

WHITEWATER

Caring about water since 1932

Industry

Water purification plant & service

Number of Sage CRM Users

➤ 9

Challenges

- Required fully-integrated accounting /CRM solution to replace legacy manual systems
- Needed methods to enable field engineers to speed service reports to head office for centralised administration, management and control
- Required method to increase SLAs to better serve customers and those they care for

Solutions

- Sage 50 integrated with Sage CRM
- DB Computer Solutions Consulting Services

Results

- Efficient invoicing – from 4 to 6 weeks to almost instantly
- Fully centralised data management
- Remote field engineering reporting – via CRM-enabled Tablets
- Delivers deep management reporting - helping customers to root out problems before they happen
- Drives simplified field engineer management and scheduling
- Improves critical SLAs to ensure delivery of vital purified water for end-customers
- High ROI and quick break-even – due to efficiency and productivity increases
- Enables high SLAs – to help end-customers better deliver vital services

WHITEWATER

INTEGRATED SAGE 50 & SAGE CRM DRIVE VITAL FIELD SERVICE SLAs

As one of the leading suppliers of water purification plant in Ireland, Whitewater supplies purified water for Medical, Potable, and General Industry sectors throughout the country. Within the Medical sector, Whitewater solutions deliver state-of-the-art ultrapure water plant for critical patient care including renal dialysis, endoscopy, laboratory, and similar purposes.

Whitewater field engineers, and the support they provide to keep purification plant running efficiently, are therefore critical to the end-customers they serve, and reinforce the company's reputation for service excellence.

CHALLENGES

Until recently, Whitewater employed a combination of manual systems and legacy IT solutions to manage field service personnel and expedite delivery of vital maintenance, support, and administration for water purification plant across the country. However, these processes faced a number of challenges.

Call-out schedules and rosters were administered manually. This meant the company might not use Whitewater field engineer human resources as productively as possible. Additionally, when Whitewater field engineers conducted routine or emergency services, they relied on a manual, triplicate, service report book. Engineers manually wrote in vital information including customer name, location, date, service provided, and any parts or other disposable items used during a call out.

This paperwork was critically important. It was used not only to prove work completed but information contained in it was used by Whitewater back-office administrators to bill-back the customer. This process had a number of drawbacks.

1. Field Engineers, still on the road, might not be able to deliver manual reports back to head office for 2 to 4 weeks after any visit.
2. Once receiving the paperwork, Whitewater back-office personnel had a daunting task still in front of them: first they had to account for all service time and disposable items used to accurately invoice customers. Then they had to generate and send a Quote to the customer. After receiving the Quote (which occurred weeks after the work was completed) the customer issued an appropriate PO. Only then could Whitewater invoice the customer for payment.

This awkward process was both time consuming and potentially inaccurate. In the event a customer queried a particular service call, occasionally illegible field engineer writing would have to be re-typed and sent out. Often, numerous phone calls would be made to engineers and customers to resolve queries.

The manual process also involved re-keying vital accounting data, which could be prone to error. All disposables used might not be charged back, yielding possible losses in revenues. The system did not provide timely aggregate reporting which would allow Whitewater and its customers to easily track maintenance – or possible problems – with specific plant. And it meant that Whitewater might inadvertently miss critical customer SLAs.

To resolve these challenges Whitewater first sought to upgrade its existing accounting / CRM solution. Whitewater wanted an almost ERP-like platform that would enable field engineers to use mobile Tablets remotely on-site to replace the existing manual system. Unfortunately, Whitewater quickly discovered that such an upgrade was impossible.

“Invoicing our customers could take anywhere between 4 to 6 weeks, or more, after the service call-out,” says Sharon Finnegan, Whitewater Credit Manager. “We wanted something much more timely and efficient but the legacy system couldn’t handle Tablets and we discovered they were unable to perform an upgrade. We recognised that to increase productivity and efficiency, and deliver higher service levels, we needed to start from a clean sheet.”

“Due to the new efficiencies delivered by Sage 50 and Sage CRM, many back-office personnel and field engineers are saving at least 4 hours every day because they don’t have to deal with manual systems. That time is being used for more critical tasks.”

Sharon Finnegan
Credit Manager, Whitewater

THE SOLUTION

To achieve its objectives, Whitewater reached out to DB Computer Solutions, one of Ireland’s most experienced Sage Business Partners. DB Computer Solutions’ consultants first gained a complete understanding of Whitewater’s challenges. It then recommended replacing its legacy systems with Sage 50 Accounting software fully integrated with Sage CRM, re-engineered for highly flexible and agile Whitewater requirements.

Having deployed the new solution, individual instances of Sage CRM were installed on new Tablets. Whitewater-specific field report templates were also designed and deployed. Tablets were then distributed to designated staff.

