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ASTEA CUSTOMERS IN ACTION: **DANKA**

How **Danka** turns its competition into copycats with a uniquely customized field service solution with Astea.

> "As good as they were, we knew that our technicians would have to raise the performance bar ever higher to stay ahead of the competition. This required a new approach. One that would keep us ahead of the field. One that would enable our technicians to deliver more sophisticated, yet cost-effective solutions on a more timely basis."

– Michael Calcinari, VP of Service Planning and Support

In 2006, Danka leadership made the decision to update the company's service management solution, which was largely based around a self-service interactive voice response (IVR) system. After engaging with multiple vendors, Calcinari, impressed with Astea's dedication to identifying and supporting each customer's specific day-to-day processes and requirements, chose Astea's FieldCentrix FX Mobile®, a workflow software for automating field service processes. With FX Mobile, field service personnel can receive work orders electronically, access real-time parts information and other backend data, digitally collect customer signatures and continue working regardless of wireless coverage.

Now, nearly one year after signing with Astea, Danka is completing the final phase of technician training in what has been a well-received national rollout to 1,000-plus field workers. Danka ESP has further refined the company's already impressive technician-to-dispatcher ratio of 200 to 1; improved real-time visibility to its parts inventory; increased the number of work orders completed daily; delivered measurable cost savings; led to the signing of additional customers and improved retention; and, perhaps most important of all to Calcinari, enhanced Danka's brand value and professional standing as an industry leader.

Defining Success in Service

Aberdeen Group research shows that the highest-performing field service organizations (a group it calls Best-in-Class) have several characteristics in common. They're 71 percent more likely than Laggards (or the lowest-performing organizations) to measure field service performance; they're twice as likely as Laggards to update parts inventory based on daily or real-time usage; and they're three times as likely as Laggards to have implemented a service management solution. Further, Aberdeen Group discerns that performing as a Best-in-Class organization requires:

- Enabling real-time, two-way data flow between all elements of service operations
- Ensuring that new technology solutions can integrate well with existing infrastructure
- Using data captured from mobile devices to feed real-time analytics and performance measurement systems.

The business case for deploying a mobile solution within a field service environment is so strong, says Micky Long, research director of service chain management with Aberdeen, that "even without a fully refined business process, mobile technology will pay off." However, he continues, it doesn't make sense to make a big investment in mobile technology if you're not going to be able to implement it well. Aberdeen research shows that Best-in-Class companies generate profit margins from service operations that are three times greater (18 percent versus 6 percent) than those of Laggard firms.

"You need to start with a business process first, before you go off and buy into a mobile solution," says Long. "And you need to understand what problem you need to solve—is it a scheduling problem, or is it a parts availability issue? Identify what your business process is, and then fit the solution to your business."

Building a Solution: Best Practices

"When Danka came to us, they really didn't have a lot of pain points," says Chris Iannone, a FieldCentrix project manager. "But they saw the productivity that could be gained from a real-time solution. With FX Mobile, we have a proven methodology—we know what it takes to be successful."

John Coakley, director of Field Centrix, worked closely on the Danka deployment with Iannone, and explains that there are eight steps, or tracks, to Field Centrix's globally proven project methodology. Tracks one through three, at inception, address: project planning; the establishment of a mobile environment; and the choosing of mobile devices and wireless carriers. In Danka's case, project planning was not a significant issue.

"We didn't have to spend a lot of time figuring out what Danka needed, which is usually a stress point," says Coakley. "They knew what they wanted—their knowledge of their business is incredible—and decisions could be made quickly."

Long-term planning on Danka's part had laid an early foundation for the company's ability to further embrace mobility. "Almost from the very beginning, when we were still putting our prior system in place, we were thinking about the next steps," says Calcinari. "So when we built our backend ERP system, things that we were doing threeor four years ago were done with the idea that someday we would have a handheld solution that will utilize these systems." Additionally, Calcinari's team had already created process documentation for every job that could be performed—field activities, parts management, call dispatch, etc.—and noted exactly where the solution could extend or improve upon each process.

