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Barloworld Handling: Automating Service Scheduling to Increase Efficiency and Customer Satisfaction

Barloworld Handling

Executive overview

Company

Vision

Why SAP

Solution

Benefits

Company
Barloworld Handling UK

Industry
Industrial machinery and components

Products and Services
Forklift trucks and materials-handling equipment

Web Site
www.barloworld.co.uk

SAP® Solutions
SAP® Multiresource Scheduling application

To achieve its goal of providing exceptional equipment servicing, Barloworld Handling UK sought to automate the dispatch of technicians with the right parts to complete their work quickly and effectively. By integrating the SAP® Multiresource Scheduling application with service, mobility, and call-center functionality from SAP, the company has **increased planning and service efficiency, increased technician productivity**, enhanced customer satisfaction, and reduced service costs.

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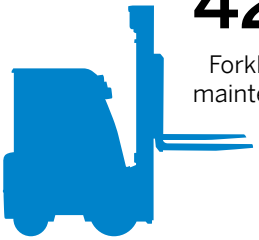
Leading materials-handling equipment and service solutions

Part of Barloworld Ltd. – a global provider of integrated solutions in industrial equipment, logistics, distribution, and supply chain management – Barloworld Handling UK is the world's largest independent forklift truck dealer. Headquartered in the United Kingdom, Barloworld Handling also serves customers in Northern Ireland, the Netherlands, Belgium, and southern Africa.

Barloworld Handling offers total business solutions to optimize materials-handling efficiency. The company partners with Hyster, a leading forklift truck manufacturer, and has more than 42,000 forklifts under maintenance contracts. In addition to forklifts, Barloworld Handling supports a variety of warehouse and specialist trucks. Key business services include forklift training, fleet management, tire fitting, health and safety management, battery management, warehouse simulation, and finance.

Barloworld Handling services most of its equipment on-site. Increasingly, the company is using telemetry technology to diagnose problems remotely, automatically create service orders, and appropriately dispatch its more than 900 technicians with the exact parts they need for routine maintenance and repairs.



42,000

Forklift trucks under maintenance contracts

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Best-in-class service with lower cost and greater efficiency

"We seek to provide best-in-class service to our customers," says Barloworld Handling CIO Robert Tennant. "This means completing maintenance and repairs on the first visit whenever possible – which also reduces our costs. There are a lot of logistical complexities involved in making this happen, however."

Besides dispatching technicians with the right skills and parts, Barloworld Handling must consider factors such as current workload and any customer preferences for specific people. The company must also address any entitlements in its service-level agreements – such as the right to replacement equipment if repairs or maintenance take longer than a specified period of time.

"All site-visit scheduling and entitlements were handled manually before we installed the SAP Multiresource Scheduling application," says Tennant. "This took a lot of time, offered limited transparency, and made it difficult to interpret customer entitlements. We believed that automating the dispatch process would increase efficiency, reduce costs, and enhance service."

A few years ago, Barloworld Handling installed the SAP Mobile Asset Management application to enable remote connectivity for its service fleet, automate paper- and mobile phone–based processes, and centralize its service operations. Two years later, it started to equip its trucks with telemetry devices, which report truck usage and condition data. The next logical step was to leverage data provided by the mobile application and the telemetry devices to automate the scheduling of technicians. This data also allows Barloworld to select technicians with the appropriate skills for the diagnosed problems and to send the correct parts.

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Smooth integration with service and mobile functionality

Barloworld Handling first installed SAP software in 1998. In addition to the SAP ERP application and SAP Mobile Asset Management, it uses SAP solutions for business intelligence and customer relationship management. Finding software that would integrate smoothly with its existing solutions was a key factor in the selection of SAP Multiresource Scheduling.

"We wanted to process customer calls and technician dispatches in the most efficient and effective way," Tennant says. Also critical in the choice of SAP Multiresource Scheduling was a real-time, customizable dashboard that allows dispatchers to monitor performance against agreed service levels in real time and to respond to problems and assign resources proactively.

After a nine-month implementation, Barloworld Handling started using the new software in the United Kingdom, and then in Belgium and southern Africa. Within a year, the system was being used by 20 dispatchers to manage the schedules of more than 900 technicians. The SAP Consulting organization helped incorporate the proper source data into the new application and ensured that dispatchers and other users had the skills they needed to make the most of the software.

Carefully planned training with a pilot group prior to live implementation smoothed the transition to the new software. Because the software integrated readily with other operational solutions, it was possible to see when dispatchers were not using it properly and to provide extra training where needed.

900

Technicians supported within 12 months of implementation

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Scheduling processes now automated and centralized

SAP Multiresource Scheduling integrates fully with a dispatcher dashboard for scheduling and resource optimization and with the mobile asset management functionalities. Integration with the company's call center and service functionality enables centralized and cohesive customer relationship management. "We can now track the whole customer service process minute by minute," Tennant says.

The software – which Barloworld Handling can configure to its specific needs – tracks technicians and other resources by skill set, experience, cost, location, commitment schedule, and other data related to suitability for particular service tasks. Scheduling has been centralized by country for individual technicians and work groups and incorporates local knowledge of customer needs.

A planning board helps dispatchers visualize scheduling for multiple types of resources and equipment on a single screen, while drag-and-drop features help them make service assignments. An alert monitor notifies dispatchers of scheduling conflicts and special needs, such as entitlement deadlines. "We have about 10 different entitlement clocks that start ticking with the creation of each service order," Tennant explains.

Analytics functions help Barloworld Handling improve scheduling to maximize available resources and fulfill entitlements more effectively. And managers can create detailed and accurate reports on available resources and their deployment.

> "Automated scheduling, combined with our telemetry technology, will make us more proactive in dealing with potential service issues."
>
> Robert Tennant, CIO, Barloworld Handling UK

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Improving efficiency and service while reducing costs

With SAP Multiresource Scheduling, Barloworld Handling can quickly fill service requests with the resources that will maximize efficiency and customer satisfaction while minimizing costs. Correctly matching technician skills to the required task has increased technician productivity by reducing travel time and work time. "The quality of our planning has clearly improved, which has improved our service," confirms Tennant.

Tennant estimates that the new software will significantly reduce costs for service execution and expects a cost payback period of less than a year once optimization is enabled. He also expects a massive improvement in meeting customer entitlements.

Barloworld Handling will soon switch on an optimization engine that will schedule technicians based on preset rules. The company next hopes to leverage the flood of telemetry data it is now collecting.

"We're talking to universities about using the data to identify repair patterns and move increasingly from reactive maintenance to the Holy Grail of preventive maintenance," Tennant explains. "We hope to predict equipment failure more accurately and prioritize our scheduling based on when equipment is likely to break down. This would help us create strategies around service in particular areas and anticipate what parts and technicians each customer will need." Also, if there is a breakdown, the company schedules preventive maintenance to be done at the time of the breakdown, thus reducing the time equipment is out of service.

> "We've already seen an increase in service completed on the first call and expect to complete planned maintenance at a higher rate, which should cut down on downtime and emergency repairs."
>
> Robert Tennant, CIO, Barloworld Handling UK

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