CASE STUDY

CARRYLIFT GROUP

HOW CARRYLIFT GROUP USES PROTEAN SOFTWARE TO DRIVE EFFICIENCY AND MEET CUSTOMER DEMAND

Background

Carrylift Group specialises in the sale, servicing, hire, parts and rental of materials handling equipment. It also provides forklift truck and materials handling equipment training courses. Established in 1988, Carrylift Group is one of the largest privately owned forklift truck companies in the UK. The company has 13 depots and 250 employees, 100 of which are field service engineers.

The challenge

For 15 years Carrylift Group ran its business operations with a bespoke management software package. The software was finance focused, even though up to 70% of Carrylift Group's business is service based.

By the late 90s, Carrylift Group had grown to a point where manual processing of paperwork, combined with the demands of providing customer support before, during and after the sale of forklift trucks, was becoming a big challenge.

"Manual processing was inefficient," said Financial Director Eamonn Smyth. *"Job sheets often got lost. Engineers" handwriting was sometimes illegible. On-site conditions and rain often resulted in paperwork spoiled by oil and water stains."*

He added: *"In addition manual communications made tracking mobile engineers difficult. We were relying on mobile phones for communication. We had to hope engineers would answer their phones and do what was required of them. And contact their depots to accept jobs."*

"We were also acutely aware that 95% of our customers were using email. Yet we were paying salaries for staff folding paper into envelopes."

When Carrylift Group's software became too expensive to maintain and modify, it became clear the technology had run its course. Ultimately the software was restricting the business from moving forward.

Smyth said: *"We had two options. Either we could start from scratch and redesign our existing package at a cost of circa £0.5m or buy an off the shelf package."*

The solution

Carrylift Group shortlisted four prospective vendors. The Group chose Protean for its ability to manage all areas of Carrylift Group's business. It also chose Protean for its experience in the sector and the quality of its team.

"We were purchasing an important piece of software for our business. Honesty was important to us," said Smyth. *"One of Protean's biggest selling points is its staff. As well as being extremely knowledgeable and competent, they did not oversell the product. Their attitude convinced us they would be a good business partner."*

Carrylift Group purchased Protean Software in November 2012. At the same time, it purchased Sage Accounts to handle its finances. Implementation, transfer of data and training took place over the next three to four months. Two months after Protean went live, Carrylift Group issued its engineers with Android smartphones running Protean's mobile engineer app.

Results

Improved visibility of jobs

With job information centralised, Smyth and his team now enjoy full visibility of the business.

The Service Department can run their own reports. If they spot potential issues, they can redirect teams to resolve them.

Plus senior management can keep close tabs on Carrylift Group's sales team. They can analyse activities against KPIs.

Smyth commented: *"We needed automation of processes and good reporting. This was a significant improvement for us."*

Granular information

Not only is information accessible, but also it can be easily absorbed. This means Carrylift Group can effortlessly measure and analyse performance.

"Today we can drill down to individual truck level. We can identify which trucks are problematic. Which trucks are costing us money and which trucks are making us money. We can record servicing frequency, at individual truck level,' said Smyth. 'What's more we can access and view information in a much more user-friendly way."

Full control of field service engineers

Carrylift Group can now track, communicate and collaborate with its field engineers. It can also schedule jobs easily and effectively.

"Now we can see where our engineers are. We can see when they accept jobs. We can see when jobs are due to finish,' said Smyth. 'Protean's mobile technology lets engineers review customer contact history. They can identify common faults. Our workforce is much more efficient."

Reduction in the service to cash cycle

Simplified and automated processes increase productivity and Carrylift Group's ability to plan ahead.

"By automating our processes, the time between finishing a job and sending an invoice out has reduced dramatically,' said Smyth. 'If larger customers desire, instead of sending individual invoices for every job, we can send one invoice for 20 jobs. As well as saving us time, this saves us money."

And finally

Since the initial implementation, Carrylift Group has acquired two more businesses. Each acquisition required a further Protean implementation. Smyth said: *"We get quicker and better with each new implementation."*

He added: *"We have a very good relationship with Protean. As a result we are happy for Protean to use us as a reference point with other customers. I'm happy to do that because of the level of support they give us. And the fact their product works. If it didn't, we wouldn't recommend it."*

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