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Astea guides its customers toward device choices, from a proven selection that it extensively tests and qualifies. While a small group of Danka technicians require a laptop, and use office-grade machines from Dell, the majority can excel with handhelds. Calcinari chose the Motorola MC70 rugged enterprise digital assistant (EDA), a device that combines the features of a cell phone, computer, imager and scanner, as well as multiple radios for wireless WAN/LAN/PAN voice and data communications. A single

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In an Aberdeen Group survey of mobile field service organizations, the Best-in-Class among them more frequently had "formal business processes in place to maintain up-to-date inventory of spare parts, a critical component of delivering first-call service resolution." For Danka, real-time visibility to parts inventories is already a prevailing benefit of the Astea deployment, in a long list a significant outcomes.

"Danka was emphatic about providing inventory information to its technicians in the field. But they took it a step further," says Iannone. "They've got real-time information not just on the device, but all the way back to their Oracle Item Master. And remember, this was a year ago that they requested this—today, people are just catching up to this." Calcinari emphasizes that the deployment's process and cost benefits have been many-fold, and include:

Benefit Analysis

- Improved device support: The move to Windows Mobile devices has eased Danka's need for continuous hardware support. "With the Windows Mobile devices we don't have to worry about annual operating system licenses, or about Microsoft Office licenses, or virus protection, or that someone's going to load something on their device that they shouldn't," says Calcinari. "The MC70 is a more effective computing appliance for a service technician, and it has the benefit of being cheaper to support [than a laptop]."

- Improved technician productivity: Technicians are now spending less time on administrative processes, since they're compiling information at each job site, instead of completing paperwork at the end of the day. The information is more timely as well as more accurate.

- Improved issue resolution: Previously, if there was a need to see a job's paperwork, it was a long and arduous process, determining where, in which file cabinet, that slip of paper might reside. The Motorola MC70 EDA has changed that. Today, if there's an issue with collection, a signed work order report in a PDF format is instantly retrievable.

- Improved parts visibility: Every technician now has realtime visibility to Danka's parts network, which includes part costs—a detail that enables technicians to "make smarter business decisions in support of the customer." Which is not about driving up bills, Calcinari emphasizes, but just the opposite. "Technicians are now able to use lower-cost parts. A lot of times a technician will hesitate to use a part because he doesn't know the cost. But if he knows that feed tire is just $1.25, he doesn't hesitate to install it." Technicians can now also see whether a part is coming from an internal or external source, which Calcinari is confident will lead to long-term inventory cost benefits.

- Speed to market: The swiftness with which Astea moved the implementation, from contract signing to full rollout, helped Danka achieve a considerable cost savings. "This was a 1,000-plus user, cross-country rollout—the cost of that on a manpower basis isn't trivial, especially considering that with a project like this you need your best and brightest to be dedicated," says Calcinari. "If you spread out a process like that over three or four years, you're not doing the other things you could be doing to improve your business."

- Improved professionalism: The image that Danka technicians present to customers is extremely important for the Company. "Traditional benchmarks in the FX Mobile project methodology are set by defining key performance indicators (KPI) such as decreased manual office paperwork, or decreases in orders unbilled at month's end," says FieldCentrix's Iannone. "But Danka is unique in that in lieu of numerical KPIs, their strategy is more intangible: They want their customers to see their techs using leading-edge technologies and providing real-time customer information in the field. Danka technicians are intensively trained, and they want them to have a 'white collar' presence."

  Calcinari concurs, citing the fact that technicians used to leave handwritten work orders with customers, but today they send a professionally formatted PDF with the customer's signature directly to the customer's email. "Professionalism comes first and foremost. That actually leads technical knowledge, in my opinion."

- Improved company communications: Front offices can generally communicate with managers, but having full access to field technicians is another story. Danka technicians now have Microsoft Outlook clients on their handhelds, which has solved what Calcinari calls "the final mile of communication," and made it as easy for him to reach each technician as it is to reach their managers.

- Reduced demand on human resources: While Danka has yet to recalculate its already impressive 200:1 technician to dispatcher ratio, the company has, however, already experienced a 50 percent reduction in the number of times that technicians call in to speak with a dispatcher.

