Envar Case Study

Envar Gets Proactive About Customer Service With WennSoft and Professional Advantage

Envar Group is a highly-regarded air conditioning specialist. Through its three wholly-owned subsidiary companies the group designs, installs, services and fabricates air conditioning equipment for clients throughout Australia. Envar has a solid reputation for its management of projects on major construction sites, outfitting of office blocks and for its sympathetic yet practical approach when dealing with heritage buildings.

Envar's head office is based in Western Australia and they maintain an office in New South Wales. The company employs approximately 100 people.

Managing a growing service business

One of the most high-profile aspects of Envar's business is its service and maintenance company. Clients contract Envar to provide ad hoc services and ongoing maintenance to ensure the efficient running of their air conditioning systems. By 2010, this meant that Envar's technicians were attending and inspecting approximately 200 client sites each and every month.

However, although the group was equipped with accounting and job costing software packages, there was no system to support the critical areas of services scheduling and reporting. Staff largely relied on a manual paper trail to record their work, and management had no ability to readily identify what percentage of the month's service calls had been completed at a given time. Nor could they identify crucial staffing data such as sick and annual leave statistics.

Envar management knew that with better information the services company would be able to provide a more consistent and proactive customer service while increasing visibility into business operations. They would be able to collate and compare service call data, client costs and provide alerts to clients when their systems were no longer operating as reliably or cost effectively as they should be.

During the latter half of 2010 the company searched for a possible software solution. Administration Manager, Deirdre Bailey says, "We looked at a few things. Some were strong on the scheduling side or the tracking side but they couldn't integrate with our accounting system." Unable to find what they were after, Envar decided to broaden the search and to seek an integrated job costing, service management and financial software solution.

At a glance

Business Objective

To strengthen reporting and achieve greater accountability within the organisation's service business.

Solution

- Microsoft Dynamics GP
- WennSoft Job Cost and Service Management modules

Business Benefits

- Complete visibility into service status; including completed jobs and outstanding commitments.

- Graphical scheduling of technician appointments means that everyone knows where each technician should be at any given time

- Faster, more accurate financial reporting

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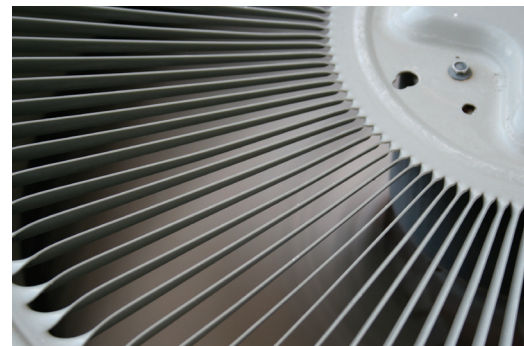
"We looked at one popular product which was good but it wasn't particularly user friendly and the reports seemed to be a bit old fashioned," Bailey comments. "We would have had to do a lot of editing to get a report out that looked half decent. Also it was very expensive for what it could do."

"Then our Service Manager came across Microsoft Dynamics GP. It had the strong reporting we were after and it integrated with WennSoft, which delivered the service and job costing functionality," she continues.

Microsoft Gold partner, Professional Advantage, was invited to Envar's office to demonstrate the solution.

"They were very switched on. They knew everything about the software and could answer all our questions. That gave us confidence in the system."

The fact that Professional Advantage had a local presence in Western Australia was an additional advantage. "If I have to deal with an east coast company and I have a support question at 3.30pm in the afternoon, because of the time difference, it can't get answered until the next day. So it was great with Professional Advantage to have someone local. We know that if we have a major problem, we can say 'Please come and see me'. When you're dealing with the eastern states, that's just not feasible."

Confident that they'd found the right solution and the right partner, Envar committed to Microsoft GP, WennSoft and Professional Advantage in December 2010.

