

Velosio[®]

CLIENT SOLUTION CASE STUDY

City Facility Management
Automates Processes
to Better Serve Clients
and Save Millions

city

MICROSOFT DYNAMICS 365

Overview



Software Solutions:

- Microsoft Dynamics 365 Finance
- Microsoft Dynamics 365 Customer Engagement
- Microsoft Dynamics 365 Field Service
- Microsoft 365
- Microsoft Power Platform

Challenges:

- Manual Processes
- Disconnected Systems
- Reporting and Insight Constraints

Benefits:

- Managing Explosive Growth
- Capitalize on Cloud Technology
- More Efficient Scheduling and Work Orders with Field Service Automation

Company Overview:

One of the world's largest facilities management organizations, serving clients such as Wal-Mart and other large chains.

Industry: Facilities Management

Employees: 9,000+

Headquarters: Jacksonville, Florida

Annual revenue: \$1B+

Background

City Facility Management is a global organization providing facility management services to clients as a one-stop-shop for proactive and reactive facilities-based initiatives. City manages everything from HVAC systems, freezers, lawn care, and much more for its clients – Wal-Mart being one of the largest.

Velosio engaged with City when its incumbent Microsoft partner demonstrated that they were unable to support Microsoft Dynamics 365 Customer Engagement and Field Service. City abandoned the Dynamics project and went back to using its heavily customized homegrown system, making it difficult to synchronize business processes. Every unit within the organization had different customizations, and any changes had to go

through the UK office where the system was being maintained.

Service billing and dispatching was siloed across business units, with nothing to connect the dots. The City team was manually entering 10,000+ work orders a month, manually keying in project completion, resulting in double entry and lots of swivel chair, time-consuming processes. Additional complexity emerged from City's service-level agreements which require a technician to be on site for repair within a set amount of time based on priority level 1-4. For example, a priority one fix requires a City technician to be on site within four hours. If they aren't, City is in danger of compromising its service-level agreement.



Maturity Assessment

Velosio started with a two-hour free Field Service Operations Maturity Assessment, breaking down the complex business processes at City and demonstrating a modern, integrated end-to-end solution. This quickly demonstrated Velosio's expertise in running a field service operation, while also identifying areas of focus for a digital transformation. From there Velosio engaged with the Global VP of Operations (who also had a field service background). During this time, the Velosio team answered questions about Microsoft's capabilities, and held a discussion around the Clients KPIs and the financial outcomes that could be achieved through this initiative. After these initial meetings, City decided to move away from their current partner and contracted with Velosio for Microsoft Dynamics 365 Customer Engagement and Field Service.

Implementation Approach

The goal of the implementation was to manage the organization's uniquely complex business processes with native Microsoft Dynamics 365 functionality, using minimal custom code. Managing workflow customizations with low code/no code tools built inside Dynamics allows City to stay current on the most advanced technology and take advantage of generative AI capabilities. The parts request process is now automated with the new system, with one interface for the technicians seamlessly managing three business processes in the background, including the delegation of authority for approvals. Approval needs to flow through technician to routes, regions, and districts. Each level in the process has a spending cap, and an approval process. For example, a \$10,000 project needs approval at the VP level.

During implementation, Velosio walked through City's business process and the configured solution in conference room pilots. Additionally, throughout the project, Velosio utilized change management to establish the right communication, training, and support.





System Benefits

Business processes are now streamlined, and the technician scheduling process is now optimized, matching the right technicians with the right work orders, with algorithms that compare skillsets and schedules. Work orders are now streamlined and automated.

- ✓ Within two months of going live, achieved 100% ROI on services investment
- ✓ Within one year, increased customer base by 34% and easily managed growth
- ✓ Automating manual processes saves the organization millions of dollars
- ✓ Work orders automatically created
- ✓ More jobs completed on the first visit with the right technician
- ✓ Automated alerts if a service-level agreement is at risk because of technician arrival


Next Steps

City has planned a second phase to roll out Dynamics to multiple business units, including Australia and the UK. City's UK branch also tried to implement Dynamics in the past, with poor results. The US team demonstrated what they are using to the UK, and they loved what they saw.



Velosio[®]

Discover how Velosio can help your business with Microsoft Dynamics 365 business applications.

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