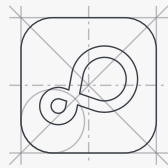




ONROUTE INTELLIGENCE. WHITEPAPER. 21 SEP 2026.

OI-WP-001

YOUR BRAND IS ~~THE VAN~~ THE INSTALLER



Every job costs money to win. The work a good visit brings in costs nothing like as much, and it is decided at the door by someone who may not work for you. What they know when they arrive is up to you.

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THE LAST NINETY MINUTES

An installation business spends a great deal of its money getting to the front door. The signwriting on the van, the website, the paid search, the quote somebody priced on a Sunday evening, the follow-up call, the deposit taken. All of it buys one thing: permission to send a person to a customer's house.

Then it hands the whole relationship to that one person, on their own, for as long as the job takes: a couple of hours at the very least, a morning for many, three days across two trades for some. Nobody supervises it, and there is exactly one chance to get it right.

Think about what it took to win the job. The lead was bought, somebody quoted it, somebody surveyed it, somebody chased it. Every job costs money to win. The work a good visit brings in costs nothing like as much. The battery after the panels, the neighbour who asks who did the work, the landlord's other properties, the service contract. None of them starts with a bought lead, and every one of them is won or lost at the door. That makes the visit the cheapest source of the next job a business has, and it is already in the diary.

EVERY JOB COSTS MONEY TO WIN. THE WORK A GOOD VISIT BRINGS IN COSTS NOTHING LIKE AS MUCH.

And that person often goes in with an address, a time slot and not much else. There is no history on the customer, no note of what was said on the phone at half past four on Thursday, and no flag that this is the second job at the address or that the first one overran and the customer took a morning off work for it. There is nowhere to record what the installer notices while they are standing there, except a text to the office, sent later from a lay-by.

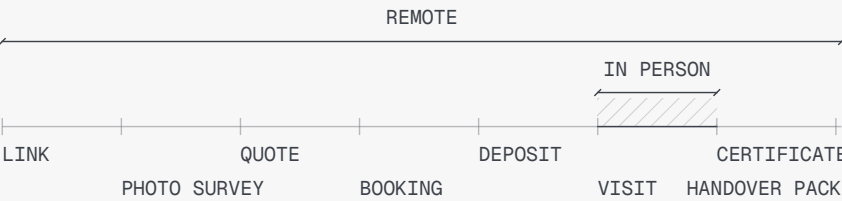
The strange part is where the attention goes. The numbers that get looked at every week, the leads, the quotes out and the quotes won, are all about getting to the door. What happens on the other side of it is measured afterwards, if at all, and nobody briefs the person who goes through it.

WHAT THE VISIT ACTUALLY IS

Three things are true of the visit at once, and a business that sees only one of them will underspend on it.

It is the only face-to-face contact. Everything else in a modern installation job can happen through a screen, and increasingly it does. In Onroute Intelligence the customer taps a texted link, photographs the meter and the board with the door open, and answers only what a photograph cannot show. The survey writes itself, the quote itemises from the firm's own price list, the customer picks a date and pays, all under the firm's own brand. A straightforward domestic job skips the survey visit entirely.

That is better for the customer, and it puts more weight on the visit. The better the front end works, the fewer times anyone from the firm is in front of the customer, and the more rides on the one time somebody is. Take the survey visit out and the install day carries the lot.



THE CONTACT LINE. EVERYTHING BUT THE VISIT CAN HAPPEN THROUGH A SCREEN. THE VISIT CANNOT.

It is where the promise gets kept or broken. Most of what the customer has been told so far came from the website and the quote. What turns up is a person, a van and a few hours of behaviour. If the installer knows the customer's name, knows the job, parks where they said they would and leaves the place clean, the promise was true. If they arrive without a clue what they have come for, it was not. No amount of marketing makes up for that.

This is sharpest where the person at the door does not work for the name on the paperwork. A manufacturer's product is fitted by an installer network. A national provider runs a job through a main contractor who passes it to a local firm. If you make chargepoints, heat pumps, solar panels or batteries, your product's reputation is decided on someone else's ladder, by a fitter you have probably never met, and when the fit goes badly the review is of your product. Inside a single company it is the same thing one step closer: the reputation is decided by whoever was free on Thursday.

And it is as good a sales conversation as the business will get. The customer has already bought. They are standing next to the thing being fitted, they are interested in it, and they are talking to the only person who will ever be in a position to say what else the property needs. No email or advert can do that.

