service Billing

The **Service Billing** module automates the end-to-end billing process, ensuring accurate and timely invoicing across all service delivery models. It is tightly integrated with **service contracts**, **work orders**, **resources**, and the **financial module**, eliminating manual intervention and reducing billing errors.

Key Capabilities:

- **Automated Invoice Generation**
 - Automatically generates invoices based on:
 - Approved delivery reports
 - Verified timesheets
 - Contractual terms and pricing rules
 - Resource utilization and billable components
- **Contract-Driven Billing Logic**
 - Pulls rules directly from the **service contract**:
 - Pricing structure
 - Billing cycles and terms
 - Tax rules and billable items

- **Financial Integration**
 - Seamlessly integrated with the **Financial Module**
 - Automatically posts **General Ledger (GL) entries** upon invoice generation
 - Triggers the **Accounts Receivable (AR)** process and updates customer balances
- **Error-Free and Audit-Ready**
 - Ensures consistency between what was delivered and what is billed
 - Provides a clear audit trail from contract to invoice

5. Mobility

SBoS provides **mobile support** that empower field and remote teams with:

- Access to work orders and status information
- Delivery leads can update work order status on the move
- Document search, upload and download.
- Electronic review and approvals
- Client acknowledgment capture from the field.

6. Business Value Delivered

- Standardization & Compliance – Consistent service models across customers and industries.
- Operational Efficiency – Streamlined enquiry-to-contract and call-out-to-cash cycles.
- Revenue Assurance – Automated billing minimizes leakage and disputes.
- Scalability – Ready to handle growing service portfolios and new business models.
- Customer Trust – Transparent processes and accurate billing improve client satisfaction.

7. Conclusion

SBoS is not a generic ERP or CRM add-on — it is a **purpose-built operating system for B2B service businesses**. By covering the entire service lifecycle, it helps companies reduce costs, eliminate inefficiencies, and drive profitability while improving customer relationships.