

Microsoft Dynamics 365: Field Service

Evorio delivers intelligent field service management for Florigo.

The Challenge

Florigo wanted to identify a single internal system that could be used by all divisions of the business. Up to that point Florigo was using different systems for sales and for service management which led to teams having incomplete views of customer interactions. As a result, opportunities that were being identified by the service team could not be easily shared with the sales team, and any customer issues identified by the sales team could not be easily reported to the service team. Additionally, any service work that required invoicing to the customer involved the slow manual inputting of the job details before the customer could be billed.

A further challenge for Florigo was how they could more efficiently schedule service jobs. Improved scheduling would allow engineers to reduce the time spent travelling which would in turn allow them to address customer service jobs more rapidly. Their current systems could not provide the data and intelligence required to identify areas in which the team could work more efficiently and also where wider opportunities for improving customer service might lie.

Finally, by using more than one system, Florigo staff had to learn different interfaces and different processes in order to complete their daily tasks. The current software was not sufficiently intuitive, which led to time being lost gaining access to, and interpreting, customer data.

FLORIGO



Florigo is a leading manufacturer and supplier of frying units to the catering industry, including fish and chip shops, restaurants and entertainment venues. The business, established for over 50 years is based in the Midlands and has an engineering team spread across the UK servicing over 500 customers.

In order to support Florigo's growing customer base, the business needed an internal system that could track their end-to-end customer interactions, from sales, to service, through to accounts and management reporting.

"Evorio were professional from the outset. We met with several other suppliers and none gave us the feeling of confidence that Evorio did. They continue to provide us with very good support. They're very good at what they do."

Andrew Smith, Operations Manager.

The Solution

Florigo approached Evorio to implement the Microsoft Dynamics 365 solution. Dynamics 365 is a fully integrated system that all divisions within Florigo can use, from the sales team to accounts to service and the field engineers, through to senior management for reporting.

Evorio worked with Florigo to advise on, install and implement Dynamics 365 so that all their customer processes can be managed, actioned, and reported within a single system. The key uses and benefits of Evorio's implementation of Dynamics 365 for Florigo are:

- **Powerful scheduling of service jobs:** Using a simple drag-and-drop interface, the central Florigo team can see all jobs that are coming in from customers or from the sales team, allocate those jobs to engineers based on their location and optimise the scheduling of jobs so they can be efficiently grouped. At the same time, the team can easily see current unallocated jobs and assign them to gaps in engineers' schedules so customer wait times can be minimised.
- **Mobile connected engineers:** All the engineers use the Dynamics 365 compatible mobile app, Resco, to record their actions, such as traveling to a job, job completions and customer signatures, as well as make customer notes and recording tasks completed. Their progress from job to job is then tracked via the app and mapped centrally.
- **Intelligent stock management:** The engineers use Dynamics 365 to record each part that they use from their van. This allows the central team to manage stock reordering and efficiently schedule when the engineer is required to return to head office to replenish their stock.
- **Integrated accounts and invoicing:** Dynamics 365 is used by the accounts team who can raise service job invoices that are pre-populated with the engineers' notes and the parts used, and then seamlessly issue the invoice to the customer, this is then sent automatically to their Sage accountancy package.
- **Data analysis to identify efficiencies:** Using Dynamics 365, Florigo are able to run reports on the service team's key performance indicators, including:
 - **First-fix rates of engineers.** Are enough of the jobs being fixed during the engineers' first visits and what barriers to first-fix can be addressed?
 - **Travel versus labour.** Are any engineers spending too much time travelling to jobs compared to time spent on-site and can their jobs be geographically grouped more efficiently?
 - **Most frequently used parts.** Are some parts being installed more than others and should their stock levels on vans be changed?
 - **Personalised dashboards.** Each staff member can run reports that are relevant to their needs and save those reports to their personalised dashboards, updated in real time.

"The system is so well integrated you can literally think of any report you like and run it. It allows us to instantly dig into almost any aspect of our business at any time."

Steve Brooks, Financial Controller.

The Outcome

By using Evorio to implement Dynamics 365, Florigo now has a central system that all team members can use to make their roles easier, quicker and more efficient. The sales team record customer issues which are seamlessly passed to the service team who can efficiently schedule an on-site visit. Dynamics 365's reporting tools then allow Florigo to identify areas in which they can be more efficient and the management team can easily track business performance in real time. The key benefits Florigo has experienced include:

- More effective sales visits, with routes pre-planned, customer history immediately available, and the ability to communicate with the back office at the touch of a button.
- More efficient scheduling of service jobs with less time spent by engineers travelling between jobs, and customer issues dealt with more rapidly.
- Customer opportunities and issues can now be identified and instantly allocated to the correct division for action.
- The mobile-connected engineering team can complete all their job admin on the road, from their travel schedule, to parts used, to customer notes and customer sign off.
- More accurate stock control, stock reordering and van replenishment.
- Seamlessly integrated, pre-populated customer invoicing.
- Intelligent and real-time reporting for each division of the business to monitor key performance indicators such as engineer performance and stock reliability.
- A system that, being a Microsoft product, staff already know how to use. Time is no longer wasted learning how to complete tasks, and actions within the system are intuitive and quick. Data can then be exported as required and is fully compatible with other Microsoft products.



"We looked at several systems before choosing Dynamics 365. Dynamics had everything we were looking for and seemed like an obvious choice from the beginning. Being a Microsoft product, you know you're going to get the support, you know the products will constantly evolve and you know it's going to be here this year, next year and many years after."

Andrew Smith, Operations Manager.