WHAT GOES WRONG AT THE DOOR

The examples below are from UK chargepoint work, where the jobs are short, they come in volume and the failures are easy to see. Anyone

who sends people into customers' homes will recognise them, and a solar, battery or heat pump job has its own list that goes wrong in the same places.

The brief does not exist. The customer told somebody on the phone that the meter is in a locked cupboard and the neighbour holds the key. That went into a call note, or a memory, and then into nothing. The office holds the job together because the tool it uses only has room for part of it: the grid notifications are in someone's sent folder, the grant claims in a spreadsheet, the certificates in a camera roll, and next week's plan on a whiteboard nobody photographs. The tool still works. The brief the installer needed was never written down, because the tool had nowhere to put it.

THE BRIEF THE INSTALLER NEEDED
WAS NEVER WRITTEN DOWN, BECAUSE
THE TOOL HAD NOWHERE TO PUT IT.

The job was priced off a photograph in a messaging app, and the photograph did not show the thing that matters. The installer arrives, looks at the supply, and the job cannot be done today.

	FOUND ON SITE	NEEDED FIRST	WHO ABSORBS IT
	NO OFF-STREET PARKING	A CHECK BEFORE BOOKING	THE FIRM, IN A WASTED TRIP
	MAIN FUSE TOO SMALL	A SUPPLY UPGRADE	THE CUSTOMER, IN WEEKS
	LOOPED SUPPLY	THE NETWORK OPERATOR	THE CUSTOMER, IN WEEKS
	EARTH ROD REQUIRED	EXTRA MATERIALS AND TIME	THE FIRM, IN MARGIN
	THREE-PHASE SUPPLY	A HUMAN LOOK AT PRICING	THE OFFICE, IN REWORK
	WHAT TURNS A BOOKED VISIT INTO A WASTED TRIP.		

The customer was given a morning or an afternoon, and then waited. They rang at eleven to ask. The office did not know either, because the office is looking at the same diary the customer cannot see. Every one of those calls counts against the visit before the van has arrived.

The evidence the visit was supposed to produce goes missing, and nobody finds out for weeks. The installer leaves, and the photograph of the serial number was never taken. From 1 April 2026 an installer claiming under the chargepoint grant schemes has to show more photographic evidence than before, specifically the charger, its serial number, the parking space and a wide shot of the building.^[1] Miss one and the claim cannot be made. Either the firm swallows the grant or the customer gets a bill they were told they would not get, and they do not blame the scheme.

The paperwork comes apart from the job. The photographs are on a phone, the certificate is a PDF in an email, the handover documents are in a folder named by whoever filed them. Six months on, the customer asks for their certificate again and somebody spends twenty minutes looking for it. Twenty minutes is nothing. A customer who has to ask twice for their own certificate has decided what kind of company this is, and they will say so when the neighbour asks.

The day itself is a zig-zag across the county, so the installer arrives late, rushed, or not at all. Nobody who has spent half an afternoon driving between two jobs that were eleven miles apart does their best work at the second one.

None of these is a failure of the installer. Every one of them is a failure to give the installer what they needed before they knocked. Nor is it the office's fault, or yours. The office has been holding the job together by hand, and doing it well, because there was nowhere else to hold it.

ARRIVING WITH THE JOB IN HAND

Now take the same visit, with four things changed. The brief exists, and it was written by the customer. In Onroute Intelligence the customer's own photographs produce the job notes the installer reads before setting off: access, parking, the cable run, and what still needs checking on site. Nobody typed those notes. They are a by-product of the customer doing the survey themselves, and they are on the job before the van is loaded.

The right person was sent. Who is eligible for a job is decided by trades and qualifications, working hours, shift patterns, home bases and patches, and approved time off comes off the diary before anyone is booked. Qualifications carry expiry dates and are flagged before they lapse, so the person at the door is certified for the work they have turned up to do, and the scheme account their certificate will go under is already on file.

The day is a run rather than a zig-zag, and the customer was told a window the business can keep, worked out from the planned route and updated when the day changes.

And the work can be done where the work is. The field app takes photographs, forms, test results, the certificate and the signature with no signal at all, and syncs when the installer is back in the van. Lofts, plant rooms and rural driveways stop being a reason the record gets made later, from memory, at nine in the evening.

One more thing changes. The installer has somewhere to put what they saw. A defect, a second board on its last legs, a customer who mentioned they are having the roof done in spring. It goes down as a task with a name and a date on it, raised on the job while they are still standing in front of the thing.

