

Case Study: Engineering Excellence, Inc.

The Challenge

Engineering Excellence, a leading contractor in HVACR and facilities management services, was at a crossroads in early 2001. The family-owned company needed new software that would automate internal processes, allowing the company to offer better customer service. Running on separate service and accounting applications, Engineering Excellence sought an integrated system that would prove flexible enough to match the company's growth.

"We needed a technological edge not to not only increase the company's profitability, but also to add value and lower costs for our clients," said Tom Winstel, president, Engineering Excellence.

The Solution

After reviewing multiple software packages, the Engineering Excellence team selected Data-Basics' SAM Pro Enterprise solution. A key feature was SAM Pro's Escalation Manager tool, which automates and controls work order management by triggering a series of alarms and designating actions to be executed. "We saw that Escalation Manager would allow us to eliminate manual processes and proactively manage our operations," said Winstel. "A plus was the ability to automatically keep our customers updated on the status of their work orders," said Winstel.

Having successfully implemented SAM Pro Enterprise's core components, including the service, accounting, construction, inventory and job costing modules, Engineering Excellence decided to extend its capabilities to the Internet. The company introduced Data-Basics' CRMAnywhere — Web client interface — tool in Fall 2003, branded as "Intellittrak." Engineering Excellence has developed a

Company

Engineering Excellence, Inc.
Cincinnati, OH

Vertical Industries

Integrated HVAC Facilities
Management

Country/Region

Nationwide (USA)

Solution

SAM Pro Enterprise implemented by
Data-Basics software solutions

Solution Description

Integrated software application
providing real-time access to service
contracts, dispatch board, payroll,
billing & purchasing information via the
Web.

proprietary service management system and processes around Intellitrac[™]. Intellitrac users include Borders and Abercrombie & Fitch.

"Having the Web access capability was part of our original goal to streamline our operations and allow customers to make requests and update jobs seamlessly," said Rick Evans, executive vice president – national accounts, Engineering Excellence. "Our clients like the round-the-clock access to their work orders and quotes, and they appreciate having a higher level of communication and control."

Results

In implementing SAM Pro Enterprise, Engineering Excellence was able to integrate service, sales and distribution with its back office. The company dramatically increased its efficiencies by automating routine activities such as generating and sending reports and tracking work orders. Plus, Engineering Excellence gained an edge on the competition, as it now offers customers lower costs and higher quality customer service and communication.

With SAM Pro Enterprise, Engineering Excellence expects to grow its business an additional 30-40 percent without having to appreciably increase its internal fixed costs. "We're able to leverage our best resources—our employees—while utilizing technology to lower back office costs and maintain our competitiveness in the marketplace," said Winstel.

Intellitrac is a trademark of Engineering Excellence, Inc.

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