Adding to the list of benefits attendant to the Astea deployment is the advantage it provides Danka's salespeople to close deals. Further, while difficult to measure, the increased professionalism of Danka's technicians surely encourages customer retention and further differentiates Danka in a highly competitive market. Calcinari is thoroughly pleased with the new FX Mobile solution, though, true to form, he's already looking ahead and has tasked Astea with a statement of work for three future phases of the deployment.

"With this implementation," Calcinari affirms, "I think we set ourselves up on a platform for the next decade. It insures that we'll maintain a level of efficiency and optimization that will be hard for others to match."

> The company implemented consistent service processes which have directly resulted in reduced administration costs.

carrier, AT&T, was chosen for cellular and data services, which has so far proven to be "very, very effective," says Calcinari. "We have wide levels of coverage and a good number of bars in most areas."

Tracks four and five of the FieldCentrix methodology are: the discovery of business processes; and then installation and configuration. "We're very careful when we do our implementation services," says Coakley. "We spent the better part of two or three months in discussions with Danka, really trying to understand their business processes." It was this attention to the business process that differentiated Astea, says Calcinari, when he engaged with them originally. "They flew one of their chief integrators out immediately," he explains. "Rather than going through a one-sided Web cast, he spent the better part of a day with us, going through all of our service processes and learning what our thinking is. From that he matched strengths to strengths and came back with ultimately, what the Astea offering is."

The flexibility of the FieldCentrix solution, which can integrate with an existing backend system or create one, made it an easy fit for Danka. "Mapping to the FX software was largely a function of extending our backend system to the handheld, versus creating a new one," says Calcinari. "The strength of FX Mobile and Astea is that they are an integrated shop. They have a service center and can extend their backend all the way to the technician. I'm just changing that backend system to our own. So they've certainly solved all of the problems with synchronization and sequencing and 'how do you manage data in a semi-connected environment.'"

The sixth FieldCentrix track sees to customization requests, which were a considerable portion of the overall Danka project. "The first week, hearing about Danka's customization requests, was very eye-opening," saysfield manager Iannone. "They were unlike anything anyone had asked for before. But it was clear that Danka was leading the industry with their ideas." Some customizations were as simple as changing an icon to look more like the function it represents; or reducing the number of actions required to perform a task. Others, however, were still more innovative, such as adding the ability for team members to view each others' work loads, so that they could potentially help each other out, or know if a colleague nearby has a part that one of them needs. Says Calcinari: "All you have to do to have a technician do the right thing is make it easy for him to do it. So adding that visibility allows them to see more easily what the job at hand is."

And lastly, tracks seven and eight address training and deployment, and on-going support—the latter of which is occurring now, as Astea educates its own team about Danka's processes, in order to anticipate future needs or requests. For the former process, Danka took the "train the trainer" approach, deputizing 20 specialists from around the country, making them evangelists for the project out in the field.

"That's probably the single best thing that we did from the standpoint of getting end-user buy-in and a getting a wide audience of people to know what was going on," says Calcinari. "I've taught about 15 or 20 sessions myself, but the effect is never like it is when it comes from one of the field evangelists. My technical knowledge of the program is offset by their intimacy with the market and the other technicians."

ASTEA
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www.astea.com

CORPORATE HEADQUARTERS (USA):
240 Gibraltar Road, Horsham, PA 19044-2306
info@astea.com • +1.800.878.4657 • +1.215.682.2500

EUROPEAN HEADQUARTERS:
Ground Floor, North Suite, The Place, Bridge Avenue
Maidenhead, United Kingdom SL6 1AF
info@astea.com • +44.0162.891.5100

ASIA PACIFIC HEADQUARTERS (Australia):
118 Christie Street, St. Leonards, NSW 2065
info@astea.com.au • +61.2.9436.0855

JAPAN HEADQUARTERS:
14Fl, West Wing, Aoyama Twin Tower, 1-1-1
Minami Aoyama, Minato-ku, Tokyo 107-0062 Japan
marketing.japan@astea.com • +81.3.5775.0130
+81.3.5775.0132