THE PAPERWORK IS THE LAST IMPRESSION

There is a moment at the end of every visit that decides how the job is remembered, and it is usually left to chance.

The installer either says “I’ll email the certificate over in the next few days”, or they hand it over before they leave. Those two sentences describe the same work and produce opposite customers. The first one says the job is not finished. The second says it is.

ON SITE

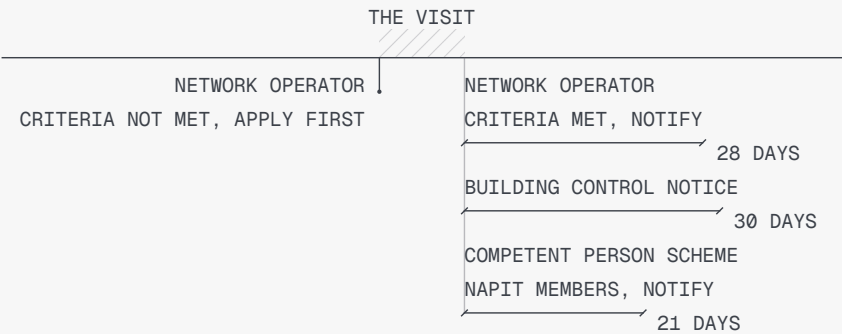
TEST RESULTS ARE TYPED IN ON SITE. THE CERTIFICATE IS SIGNED ON THE INSTALLER’S PHONE AND EMAILED TO THE CUSTOMER BEFORE THE VAN LEAVES.

The handover pack is the same argument one step out. Certificates, manuals, warranties and the photographs, assembled into one pack when the job is signed off, sent to the customer and kept on the job for whoever audits it later. The customer gets a finished thing rather than a promise of one, and the firm gets the same pack back on demand for as long as it exists.

The evidence for everything that has to follow is also captured while the installer is standing in front of it. The photographs the grant scheme wants are asked for on site, not reconstructed from a camera roll a fortnight later. If a test result is missing, the installer hears about it on site rather than from an auditor weeks afterwards. Notifiable work goes to building control

under the firm's own competent person scheme, with the reference filed against the job.

That matters because the clocks do not wait, and one does not even wait for the visit. The network operator's duty lands on one side of it or the other: an application before anyone connects, or a notice within twenty-eight days of installing. The moment the van leaves, building control's thirty days are running too, and on a solar, battery or heat pump job a clock of the scheme's own.



SECTION THROUGH A CHARGEPOINT JOB. THE NETWORK OPERATOR'S DUTY LANDS BEFORE THE VISIT OR AFTER IT, BY THE ENA FORM'S NOTIFICATION CRITERIA: MET, NOTICE WITHIN 28 DAYS OF INSTALLING; NOT MET, AN APPLICATION BEFORE ANYONE CONNECTS. BUILDING CONTROL RUNS FROM COMPLETION OF THE WORK. A NAPIT MEMBER NOTIFIES ITS SCHEME WITHIN 21 DAYS, SO THAT THE SCHEME CAN MEET THE 30.^[2] A SOLAR, BATTERY OR HEAT PUMP JOB ADDS A CLOCK OF ITS OWN.^[3]

Each of those windows is filled from evidence that either was or was not captured while the installer is on site. That is why the visit is more than the delivery step at the end of a sale. The company's compliance record, its cash position and its reputation are all written there at once, by one person, usually on their own.

WHAT THE VISIT IS WORTH AFTERWARDS

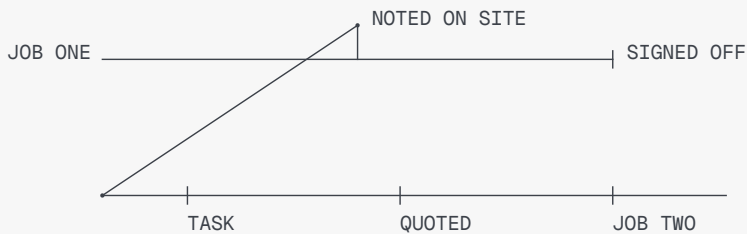
We are not going to put a number on what the visit is worth, because we do not have one we could defend. What follows is an argument about mechanism, not a claim about magnitude.

Start with the next job. Repeat and referred work in the trades is won by the memory of the last visit, and that memory is made of small things: whether the person knew what they had come for, whether they turned up when they said, whether they cleaned up, whether the paperwork arrived. A customer who received a finished job has nothing to hesitate about the second time. A customer who spent three weeks chasing a certificate has already decided.

