


 CASE STUDY

Service Technology Helps Oil & Gas Services Firm Scale for Growth



CUSTOMER QUICK FACTS

INDUSTRY:

Oil & Gas

SIZE:

140 employees/ 38 technicians

HEADQUARTERS:

Alberta, Canada

WEBSITE:

www.tundrasolutions.ca

SYSTEMS IN USE:

- ServiceMax Suite
- ServiceMax Mobile for iPad
- CRM: Salesforce
- ERP: SAP

Tundra Process Solutions Ltd. was growing and needed to scale to meet this demand. But they knew that hiring more techs wasn't the only answer. Tundra needed to update and streamline their service operations to make each technician more efficient and effective, while reducing the amount of overhead and non-billable time that was a drain on both employee job satisfaction and profitability.

The pivotal moment came when ...

- Cash flow was painfully slow -- most customers did not receive an invoice until 4-6 weeks after work was completed
- An inability to track metrics meant limited visibility into inefficiencies and process bottlenecks
- Non-billable time was increasing, with technicians making frequent trips to the office to drop off paperwork or seek knowledge regarding difficult repairs

Applying technology led to...

- Automated billing processes that were faster, more accurate, and no longer required a technician to drive into the office to hand-deliver paper work orders
- Accurate data on service operations metrics like first time fix rates and utilization rates, in easy to understand dashboards and reports
- The ability, via ServiceMax Mobile for iPad, to provide real-time, in the field access to knowledge and peer support when a repair or install hits unexpected difficulties

The road to success is delivering...

Improved cash flow, with a 75% reduction in the time from service delivery to invoice

Measurable first time fix rates, with a significant improvement seen already

A 25% reduction in non-billable time

CHALLENGE

Originally founded as Tundra Controls Ltd., Tundra Process Solutions Ltd. has been an instrumentation and control specialist in the oil & gas industry since 1999. Tundra Solutions has grown into a full solution provider to their manufacturing partners, and also provides in-house custom engineered solutions. Tundra service technicians work on these instruments in extremely remote locations throughout Alberta, Canada, making visits to the “office” time consuming and costly.

Tundra Solutions was experiencing growth and had large goals in place for their sales & service teams. Their sales teams had seen success using Salesforce, and Tundra knew that their services teams needed the right tools in place to achieve their targets as well. They considered customizing Salesforce to extend to the service team, but were concerned that this route might prove both costly and time consuming, and that they might quickly “outgrow” a custom solution. Luckily they found ServiceMax, with a field-ready, end-to-end field service solution 100% native to the Salesforce platform. This was the solution that would deliver the foundation needed to support the future growth at Tundra for years to come.

The first order of business would be to tackle the lagging cash flow that was stunting Tundra’s growth. Technicians were in the field using paper work orders, and would often not return to the office until 3 weeks later. It took an additional week to process the paperwork resulting in a 4-6 week lag after the work was completed before a customer would even receive an invoice.

Another issue holding them back was a lack in ability to track key operational metrics. Tundra Solutions didn’t have visibility into how long technicians were spending on non-billable hours, and had no way to pull up a report to see average billable time. There was a feeling that things were inefficient, but no data meant it was difficult to identify potential solutions or to track whether those solutions would have the intended results. Access to reporting would provide the means to identify process bottlenecks.

SOLUTION

Tundra Solutions turned to ServiceMax to help increase their field service efficiency and provide a foundation for growth. “Our sales organization was already using Salesforce and since ServiceMax is built on the Salesforce1 platform it was very familiar and easy to use”, said Derek Bairstow, Manager of Information Services.

“For my role in IT, I look at how difficult a solution will be to maintain and customize, how much will I have to rely on support, and what is the real overall cost of a system. Going with ServiceMax was a no-brainer. Tundra can do 95% of the administration work ourselves. It’s not cumbersome and it takes us a minute to do the work. For the other 5%, I turn to the ServiceMax support staff for help,” said Mr. Bairstow.

Tundra Solutions implemented ServiceMax mostly in house with some help from Traction On Demand, their Salesforce consultant. Initially there was an expectation that technicians

would have some trepidation about using an iPad, however, they adapted very quickly. “Our technicians know ServiceMax on their iPad helps to get their job done faster,” said Mr. Bairstow.

Before using ServiceMax, when technicians needed help on a difficult fix while out in the field, they had to drive back into the office to receive guidance. Now with technicians using iPads either online or offline in remote locations, they rarely have to come into the office. “Service guys don’t want to be in the office doing paperwork, they want to be in the field fixing equipment.”

“ServiceMax shows our customers we can play in the Enterprise world even though we are not an Enterprise-sized company. It’s one of the things that make our customers want to keep doing business with us.”

*Derek Bairstow, Manager of Information Services
Tundra Process Solutions*

RESULTS

ServiceMax has helped Tundra scale their current operations for growth, and even helps them ramp up new technicians as they expand their team. A clear, step-by-step process guides even inexperienced techs through the work order, and the connectivity to other technicians and knowledge ensures there is a whole community the technician can rely upon when troubleshooting an issue. **“The biggest result for us has been training.** Before ServiceMax, we had a long learning curve and it took a while to get techs up to speed on our processes. **Now with ServiceMax, we can train techs right away and get them out in the field.** If the tech has any questions, they can Facetime¹ with a senior tech. ServiceMax Mobile for iPad gives the technician confidence and the customer gets their work order fixed the first time,” said Mr. Bairstow.

Tundra’s 4-6 weeks invoice turn around has also been significantly reduced. ServiceMax drastically improved cash flow, with invoices being delivered within a week after a work order has been completed.

With ServiceMax, Tundra Solution’s non-billable time has decreased by 25% as technicians are now able to communicate with other technicians from the field and attach pictures or videos to a work order with their iPad. This real-time help has also increased their first time fix rates.

Tundra Solutions is now able to track these metrics and many more. They have visibility into areas of their business that might need focus and can see which teams are performing well – giving them an unprecedented ability to manage their operations based on real data, not just guesswork.

1- Facetime is the trademark of Apple, Inc.