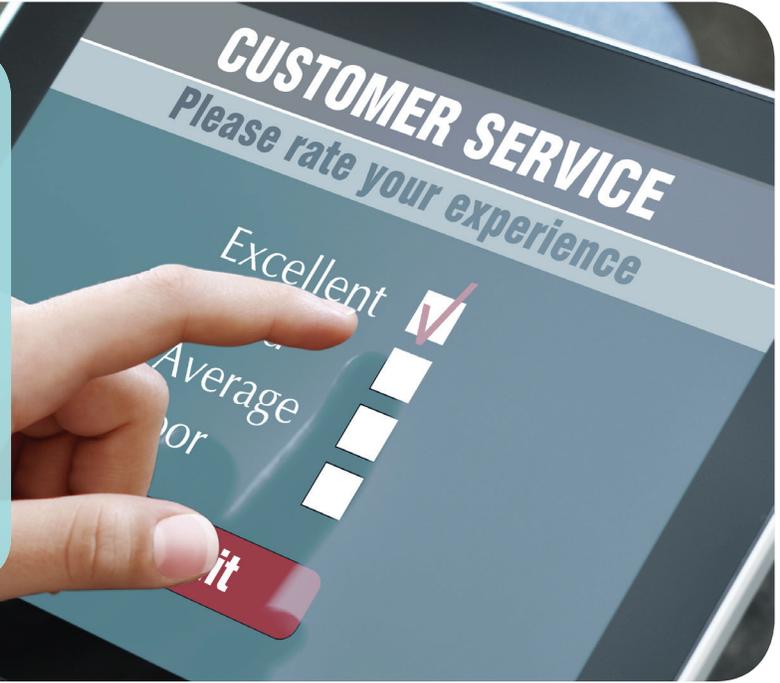


FieldAware Automation Helps with Business Transformation

“This has led to a 15% increase in overall revenue and provides greater benefit to our customers from the improved service we can deliver.

Chris McFadden, Cross Group's Service Director



About Cross Refrigeration

The Cross Group is an organization made up of eight service and rental companies in Ireland and the United Kingdom. While they have interests in a number of sectors, the core of the business is still founded in commercial and industrial refrigeration and air conditioning. Today Cross Refrigeration is the widely-recognized leader in the supply and installation of industrial and commercial refrigeration in Ireland.

Cross Group companies are innovators in a number of areas including: renewable energy, refrigeration, air conditioning, fruit ripening and the temporary hire of refrigeration, air conditioning, chiller, boiler and heating equipment. The Cross Group's combined turnover is more than \$100 million.

The Cross Group has a strong focus on technologies – especially green technologies and is committed to delivering solutions that are eco-friendly, energy efficient and still value for money.

Challenge

Cross Refrigeration serves a range of sectors including retail, medical, pharmaceutical and hospitality and their teams provide a 24 hour, seven days a week service. Their work is critical to the customers who depend on them, as they cannot have downtime of their refrigeration units.

The after-sales service teams are responsible for all contracts including service, maintenance and emergency repair and the business was expanding, but some processes were affecting their growth potential. Use of paper-based processes meant that the teams couldn't always be as efficient as they wanted and a paper-based work order system was slowing them down.

With a busy and expanding company carrying out a range of service, maintenance and repair work with the emergency coverage to be managed too, Chris McFadden, Cross Group's Service Director says they recognized changes needed to be implemented.



Cross Refrigeration



More Information or to schedule a free demo:

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 FieldAware™



“The reliance on paper work orders meant we experienced delays where we didn’t need to,” Chris McFadden says. “From the time it was taking to submit and process the paper work for invoices alone, we were seeing delays to customer billing and payment was taking over two weeks which we knew we could easily reduce.”

“We also wanted to be able to offer our customers an enhanced service on-site, face-to-face with their technician for our new products and services, but we didn’t want to overload them with even more paper and information. We use Salesforce for our customer relationship management but we just didn’t have any easy way for our field technicians to make use of this wealth of customer information, which would help them do their jobs and manage this enhanced service so much more easily.”

In order to improve their business processes, eliminate the delays of paper-based working and enable technicians to improve the service offering to customers, Cross Refrigeration recognized they wanted to automate their field service. Already using Salesforce CRM, Cross Refrigeration wanted to ensure the solution they chose could integrate with Salesforce seamlessly to ensure a smooth, efficient implementation.

After evaluating several solutions, they chose FieldAware.

The Solution

FieldAware is a comprehensive cloud-based field service management solution using modern web and mobile technologies that allow organizations to easily and efficiently manage service requests, scheduling, dispatching, invoicing and reporting.