Then the upsell. The installer is good at it because they are not a salesperson. They came to fit something, the customer knows it, and they are the only person in the whole transaction who has seen the property with their own eyes. The recommendation lands because the person making it is standing in front of the thing.

THE RECOMMENDATION LANDS BECAUSE THE PERSON MAKING IT IS STANDING IN FRONT OF THE THING.

For that to be worth anything, the installer has to know what the company can do, and there has to be somewhere for what they spotted to go. Both are ordinary operational problems and both are solvable. The current version of every manual, install guide and site pack lives in one library in Onroute Intelligence, scoped by team, trade and job type, answerable in plain English with the source of the answer attached. And what they spotted becomes a task on the job, with a name and a date, rather than a sentence in a group chat.



THE SECOND JOB. THE ROUTE FROM SOMETHING NOTICED ON SITE TO A JOB THAT EXISTS.

Then the review and the referral. Asking gets a firm more reviews, but it does not decide what they say. That was settled at the door, by how the visit went against what the customer expected.

After the van has gone, Onroute Intelligence does two things. The first is the follow-up, which is a rule the firm writes: when the job is completed, or thirty days later at nine in the morning, an email goes to the customer under the firm's name, or a text from the firm's own number, or both. Each is filled in from the job and logged on it as sent by automation, and an email with a blank where the job should have filled it in is held back rather than sent.

The second is a page of the customer's own, reached from the link the firm sent. The handover documents are kept there, the certificates, the manuals and the warranties, so the customer who wants one six months on fetches it themselves. The same page shows them what else the firm sells, and it is where they take the next job on: a service call or a new product, priced from the firm's own list, accepted and paid for on the page. The money goes to the firm's own account under the firm's own name. The job arrives among the firm's own jobs, with the customer's details already on it, not as an email in an inbox.

LIMIT

NO FOLLOW-UP GOES OUT ON ITS OWN. A NEW ACCOUNT HAS NO RULES IN IT. WHAT IS SENT, WHEN, AND TO WHOM, IS THE FIRM'S TO DECIDE AND THE FIRM'S TO WRITE.

And the renewal, which is the version of this that matters most to anyone selling maintenance, service cover or a second technology. The relationship the renewal depends on was formed at the door, by somebody whose name is probably not on the contract.

WHAT YOU HAVE TO CHANGE

None of this is free, and some of it is hard. The brief has to exist before the visit, which means the survey has to be captured properly, which means the customer has to do some of it. Some will not. A business doing this well has a path for the customer who will not photograph their own meter, and does not treat that customer as a failure.

The record has to be made on site, and on the first few jobs that feels slower. It is slower, on those jobs. The time comes back in the evenings and in the weeks that follow, which is not where the person doing it is standing when they decide whether they like it. This is the change most likely to fail, and it fails for a reason that has nothing to do with software: nobody explained where the time went.

Somebody has to own the price list. An itemised quote generated from the firm’s own pricing is only as good as the pricing, and writing that down in one place is the job everyone has been putting off. It belongs to a person, not a system, and it is not a quick one.

The office has to stop being the place information lands. This is a change of habit and, for some people, a change of role. The office manager who knows where every job really is has been the reason the company works, and is now being asked to let the job hold what they were holding.

And the installer has to be trusted with the customer. Not managed at the customer. Giving someone the history, the notes and the authority to say “you’ll want that looking at” is a decision about how far you trust them.

None of this is a software project. The software is what stops it all depending on one person’s memory.

WHAT ONROUTE INTELLIGENCE DOES

Onroute Intelligence is field service management for the trades, worldwide, with country-specific compliance modules built in: jobs, quotes, invoices, payments, scheduling, messaging, job sharing across company lines, and an app that works with no signal. The UK compliance set is built. The United States and other English-speaking country sets are on the roadmap.

Everything in this paper’s argument that the product supports, it supports in one of three ways: it puts the brief in the installer’s hand before they set off, it makes the record as they work, and it keeps what they saw attached to the job afterwards.

WHEN	THE INSTALLER	ONROUTE INTELLIGENCE
BEFORE	READS THE JOB’S REAL BRIEF	JOB NOTES FROM CUSTOMER PHOTOS
BEFORE	KNOWS EVERY PHOTO NEEDED	EACH STEP LISTS ITS EVIDENCE
ON SITE	TYPES TEST RESULTS ONCE	EVERY FORM DRAWS ON THEM
CONTINUED ON SHEET 11.		

