

# Tasman Oil Tools



## Oilfield Equipment Company Drills Into Data For a Profitable Return

Tasman Oil Tools is an oilfield rental and service company with operations in Western Australia, Northern Territory and Victoria. Since inception in 1980 the company has developed an intimate knowledge of the requirements of the Australasian oil and gas industry both in terms of equipment and accompanying services. Its broad range of rental equipment, support products and services is relied on for onshore and offshore oil and gas drilling, coal bed methane and geothermal drilling operations.

### Keeping track of inventory

Approximately 80 percent of Tasman Oil Tool's revenue comes from its rental business. This means that knowing where equipment is, whether it's available to rent out and its condition, is critical when trying to maximise revenue. Yet six years ago, when Carla Morris-Luck arrived at Tasman Oil Tools to take on the role of Operations Manager, this information was hard to find.

"The systems we had in place were massively inadequate. We were tracking tool rentals to clients on spreadsheets," she explains. "We had a small business accounting package and custom-built service and asset programs. The accounting package did what was needed but its security and reporting were poor. The real issue, however, was integration. None of the systems talked to each other so whenever we acquired a new asset it had to be manually added to each system."

To complicate matters Western Australia was in the midst of a major resources boom. Demand for rental equipment was sky-rocketing and Carla admits that with the extra workload, it was tough just to fulfil customer requirements. This happened through sheer hard work and the dedication of their staff. Her hopes for a systems revamp were put on hold for almost three years as the company focused all its attention on servicing clients & strengthening the financials.

### Time to act

By 2009 the market had settled slightly. It was obvious another boom was not far away but, for the moment, some of the pressure was off. For Tasman Oil Tools' management it was a time for reflection and planning.



### At a glance

#### Business Objective

Replace multiple inadequate business systems with a single, integrated & robust solution that would help to track equipment, provide dramatically improved business reporting and support anticipated business growth.

#### Solution

Microsoft Dynamics GP  
Wennsoft Asset Management  
Wennsoft Service Management

#### Business Benefits

- Remove duplication of data entry
- Faster, more accurate customer service due to visibility into inventory
- Scalability for growth
- Enhanced security

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The company revisited the idea of upgrading its computer systems. "We knew we couldn't achieve maximum revenue through another boom without streamlining the way we worked," Carla notes. At the same time, management also considered capitalising on its success by selling the business. Carla says, "It became apparent during the process that our reporting capabilities were inadequate for presenting detailed information to prospective buyers. Everything had to be manually generated by piecing together information from different systems, which took substantial time – time we didn't have!"

These two drivers made it clear: a new, consolidated software system was no longer a "nice to have." It was essential.

It was around this time that Carla received an invitation to a Microsoft Dynamics GP financial software presentation from Professional Advantage. Here she was also introduced to Wennsoft Asset Management and Wennsoft Services and Support, two value-add software packages that extend the core Microsoft functionality with specific in-depth capabilities for fleet and asset management, and service requirements.

"Asset management was always a big part of the scoping, right from the very beginning. We need to track detailed attribute information, status, labour costs & external costs associated with servicing and repairing of tools, as well as income generated. We were impressed by the reporting, the ability to drill down into information easily, and the way you could click-through from one thing to another. We also liked its ability to hold a lot of information about each asset," she says.

Rather than leap into the decision Carla engaged an independent consultant to help evaluate the project. A number of software packages were briefly considered but none met Tasman Oil Tools' requirements as well as the combined Professional Advantage/Microsoft Dynamics GP/Wennsoft solution. "It offered the best fit with the least customisation," Carla says. "We didn't want a custom built system because we'd previously had one and we knew the difficulties this

could cause with service and support. We needed a help desk where there would always be someone we could speak to. And we didn't want to be locked in to one vendor."

Confident that Professional Advantage had the experience, resources and local support that Tasman Oil Tools needed, the project was given the go-ahead and deployment soon began.

## Uploading 7,000 assets

With around 7,000 assets – each of which can have up to 20 attributes – the process of uploading data was never going to be easy. Carla says, "It was a significant quantity of data that had to be uploaded and preparing the spreadsheets was the biggest job of all. We had a team of three internal but extraordinarily dedicated staff working on it (which included then Financial Controller Bernarda Link & then Operations Coordinator Ruth Warren) but we all still had our day-to-day jobs and had to keep the business running. It was a huge effort."

To ease the load Tasman Oil Tools' retained their independent consultant to help manage the Professional Advantage relationship and keep the project timing on track. "For us it was an insurance policy. She was someone who had done this before and knew the bumps in the road," Carla explains.

## A busy time

During this time an agreement to sell the company was reached and the sale was scheduled to go through on 31 July 2010. Original plans to go live on 1 July 2010 in line with the new financial year had to be postponed due to workload relating to the sale transaction. A new go live date of 1 August would enable the new owners to begin their operations with a clean slate. However, the date also put pressure on the implementation. For Carla, Ruth & Bernarda, it was a frantic, exhausting but successful period that saw Tasman Oil Tools switch to its new systems right on time.

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Following the exhaustion of the sale process & months of data preparation for GP, Carla made the difficult but necessary decision to take leave and be away during go-live. She attributes her ability to do this on her two other project team members, Bernarda and Ruth. However for the first couple of weeks, the company retained a Professional Advantage consultant on site to provide support as and when required. "That was a very good decision on our part. It meant the girls had someone here to help them and it helped to make everyone feel more positive about the change to a new system, particularly in my absence" Carla says.

As with any project there were initial challenges. It took time for staff to become familiar with the change in user interface and increased levels of security. A problem in the software caused delays when generating and printing invoices with hundreds of tools. However, with the help of Professional Advantage and Wennsoft, the majority of these challenges were soon fixed.

### Today and tomorrow

Today around 15 staff use the software on a daily basis. The quality and scope of financial reporting have increased dramatically. Data no longer has to be entered into systems multiple times. The software is proving to be scalable, ready to cope with whatever growth the next resources boom brings.

Microsoft Dynamics GP SmartLists are being used to enhance customer service by compiling client and equipment information on a single screen. "When a client calls, we can quickly search the database and find everything that relates to that client. Before this process was so long winded," Carla says. "The tool tracking is also excellent, as is the attribute information."

Another benefit has been the change in IT support arrangements. "What used to happen with six different systems is that people would come to me and I would have to work out the answers to their questions. Now I have the option to send them to another avenue – the Professional Advantage helpdesk," she notes. This has allowed Carla to spend more time focusing on business management, and operational growth.

*"The system has fundamentally improved our business. We've dramatically reduced the time it takes for sales staff to find suitable equipment and we no longer have staff going into the workshop manually searching for equipment for clients. We're seeing huge efficiency gains in our ability to handle more enquiries and to get back to people much faster," Carla adds.*

"We're still fine-tuning some areas and there's a lot that we're still not using yet. Finding time to explore the software is the main challenge. We are now tackling quality assurance certification and this will give us the opportunity to delve further into Microsoft Dynamics GP. The system has definitely added a lot of value to our business. We now have the ability to deploy another branch or add another 5,000 tools to our fleet with relative ease. It's certainly been a successful albeit challenging project & one I am immensely proud of" Carla smiles.

For more information

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