Today, Whitewater field engineers call up customer-centric reports on Sage CRM-enabled Tablets at the touch of a button. Seamless remote service workflows have fully transformed Whitewater customer service reporting processes.

Instant Integrated Remote Data Reporting

When Whitewater field engineers visit a customer, they easily record all relevant data onto Tablets and into customer-specific reporting templates. Data includes time of arrival, time of departure and total time spent on site, customer contact details, type of service delivered (for example: pre-scheduled maintenance, warranty, or emergency repair), the identification of specific plant worked on and the details of the service, and any disposables or other parts used.

When the call-out is complete, the customer digitally signs the report. All data is then transmitted via Internet connection to Whitewater head office, where it is

instantly captured by company administrators. There, they can easily accrue all billable labour and disposable costs, migrate that data to Sage 50 as part of the invoicing process, and fully account for field engineering time.

“The new Sage system has many benefits,” explains Sharon, “including the fact we can now invoice almost instantly. This means our customers are no longer confused by receiving an invoice 6 weeks or more after a service call and trying to remember details. I no longer have to make multiple calls to customers or engineers to clear up misunderstanding, which means none of us have to endure that frustration anymore.

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Deep Insight for Customer Reporting

Whitewater customers also benefit substantially from the new Sage solution:

Today, data received as part of the call-out process is fully captured. Whitewater can run customer-specific reports, drilling down into specific pieces of plant on-site and the nature of any call-out. With these reports, both Whitewater and its customers are advised of actions required to keep plant up and running.

“Many of our purification plants are very, very important to our hospital customers and the patients they serve. It is critical to keep them up and running,” Sharon says. “With our new reporting, we can determine how many times a customer has received a call-out, what we did and to what, and if specific plant might require replacement or other actions. This is a critical KPI and one we don’t treat lightly.

“Sage CRM not only helps us to achieve critical SLAs but it enables Whitewater to act as a guardian for our customers: with Sage CRM we’re enabled to keep a careful eye on plant resources which are vital to these customers. For that reason, Sage CRM is now a strategic tool, helping us to become an even better partner with our customers.”

Additionally, and because all notes are digitised, Whitewater can quickly provide clear information to customers should they require it.

“If a customer wants some information I don’t have to find and dig out paperwork anymore. Instead, all we have to do is send it,” Sharon says. “We no longer have to deal with illegible handwritten notes or misplaced reports. All information is digitised and captured centrally.”

Sharon also explains that data regarding disposables used during call-outs can help their customers save money. “We can analyse the types of disposables used, when they are used, and how many are used. We can help customers to cut costs by advising them to order disposables in bulk, if so warranted.”

Simplified Field Engineer Management

The integrated Sage solution and its deep reporting also empower Whitewater to more efficiently manage scarce field service engineer resources. Whitewater managers can easily determine human resource availability: who is already scheduled for call-out, who is on holidays, who is available, and their location. Managers then use Sage CRM to maximise human resource allocation to better serve its nationwide customers.

Too, new or pre-scheduled assignments are easily communicated to specific field engineers via their Tablets.

“Today, scheduling is simplified and much more efficient,” Sharon says. “Everyone knows what they’re doing. We know when maintenance is due, and what our field service resources are. It’s easy to swop engineers if someone calls in sick to ensure coverage. In short, it helps us to ensure high SLAs for our customers.”

Whitewater Managing Director Liz Nagle adds: “What we were looking for, and received, was a customer relationship lifecycle management solution to manage the company’s Service, Sales, and Marketing within a single system, integrating our daily routines and supporting our processes. The system now eliminates considerable manual work, keeping all our customer communications in one place.

“For critical areas of our business (the integrated Sage solution) keeps everyone focused on the activities that drive leads to closure. As a sales management tool, CRM is crucial in prospective customer tracking: from lead generation and follow through to customer communications, and reminders to our sales teams to ensure we do not miss any opportunities.”

Highly Recommends

Sharon highly recommends DB Computer Solutions and its expertise to other companies. “DB Computer Solutions listened and responded with a solution that does what they told us it would do. We save so much time that our new solution literally pays for itself.

“Since deploying Sage 50 with Sage CRM we have doubled what we can do with our time. Our customers save time, money, and frustration because our important information is now digitised, centralised and quickly available. Today, due to new reporting features, we can forecast what our customers might have to spend on plant next year, enabling them to develop accurate budgets.

“Most importantly, and particularly for our hospital customers, we can meet and exceed SLAs, ensuring that vitally pure water is there to help maintain the healthcare of the patients they serve.”

CONTACT US

To learn more about DB Computer Solutions and our wide range of capabilities, please contact us:

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