WHEN	THE INSTALLER	ONROUTE INTELLIGENCE
ON SITE	SIGNS THE CERTIFICATE	EMAILED BEFORE THE VAN LEAVES
ON SITE	PHOTOGRAPHS THE GRANT EVIDENCE	PROMPTED WHILE THEY ARE THERE
LEAVING	HANDS OVER A FINISHED JOB	HANDOVER PACK ON SIGN-OFF
LEAVING	RECORDS WHAT THEY SPOTTED	A TASK ON THE JOB

WHAT THE INSTALLER DOES, AND WHAT MAKES IT POSSIBLE.

What it does not do is the hard part of “What you have to change”. It will not own the price list, change the office’s habits, or decide how far the installer is trusted with the customer. Those are yours.

We see the same pattern in the businesses that run on Onroute Intelligence. The office is where the job is organised. The door is where the company is judged.

Give the person at the door what they need, and the hours you have already paid for start winning the next job.

This sheet is unsigned. It is signed at onroute.io/whitepapers, where the next paper comes to you when it is issued, with a walk through Onroute Intelligence if you ask for one. Nothing else is sent.

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one email per paper

REFERENCES

- [1] Chargepoint grant evidence requirements. From 1 April 2026 an installer's claim must include a close up photo of the chargepoint, a photo of it showing the model and serial number, a photo of it with the associated parking space, and a photo with a wide field view of the building or space where it was installed. GOV.UK, Changes to electric vehicle chargepoint grant schemes from 1 April 2026, and Electric vehicle chargepoint and infrastructure grant guidance for installers. The residential grants set no claim deadline of their own after installation: the installer guidance (updated 7 July 2026) names none, and the terms say only that a claim or resubmission which misses its deadline is not paid. The one published clock is the Workplace Charging Scheme's, 180 days from the voucher being issued to complete the work and claim, and it runs from the voucher, not the visit.

- [2] The duties on a chargepoint install, each the operator's or the regulation's own, not ours. Network operator: where the installation meets all the notification criteria in Section B of the ENA EVCP & HP Connections Form (v3.3 and v3.4 agree), the installer can connect and must notify the DNO within 28 days of installing the new equipment. Where any criterion is not met, an application goes to the DNO on the same form before the new equipment is connected, and there is no window afterwards. The first criterion is a maximum demand of 60 A (13.8 kVA) per phase for the whole premises, new equipment included, not the charger's rating; a load-limiting device may bring it inside that figure (flow chart v1.3, Note 15). The others: AC output, a known cut-out rating, a metered supply that is not looped, one device only, and no adequacy or safety issue; a heat pump and a chargepoint fitted together also go to an application (Note 12). Building control: under regulation 20(3) of the Building Regulations 2010 the person carrying out the work must, not more than 30 days after the completion of the work, give the occupier a copy of the certificate and give the building control authority notice. The trade calls this the Part P notification, but regulation 20 covers all self-certified work in Schedule 3, in England and Wales. The two windows do not count from the same day: one from installing, the other from completion of the work. A scheme's rule can be tighter than the regulation: NAPIT requires its members to notify it within 21 days, since a later notice means it cannot guarantee the statutory requirement is met (Installer Scheme Rules, NAP/REQ/010 v1.7); NICEIC mirrors the statutory 30. The certificate itself carries no clock: BS 7671 Regulation 644.4 sends the original to the person ordering the work and sets no time for it. The Statement of Compliance is the seller's, not the

installer's: regulation 13 of the Electric Vehicles (Smart Charge Points) Regulations 2021 requires one, signed by the seller, to accompany a charge point when it is sold, and the installer passes on what came with the product. OZEV does not ask for it.

- [3] A solar, battery or heat pump job adds a clock of its own. Under the redeveloped MCS scheme (Installer Operating Requirements Issue 2.0, 8 September 2026) the certificate is raised within 30 calendar days of commissioning; installers not yet moved across by their certification body remain on their legacy standard, and for solar PV that is MIS 3002 Issue 6.0, registration on the MCS Installation Database no later than 10 working days after commissioning. MCS puts the end of that transition at 31 March 2027. A micro-generator is also notified to the operator within 28 days inclusive of the day of commissioning (ENA EREC G98 Issue 2, clause 8.3.1); G98 covers generation and storage, not a chargepoint, which only draws. TrustMark lodgement is required by its Framework Operating Requirements V2.7 (May 2026), which set no timescale, so no clock is drawn for it.

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