

Case Study: Carrier Cleveland

Carrier Cleveland: Serving Industry

The Cleveland branch of Carrier Building Systems and Services Division is a 15-person office serving primarily commercial and industrial clients in the greater Cleveland area, including the Rock n' Roll Hall of Fame and Museum.

Automating the System

In September of 1995, the Cleveland Branch of Carrier Building Systems and Services installed Data-Basics' SAM Pro Enterprise on their new computer system. SAM Pro, written in the object-oriented language Smalltalk, is a service management system created expressly for Windows. The SAM Pro system replaced a manual T-card dispatching system augmented with a computer-generated, printed schedule.

Mary Jo Heinrich, the Service Coordinator for Carrier Cleveland, has been with the company since 1973. She performs a variety of tasks, including dispatching, scheduling, managing service agreements, and so on. In the mid-1970's, Ms. Heinrich instituted the manual T-card system for service calls. This system displayed a full week for each technician's service calls. A calendar board provided scheduling and actual service date information for contract work. The advantages of this type of manual system should not be ignored. It is direct and easy to use, requires little training, and it is flexible—the dispatcher can play “card shuffle” when necessary to reassign technicians. Finally, since a T-card system can be physically expanded as technicians are added, the size of the board itself is not limited.

The major disadvantages of this manual system concern information display and retrieval. Obviously, the amount of information that can be displayed on a T-card or calendar board is limited; work order and client history information must be retrieved from one or more files. In addition, since a T-card system looks only one or two weeks into the future, planning and coordination with preventative maintenance sufferers.

Company

Carrier Corporation
(www.carrier.com)

Vertical Industries

Manufacturing and Service

Country/Region

Greater Cleveland area

Solution

SAM Pro Enterprise implemented by
Data-Basics Software Solutions

Solution Description

Integrated software application
providing real-time access to service,
dispatch and preventative
maintenance scheduling.

Meeting the Challenge

At Carrier Corporate, the challenge in computerizing its branch's scheduling and dispatching functions was twofold. First, the software had to improve customer service and branch efficiency by automating the dispatching and preventative maintenance scheduling functions. In doing so, the system had to be able to exceed the abilities of its previous system, which combined computer software and a manual T-card system. Secondly, the system had to be able to support the needs of Carrier Corporate by providing them with vital information in a timely manner—service trends on equipment, branch efficiency and more.

Gerry Pacella, Project Leader for Service Reengineering, Carrier Business Systems and Services, explained the software selection process in the following interview.

Our major selection criteria were that the software supports our field branches by automating both dispatching and preventative maintenance scheduling. As you know, maintaining a schedule of hundreds of man-hours of PM work is a major undertaking by hand—but one that is well suited to computerization. And our branches wanted software that was ready to roll—now.

In addition, our system had to provide a broad spectrum of site and equipment data and history so the dispatcher could quickly assign the correct technician to any job. Finally, the software had to provide a variety of information to branch managers and corporate headquarters: trends on equipment, resource use in branches, and so on.

The SAM Pro software enables us to proactively address new trends in the industry. In particular, the shift from blanket type to task-oriented maintenance contracts makes it imperative that we account for all tasks on each piece of equipment at each site. The ability to automate the entire maintenance contract procedures and integrate them with emergency service calls was a major factor in our selection of SAM Pro.

After selecting Data-Basics' SAM Pro Enterprise software, training was scheduled for the Cleveland branch in late September of 1995. A team-teaching approach using both Carrier and Data-Basics' personnel allowed Heinrich to be up and running quickly. As Mary Jo recalls, "I went from knowing nothing about PC's to being a Windows' power user in less than a week."

Going Live with the New System

For several weeks, Ms. Heinrich retained her manual T-card system while learning the new software. Finally, the big day arrived when she moved her old manual board to the warehouse and “went live” with the SAM Pro dispatch board. However, as Mary Jo continued to use the system, it became apparent that improvements in the software were needed. In particular, a way of displaying work orders that included several technicians for one or more days was needed. Data-Basics’ developer William App responded with the Multiple Technician Work Order feature in January 1996.

With all the major pieces in place, Data-Basics continues to use customer feedback to refine and improve its product. Most recently, an “available hours” view has been added to allow the dispatcher to quickly spot and resolve scheduling conflicts. By implementing Windows’ drag and drop capabilities, available hours provides the dispatcher with a virtual “T-card shuffle” that is easier and quicker than the manual version.

Looking back on the previous year’s installation, training and learning process, Ms. Heinrich notes “The software has definitely saved me time in the long run. It has been well worth the investment in time and training.” Mary Jo plans to instruct her coworkers in the new system this fall, as well as to acquire new knowledge and skills herself.

Since SAM Pro is ODBC (Open Data Base Connectivity) compliant, database tools such as Microsoft Access can be used to create user-defined reports. “As I improve my expertise with Access,” Ms. Heinrich explains, “I can create reports using the information in SAM Pro’s database to organize information for me and my branch manager.”

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