FieldAware was built to integrate seamlessly with other business software and solutions, including Salesforce and sits on the Salesforce AppExchange. The flexibility of integration is due to the open-API (application programming interface) framework that FieldAware employs which means that it can integrate easily with CRM, ERP or Accounting solutions, without the need for complexity.

Having selected FieldAware for their field service management, Cross Refrigeration implemented the solution in just five days. The business was then able to move forward very quickly to realize the benefits of the automated solution and how it extends the value of Salesforce out into the field.

Using FieldAware for Salesforce, customer information can be shared and updated from the office to the field and then job information is captured and synced directly back to Salesforce via the FieldAware mobile app. The field teams now have access to the job history and customer records allowing for a more detailed understanding of not only the task at hand but also what has happened before and why.

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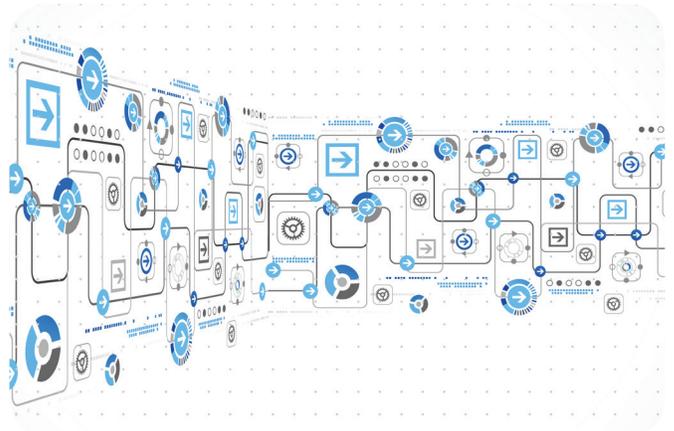
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FieldAware Extending the Power of Salesforce

Using FieldAware's open API has allowed Cross Refrigeration to extend the power of their data even further. By taking advantage of the API's flexibility, they have created customized data flows into Salesforce to expand the information in to other parts of the business:

- **Case Management** ensures that all the right people are updated with the right information, meaning multiple visits for any single job can be tracked and assigned to the right technician every time, preventing unnecessary service visits.
- **Customer Notifications** keep customers up to date with automated progress on jobs every step of the way, so are fully informed of what is happening even across multiple sites.
- **Live Dashboards** track all generated cases creating notifications on any jobs that aren't moving and also flag sales cycle opportunities with customers.
- **Parts Management** means that restock level notifications are auto generated and sent to the purchasing department.
- **Maintenance Contracts Management** provides a schedule of maintenance is automatically generated for the contact period and managed through the life cycle through maintenance reporting and contract value reporting capabilities.
- **Approval Processes** are in place to flag certain jobs where they are for important customers, the value of the job is over a certain amount or the job doesn't have the correct profit margin or high costs parts are associated.
- **Invoice Management** is a seamless integration that automatically invoices jobs that have passed through back office approval.





The Result

The results that Cross Refrigeration has seen are significant. Scheduling and dispatching have been improved. As work orders are received, the back office is automatically updated with job status, product usage and other data which then flows through to the relevant technician who has all the information they need. This eliminates dozens of daily phone calls between the office and the field and with the smart scheduling means an 85% reduction in rescheduling due to slipped or missed appointments.

“With this improved efficiency, we have seen that job completions are quicker because the technician has everything they need to carry out the work,” says Chris.

“The job and customer information is sent straight to them and they can access it all on their handheld device. This then allows the technician to update the office instantly on progress, to order any spare parts that are required and then submit their status reports without having to return to base.”

“Our paper work orders are virtually gone, the office staff is happy and the field technicians are generating about 15% more business than last year in roughly the same amount of time. This is an average of two additional jobs that are being completed each week by each technician – which is significant for us and for our customers.”

In addition, the Customer Portal provides Cross Refrigeration customers with the ability to get their own updates and monitor their job in real-time too, whenever they need to. The access is instant, 24/7 and doesn't rely on customer support team.

The range of services that field technicians have been able to offer customers, while they are on-site with them, has also expanded and as a result sales have increased.

“With FieldAware the technicians have prompts they can use for the additional services and maintenance contracts we offer, as well as access to customer information through the integration with Salesforce. This makes it all very straightforward for technicians while face-to-face with our customers,” comments Chris.

“This alone has led to a 15% increase in overall revenue without any staff increases and provides greater benefit to our customers from the improved service we can deliver.”

The average billing cycle has reduced from being over two weeks to just two days as customer payments are arriving more quickly because jobs can be invoiced just minutes after completion.

Chris McFadden concludes, “our cash flow has also improved because we're able to invoice for work immediately after jobs are complete. It's a whole new business.”

Contact Us

To learn more about our solutions
or to schedule a demo:

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