

WAIBEL UNIFIES THEIR HVAC SERVICES WITH FIELDPOINT'S FIELD SERVICE SOFTWARE



The Company

Waibel Energy Systems, a mechanical HVAC services company operating out of Dayton, Ohio, has been providing quality HVAC installation and repair services for over 50 years with the goal to deliver the best equipment, support and service possible. Waibel services existing equipment through service contracts and preventative maintenance agreements, provides energy management and building automation solutions, as well as develops, implements, installs and supports HVAC and advanced building systems.

Challenges

- Construction projects and regular service were on separate systems, making it difficult to schedule shared resources and track revenue between two departments.
- Manual scheduling with whiteboards and outlook was slow and made it challenging to get correct information.
- Lacked ability for technicians to access work orders and capture time in the field, slowing down billing times.

Results

- Unified platform brought services and projects together to better share resources.
- Seamless integration with Microsoft Dynamics GP made sharing information easier and billing faster.
- Improve technician productivity by increasing applied hours by utilizing one interface and mobile app.
- Information readily available, smoothing out operations for dispatchers and office administrators.
- Technicians enter time and capture signatures on mobile device, shortening the billing cycle.
- Greater ability to report on operations with readily available information and data.



WAIBEL
ENERGY SYSTEMS

Headquarters

Dayton, Ohio

Industry

HVAC

Financial System in Use

Microsoft GP

Fieldpoint Users

60

Fieldpoint Applications

Work Orders, Mobile App, Microsoft GP Integration, Contract Module, Preventative Maintenance Scheduling, Project Module



A DISCONNECT BETWEEN FIELD SERVICE AND PROJECT MANAGEMENT

Challenge

With over 200 contracts, 200 projects, and over 250 open calls at any given time across 50 field resources, Waibel has their hands on many different unique challenges that has made them a leading choice for HVAC and energy systems. But between all their offered services was a lack of unity and collaboration between their various departments, who would pull from the same pool of technicians and resources.

“We perform services on existing equipment as well as construction project work, and those two worlds were written separately and handled separately in the previous system,” said Mike Cooper, Director of Information Technology for Waibel. “So, it made it hard to show resources or track revenue, and hard to unify the way we’re trying to operate our business.”

Dispatching their technicians was done manually through whiteboards and Outlook, requests for parts had to be phoned in, time was inputted differently between service calls and construction projects, and there was limited visibility across the business.

“It slowed things down and it made it hard for people to get an eye on what was in front of us,” said Cooper. “If you weren’t talking to the right person you wouldn’t be able to get the information you were looking for. When we do our construction projects, those didn’t play nice with our services organization and we have technicians that go back and forth between those organizations.”



ESTABLISHING SYNERGY AND CONSISTENCY AMONGST THEIR SERVICE DEPARTMENTS

Solution

When a decision was made to turn to Fieldpoint's field service software, unifying their service and construction departments and integrating with various systems, such as Microsoft Dynamics GP, was of utmost importance to Cooper and Waibel, as the company's vision in the future is to utilize additional software that can be integrated with Fieldpoint for greater business potential.

"I wanted to make sure it was something that would play nice with most of our systems that we envision ourselves utilizing as we go forward," said Cooper. "The integration between Fieldpoint and Microsoft GP we are starting to make more and more use of, and the potential to integrate the two was important for us."

With Fieldpoint, Waibel has been able to work off a unified platform to establish synergy between departments that share resources and technicians. They are now able to operate off a single piece of software where they can schedule resources between different areas of the business, track revenue and work off insightful reports. With their previous software, each side of the business was separated into its own system, so there was no visualization between the two departments. One side of the organization didn't know what the other side was doing.

"When we do our construction projects, those didn't play nice with our services organization," said Cooper, "and we have technicians that go back and forth between those organizations. The way they input their time is different. The way you feed your information about what you're supposed to be doing is different. Now we've been able to be a lot more consistent in how we're handling all of our operations."



Results

Waibel now has a direct line of communication between all their departments, and have merged operations onto a single unified platform with Fieldpoint's field service software.

"It's one of the big pluses for us with the merge, in that we're able to operate all out of a single piece of software and we can schedule resources across those modules and report off that pretty easily," said Cooper. "It's less confusing for our field technicians. They don't have to worry about learning multiple interfaces to enter their time. They do what they're supposed to do and they can focus more on getting the job done with less paperwork."

Technicians are utilizing the Fieldpoint mobile app to access work order information, making their tasks more readily available to them in the field. Technicians are also using the mobile app to capture their time for more accurate billing, while capturing customer signatures at the completion of a job is reducing the time it takes for Waibel to generate invoices and get them back to the customer.

"It speeds up our ability to bill the customer" said Cooper. "The technicians enter the time and get a signature as they finish the work that they're involved with. It gives us a lot more flexibility to generate our invoices and get them to our customers quickly. That has shortened pretty dramatically for us."

Less time is now being spent in the office troubleshooting and technicians are more focused on the work they are supposed to be doing. From operations administrators and dispatchers, Cooper said they are feeling overall effects of Fieldpoint's field service software, as the business is running smoothly, and information is readily available at their fingertips, whether they are dispatching for a contractual service call, or planning resources for a project.

"Internally it has smoothed out our operation," said Cooper. "It allows us to work in a more unified matter. It allows us to report on the information around our operation more consistently and more reliably than we were able to do before."
