**ZTS** ADVISORY

THE CASE FILE

# The layer between the call and the booked job.

*One engagement measured end to end, and eleven more from the same layer: contact centres, intake, booking flows, and the boards that fund the fixes.*

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THE FLAGSHIP CASE · MEASURED · INDEPENDENT

# Recovering booked revenue at a PE-backed plumbing platform

A three-location, private-equity-backed plumbing platform was winning demand and losing too much of it before it booked. I rebuilt the layer between the call and the dispatched job.

| ≈120 | ≈$39K | ≈$470K |
| --- | --- | --- |
| booked jobs a month recovered | a month, at the platform's average ticket | a year |

## WHAT LEAKED

Demand was fine. The leak sat in the operating layer between the customer and the booked job: the online booking path added friction, intake and follow-up ran differently at each of the three locations, and calls were slipping through at peak and after hours.

## WHAT I BUILT

1. **Closed the after-hours gap.** Missed and after-hours calls now get an instant text-back that routes to online booking, capturing demand that used to go to voicemail.
2. **Redesigned the online booking flow** so the demand that starts a booking finishes it.
3. **One intake and follow-up model across all three locations.** Every site runs the same steps from first call to booked job.
4. **Set up an IVR** to catch overflow calls and route them fast.

## HOW I COUNTED THE NUMBERS

I counted booked jobs: the roughly 120 additional jobs a month comes from the platform's booking counts before and after the rebuild, and total bookings rose across channels, which rules out phone volume simply shifting to the web. The dollar figures come from that job count at the platform's average ticket rather than a separately measured revenue line. A walkthrough of the anonymized before-and-after data is available on request.

*The fixes themselves were commodity: a text-back tool, a booking-flow rebuild, an IVR, one intake standard. Any platform can buy that stack in a week; most already have, and most see nothing for it. I ranked the leaks in dollars before spending on any of it.*

THE FIELD RECORD

# The same layer, at other scales.

Only the flagship case carries measured dollar claims. The record below is the rest of the work: blinded clients, attributed eras, and the pattern each one proves. Where a number appears, the verb tells you what it is: measured, identified, or approved.

DELOITTE DIGITAL / CONTACT-CENTRE TRANSFORMATION

## An 800,000-customer utility, rebuilt from the call flow up.

Agents toggled six or more applications per interaction. I ran the diagnostic through agent shadowing, call-flow analysis, and journey mapping, then designed the target operating model across IVR, digital self-service, and agent-assisted channels. The work surfaced 50+ service improvement opportunities, and an early self-service release cut routine call volume in its first quarter. Deloitte Green Dot Award.

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DELOITTE DIGITAL / VIRTUAL-AGENT STRATEGY

## A top-five North American bank, after deployments that failed on integration.

I assessed five platforms against 30+ criteria, mapped the top 20 call drivers to size what a virtual agent could genuinely handle, and designed the target-state integration architecture. The bank approved the vendor and began a phased pilot.

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INDEPENDENT / PE VALUE CREATION

## A PE-backed healthcare technology company, 18 months post-close and off thesis.

My diagnostic ran across commercial strategy, operations, and technology, and traced roughly 60% of the margin compression to three operational bottlenecks fixable in six months. The sponsor used the 15-initiative plan to restructure incentives and reallocate capital.

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INDEPENDENT / PE VALUE CREATION

## A 100-day plan, delivered 60 days post-close.

A rapid five-dimension digital-maturity assessment with peer benchmarking identified more than $3M a year in savings from process automation. The plan structured the sponsor's first board presentation.

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INDEPENDENT / INTAKE AUTOMATION

## A retained executive search firm's intake-to-booked-match layer.

The path from client brief to booked shortlist ran on re-keying and memory. I automated the workflow end to end. Different industry, same layer ZTS works for service platforms: the distance between an inquiry and booked revenue.

INDEPENDENT / BUILD IN-HOUSE

## An LLM content platform for a mid-size financial institution, shipped in 12 weeks.

I designed and delivered the platform with automated compliance pre-screening built in. Content creation time fell about 60%, and compliance review went from five days to same-day.

INDEPENDENT / AI ADOPTION

## An AI operating model stuck at 15% adoption, despite executive sponsorship.

At a large consulting firm, I built a 25-person champions network, role-specific playbooks, and working feedback loops. Adoption reached 72% within six months, worth around eight hours per consultant per week. AI sticks when the process underneath it is stable.

INDEPENDENT / BOARD-READY CASE

## An AI investment case an executive committee actually funded.

For a large professional services firm, I quantified pilot results into a board-ready case across three deployment scenarios with go/no-go gates. The committee approved and funded enterprise deployment.

INDEPENDENT / SERVICE DESIGN

## A top-tier bank's financial-wellbeing service, redesigned around the advisor.

I mapped the advisor-client journey and built the future-state operating blueprint integrating digital tools with human advisory, then piloted it to lift customer trust and share of wallet.

INDEPENDENT / AI READINESS

## A 50,000-member credit union's road into AI.

I assessed member experience, data maturity, and AI readiness. The board approved Phase 1 of a three-year roadmap, starting with member-communication automation.

INDEPENDENT / OPERATING MODEL DESIGN

## A large government agency's mandate expansion.

I ran the organizational assessment and designed the target operating model. The Deputy Minister endorsed it, and the digital services division stood up within four months.

HOW TO READ THIS FILE

# The claims policy behind these pages.

The flagship case is measured: booked jobs counted before and after, dollars derived at the platform's average ticket. Every other case is narrative with blinded clients. Work done at Deloitte Digital is attributed to Deloitte Digital and described without client names or confidential material; independent work is attributed to ZTS. Nothing here is a composite, and no number is dressed up as measured when it isn't.

The thread through all twelve: a business pays to create demand, and an operating layer of calls, intake, booking, and follow-up decides how much of that demand becomes revenue. I work on that layer. Sometimes the client is a three-truck plumbing brand, sometimes an 800,000-customer utility. The leak looks the same; only the ticket size changes.

## WHERE THIS GOES NEXT

For a PE-backed service platform, the entry point is a Revenue Leak Diagnostic: three to four weeks, one flagship brand, your own data, ending in a ranked, dollar-sized leak map delivered as a board-ready read-out. Bring one commercial question and I'll tell you straight where I'd look first, and whether ZTS is the right help.

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ZTS Advisory is an independent revenue-capture practice for PE-backed, multi-brand service platforms doing $20M to $500M in revenue: one specialist on the layer between the call and the booked job. Independent; no fund, nothing to sell you but the work.