Itergy

Insights

CASE STUDY

Fast Facts

- Leading construction excavation organization with 90 truck fleet

- +200 emloyees

- Based in Ontario, Canada

Product used

S> SharePoint

Challenges

- IT department could not keep up with company growth
- Fragmented , mostly manual business processes
- Visibility with regards to company operations was limited

Solutions

- SharePoint Integration

Client

The Bartels Group is a leading, fast-growing construction excavation company in the Hamilton and surrounding region, specializing in hydro-vac services. They have approx. 225 staff, including office and field staff, with a fleet of 90 trucks on the road.

Objective

Bartels Group required an end-to-end solution that unified their full customer engagement experience right from sales, through project execution, and to billing.

Challenges

While their business had experienced rapid growth, their internal IT had not kept pace. Departments were disconnected, business processes were fragmented and largely manual, staff had trouble finding information/sharing information, and management had little visibility into how things were going.

Solutions

1 - O365 Consolidation

They had been partially onboarded to O365 by another vendor, however it was done poorly:

- Multiple tenants (one for each company), which meant multiple mailboxes for staff working across companies.
- No AD Connect, which meant users had different accounts for accessing on-prem or cloud resources
- Many devices were not even domain-joined, so many users had a 3rd account just to log onto their laptop

Therefore, we consolidated their O365 into one tenant, set up AD Connect, and fixed up their devices and accounts.

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2 - Azure IaaS

They were running critical systems on old on-premise infrastructure (e.g. Dynamics AX – their billing and accounting system), therefore we:

- we migrated these servers to VM's in Azure, established VPNs, and extended AD – this solved their stability and performance issues
- we now manage this infrastructure for them (backups, patching, etc).

it worked well enough that we subsequently migrated their Toolbox system (their work scheduling & dispatch system) to Azure as well.

3 - Sales Center (SharePoint based)

They had no centralized tracking of CRM data (each sales person was tracking it themselves, via spreadsheets or worse), had no consolidated reporting, etc. Therefore, we took the following steps:

- Deployed our SharePoint-based "CRM-light" solution called Sales Center, which allows them to track Accounts/contacts/opportunities/quotes/activities, provides pipeline reporting etc.
- Built a mobile Sales Center app for them to better support their outside sales team

4 - Data synchronization between primary business systems

They had several business issues stemming from the fact that their 3 primary business systems (Sales Center, Toolbox, and AX) had a lot of redundant account/contact/billing info, but were disconnected so each system was a mixture of current and old/incorrect data.

- we built a solution that sync's account & contact info between Sales Center, Toolbox, and Dynamics AX

5 - Automated Credit Card processing solution (with full PCI compliance)

Bartels Group does considerable work via credit cards, particularly for new clients with whom a trust level has not yet been established.

They were capturing and tracking credit card info in a spreadsheet and processing payments manually via a POS terminal. This process was extremely error prone i.e. bad info entered, card expired/cancelled, insufficient funds, etc., and not to mention time consuming. As a result, A/R had to spend countless hours chasing missing info, payments, and not uncommonly work was unbilled and written off.

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They already had an existing merchant account via TD, which uses Bambora as the back-end payment processor – hence we built an integration with their Toolbox system that provided the following features:

- Any time work was booked, our system would check Bambora for whether a credit card payment profile exists for the specified customer
- If not, an email with secure Bambora link was automatically sent to the client asking that they set up a payment profile (this way the payment info was always current, and was stored by Bambora so no more PCI concerns for Bartels)
- Then it would transact a pre-authorization against the payment profile for the estimated job cost
- Upon successful pre-auth, our system would release the hold on the booked work in Toolbox and Dispatch would be able to send the truck out.
- Upon unsuccessful pre-auth, our system would automatically email the client informing them of the failure, and providing them instructions on how to remedy, and informing them that until they do so the trucks can not be dispatched
- Then once the work is done, A/R can use the Bambora interface to charge against the pre-auth transaction, so payment is easy and guaranteed

This entire process has saved Bartels Group a lot of lost time and money – A/R now spends zero time on pursuing collections, and there is no lost money due to bad credit cards. Because of these improvements and the ease of transaction, overall throughput on credit cards has increased to roughly $100k per month!

6 - Customer-driven Onboarding process

They had many business issues resulting from incomplete or incorrect information being obtained from a client when they would call for work..

> i.e. someone would call dispatch to get a truck sent to a job site and dispatch would capture minimal info just to send the truck out, however due to the insufficient info, billing was a major issue. A/R would now be forced to track down info & payment.

- We built a SharePoint-based solution which allows inside sales to receive a call, quickly enter a minimal amount of client info such as an email, and an email would be sent to the client with a link to a webform so they may enter their own data
- Once the customer completes the form, the information is captured into Sales Center and sync'd to their other system
- This solution can also be used to request updated info from existing clients (which they have normally done by bulk faxing out a form and manually typing in any responses they may receive)

About Itergy

Established in 2001, Itergy provides best of breed managed and professional services for Microsoft infrastructure technologies. Itergy manages client domain controllers in 65 countries on 6 continents

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7 - Centralized Price Book solution

Bartels Group was managing all their pricing agreements as Excel docs, converted to PDFs, faxed/emailed to the client for signature. There was no management of price increases, agreement renewals, etc. We built a database solution surfaced in SharePoint that allows them to :

- Construct agreements based on a few simple selectable options and a standardized agreement document template, auto-generate the PDF doc, email it to the selected client for secure online approval, register the approval, provide reporting on upcoming renewals / agreement statuses, etc.
- We then integrated this with the onboarding process, to autogenerate a pricing agreement for a client during onboarding.
- The pricing database will also be used for auto-generation of invoices, in a subsequent project phase

8 - Project Center solution:

Bartels Group was managing projects via spreadsheets and email therefore we developed the following:

- Project collaboration and management solution for them based on SharePoint Group sites which allows them to track and trace all their work items (i.e. anode restoration, stormceptor cleanouts, pole setting, test pit excavation, etc.), assign work to the field staff, capture updates from the field, and do reporting on project progress and profitability
- We later added a mobile app that their field staff uses to receive daily assignments of work items, and provide real-time updates regarding their work progress on these items

9 - Land Management solution:

In addition to excavation, Bartels Group provides waste removal services for municipalities and spread this biomatter on farms as fertilizer. This requires heavy coordination between municipalities, government oversight, tracking scheduling with Dispatch, tracking of field conditions, application quantities, etc.
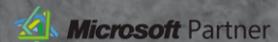
- We built a map-based interface within SharePoint that displays all their sources and application targets on a map, so they can plan and schedule all activities
- This replaced a collection of spreadsheets they had used prior to this solution

10 – Reporting

They had little visibility on overall corporate operations – what little reporting they had was all manually generated via spreadsheets on monthly intervals.

- We introduced Power BI and built a data warehouse that pulls key data from all corporate systems
- Built a number of reports and did a knowledge transfer to all staff in order to manage report evolution

This was a major holistic set of solutions which transformed their business!

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