A busy implementation schedule

Before implementation began, the Professional Advantage Project Manager sat down with Bailey and other Envar managers to explain the process. "He was very thorough, talking us through time scales and critical paths. He also helped us to understand the amount of preparatory work that we would have to do. For example, before we could go live we had to set up all the debtors ledgers, so every debtor had to be transferred from the old system to the new. It was the same with creditors. All open jobs that were moving over from the old system to the new system had to be created and the information had to be accurate," Bailey says.

Over a four to five month period, Envar's administration team entered all the necessary data into spreadsheets which were then sent to Professional Advantage for uploading into Microsoft Dynamics GP. "We had a half a dozen accounting and administration staff share the work around over a couple of months. It was a massive job, bearing in mind that the group is organised into three companies and the staff still had to find time for their day-to-day jobs," she adds.

"Professional Advantage kept tight management of the project, making sure we stuck to the schedule."

Once the data had been entered Envar began training staff. "We set up a training centre in the boardroom and spent about three to four weeks going over the system with staff. When this was completed we followed up with testing. Every day staff would spend a couple of hours entering purchase orders, jobs and so on. Whatever tasks they would be doing once the system went live, they had to test themselves in advance to make sure that everything printed out properly and to make sure what they were entering went into the correct general ledger account. Whenever problems were identified they were fixed straight away," Bailey explains. It was an approach that not only gave the combined Dynamics GP/WennSoft solution a thorough workout, but it also helped to reinforce the training of the previous weeks.

"When it came to go live day, there were still some teething problems but everyone knew what had to happen. There were no 'how do you do this?' questions, which made the process so much easier," Bailey admits.

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Graphical scheduling

One of the biggest benefits arising from the new system has been the introduction of WennSoft's Graphical Schedule Board. The Board displays information such as technician appointments and status updates including outstanding service and maintenance commitments. The tool is a huge advantage when managing multiple technicians and is helping to streamline management tasks and bring the oversight that Envar management had been hoping for.

"Previously it was extremely hard to see what maintenance had been carried out for the month. Now we can schedule the work and we can easily identify which contracts have been attended to, which ones haven't and which ones are semi-completed. Six months ago if you'd asked the service controller where a technician was she'd have had no idea. Now we know where all our technicians are from one hour to the next. Within four months we've seen a definite improvement in our servicing department and we're still not using the Graphical Schedule Board to its full capacity," Bailey acknowledges.

Bailey points out that this extra accountability has brought an unintended benefit: the data provides an audit trail of staff commitments that will be invaluable with the introduction of occupational health and safety harmonisation in early 2012.

Enhanced reporting

Reporting has also dramatically improved. "We can get so much out of the system," Bailey says. "What we really love is Microsoft Dynamics' SmartList. We prepare a lot of different reports for all the areas of our business and with SmartList, managers can edit the reports to suit their needs, then save them. Every time they return to that report, it updates itself."

The ability to drill down through reports for more in-depth information is proving to be a winner, particularly with engineering and project managers who need fine detail in their data.

Bailey believes the ease of reporting is also delivering significant time savings for staff. Efficiency of monthly invoicing has increased noticeably, with the process now achievable with the push of a button. "With our previous program a lot of the Supervisors and Project Managers would ask one of the staff to print or access a report for them. Now they can do it themselves, even remotely."

The future

Four months down the track, Bailey says, "We haven't even touched the surface of what's possible with Microsoft Dynamics GP and WennSoft. We're still exploring what we've got. Once we become more familiar with the system, we may start to look at add-ons. One thing that could be of use is the idea of a client portal but that will be some time down the track. Right now the system is doing everything we need."

About Professional Advantage

Professional Advantage focuses on providing technology and services that enable high-performance workplaces and organisations. Professional Advantage was established in 1989 and today employs more than 230 people in Sydney, Melbourne, Brisbane, Perth, London and Fargo, USA. The company is the largest provider of leading brand global business management systems, such as financial management, ERP, CRM, retail, business intelligence, business process management and portal solutions to midsize organisations in Australia, supporting over 800 clients nationally. Its multi-product offering is complemented by its development, systems integration, consulting, training, and support services. Professional Advantage is the winner of many business and vendor awards and is a member of the Microsoft President's Club 2011.

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