



CASE STUDY

A Study in High Volume Field Service Delivery



Industry: **Oil and Gas**

Headquarters: **Houston, TX**

Website: **www.aegischemical.com**

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Obstacles

- Aegis (Aegis Chemical Solutions) generate thousands of work orders every month – that means hundreds of daily activities need to be executed without giving up on quality customer service.
- Work order invoicing took up to 2 – 3 days after service call completion hence cash flow improvements were not being realized.
- Aegis wanted a flexible scheduling tool so they could meet their customers' complex recurring delivery dates and achieve true automation in the field.

Key Success Areas

- Digitizing work orders and customer billing by automating work order generation, service dispatch and implementing real-time invoicing.
- The field techs use a native mobile app that logs inventory usage, captures photos, and signatures for delivery confirmation quickly. Invoicing is now in real time as service call information update is instantaneous to the back office.
- Aegis works with a designated software implementation consultant, who understands the business processes and has been managing the project from inception to implementation. They made the identified system configurations and provided extensive training.

“The Fieldpoint solution, complemented by the mobile app, has given us an improved ability to process field activities in real time and has made us more efficient. It also has allowed a reduction in billing errors. Through these two areas, we have reduced accounting time spent on invoice error correction, and have reduced the time between activity completion and invoicing. Furthermore, through the use of the mobile app, we can capture more data than previously capable, allowing for improved business analysis, and ultimately more informed decision making.”

Marty Resweber, IT Director, Aegis Chemical Solutions

The Challenge

Aegis found themselves faced with an aging service management system. They needed to make a change and update their FSM (Field Service Management) Software to meet long-term operational and strategic goals of providing quality customer service, reducing costs and minimizing any time wasted. Aegis provide high-quality chemical treatment and technical services for oilfield applications. They generate thousands of recurring work orders every month, each on a specific customer delivery schedule.

The system that Aegis was using before implementation was very complicated to configure and maintain, so it required highly skilled competency and training hence it was costly to make improvements. Work orders were generated automatically, but scheduling delivery dates and making changes to future deliveries was very time-consuming.

The techs at Aegis have busy schedules, long routes to cover and numerous stops to make. Techs had mobile devices to collect data in the field but had to come back to the office to sync their closed work orders with the back office. Since the information entered in the field was not verified, errors would occur frequently. Customer billing took 2-3 days to process and put pressure on customer collection turnaround and cash flow.

The Solution and Results

In 2016, after evaluating many competing solutions, Aegis chose to move forward with Fieldpoint and replaced their existing service management software. After reviewing some other competing solutions, they considered Fieldpoint's solution progressive and advanced enough to meet their needs now, and in the future.

The customer delivery agreements are now entered into Fieldpoint. Aegis required some customized PM (preventative maintenance) scheduling functionality to ensure customers work orders were generated automatically on their particular recurring delivery dates. They are now able to generate work orders on any PM schedule that they choose, and can make changes whenever needed.

The dedicated Fieldpoint consultant assigned to the Aegis project was able to design and build the infrastructure within the Fieldpoint application, so Aegis could continue to define flexible recurring schedules. Whereas this kind of change in scheduling previously required several hours, it is now done in a few seconds.

Dispatchers now ensure that the drivers are occupied to their optimum capacity. The mobile app has helped address the issue of handling the daily work order volume and real-time updates upon the completion of delivery. Presently the techs at Aegis have access to information like customer history, location and the type of service delivery agreement (SLA) they have. They can capture signatures and photos, and work orders are now closed off on site, so invoices are generated in less than a minute in real time. There are no more delayed payments, invoice errors, and limited arrears.

Previously one IT resource had been managing the FSM software, post-Fieldpoint, the resource gained 50 % of their time back to allocate to other activities. Today a dozen resources are operating the software with minimum support. Fieldpoint offers a single platform with an advanced user interface, with customizable fields which make it easy to train users and consequently operations are seamless. A factor that largely contributed to the smooth transition and enhancement of service delivery was the critical role of the implementation consultant. They have an approach where they designed a hybrid, flexible system that is modified with weekly feedback from the team at Aegis. Change management is a huge part of the applied strategy where the consultant identifies areas that could use work even before Aegis reported them. This kind of pre-emptive consulting addresses change management, which is a vital element for most businesses to keep pace with the latest trends in technology to gain a competitive edge in service delivery.

“The key success factor here was that all the service application requirements are met and the team at Fieldpoint understands the unique challenges that Aegis faced in their industry. They displayed a high degree of certainty on how the software would solve problems and helped Aegis achieve their benchmarks, reduce costs, time consumption, boosted efficiency and performance.”

Marty Resweber, IT Director,
Aegis Chemical Solutions