



Microsoft Dynamics Customer Solution Case Study



Contractor Automates Business Processes, Accelerates Data Access by 100 Percent

Overview

Country or Region: United States

Industry: Construction

Customer Profile

BP Air Conditioning, a heating, ventilation, and air conditioning (HVAC) mechanical contractor based in Brooklyn, New York, earned U.S.\$61 million in revenue last year with only 115 employees.

Business Situation

A lack of data access, of flexible reporting, and of project management tools caused BP Air Conditioning to seek an integrated system that could improve data visibility while accommodating change.

Solution

BP Air Conditioning deployed Microsoft® Business Solutions–Solomon, now part of Microsoft Dynamics™, and five custom software modules to build an integrated system that has exceeded requirements.

Benefits

- Data access 100 percent faster
- Doubled transaction capacity
- Dramatically improved reporting
- System performance 50 percent better
- Reduced system service calls

“I can’t even measure the improvement in reporting because it has increased so dramatically.”

Lisa Caruso, Controller, BP Air Conditioning

BP Air Conditioning, a mechanical/service contractor founded in 1978, supports financial institutions, professional service firms, and Fortune 500 organizations in Manhattan, New York. By 2003, the company’s UNIX-based business system had become an obstacle to productivity. Along with preventing real-time data access, the system offered inadequate reporting, allowed limited data visibility, and could not be customized to accommodate process changes. With the help of SIS, BP Air Conditioning deployed Microsoft® Business Solutions–Solomon, now part of Microsoft Dynamics™, and five custom modules. As a result, BP Air Conditioning has sped up data access by 100 percent, increased transaction capacity by more than 100 percent, enhanced reporting capabilities, boosted system performance by 50 percent, cut system service calls by 80 percent, and improved communication with customers.



“The service dashboard SIS designed meets our specific business needs. By clicking one button, we can access information related to open calls, follow-up calls, or equipment maintenance.”

Jack Fanneron, Vice President of Service, BP Air Conditioning

Situation

BP Air Conditioning, a mechanical/service contractor headquartered in Brooklyn, New York, constructs and services heating, ventilation, and air conditioning (HVAC) systems for companies in Manhattan and surrounding areas. With only 115 employees, the company books approximately 33 construction jobs and services approximately 100 customers each month. Additionally, BP Air Conditioning manages more than 485 service contracts and maintains some 4,000 pieces of equipment annually. Last year, the construction side of the business earned U.S.\$53.7 million in revenue, and the service department brought in \$7.6 million.

BP Air Conditioning has differentiated itself from competitors by its use of business processes and IT. In the early 1990s, the organization deployed a UNIX-based business system. Although it initially met company requirements, employees could not configure the old system to accommodate business growth and change. Originally designed to support accounting functions, the system restricted information flow to a one-way path from accounting. Data integration between departments was impossible. Consequently, system data could be days or weeks old, and employees had to reenter information, limiting productivity and increasing the risk of error.

Another shortcoming was inadequate, non-configurable reporting. The system offered few options for viewing and exporting data, preventing employees from automatically creating work in progress (WIP) reports or documents that analyzed leads, productivity, or profitability.

To work around system limitations, employees cut and pasted data into Microsoft® Excel® 2000 spreadsheet software or Microsoft Word 2000 documents. However, since the data was not live, no one

could be sure the reports they created or viewed were accurate. Some employees installed their own software to help provide sorely needed functionality. The use of disparate software further inhibited the company's ability to share information between departments and fueled an increasing number of system service issues.

Executives at BP Air Conditioning realized they needed a fully integrated system that could help the business operate more efficiently. The company decided to replace the UNIX-based system with an end-to-end solution built wholly on Microsoft technologies. Employees favored the use of Microsoft software applications such as Word and Excel, so deploying a Microsoft-based technology platform would streamline maintenance, enhance usability, and require less training than a UNIX-based business management solution.

Solution

In the spring of 2000, BP Air Conditioning began evaluating solutions from Microsoft. Executives sought a highly integrated business management offering that could support future growth. Their requirements included real-time data access, customizable reporting, and flexible data output to accommodate multiple reporting packages.

After consulting with SIS, a Microsoft Certified Partner located in Duluth, Georgia, BP Air Conditioning chose to build its new system on Microsoft Business Solutions–Solomon business software (now part of Microsoft Dynamics™), the Microsoft Windows Server™ 2003 Standard Edition operating system, and Microsoft SQL Server™ 2000 Standard Edition for database storage. “SIS and Microsoft Solomon could tie all of our different requirements and processes together into one system,” says Steve Heiderstadt, Vice President of Construction, BP Air Conditioning.

“Now in a matter of minutes, I can open a report and tell the customer how current he or she is on each project, and what pending and open change orders there are. Microsoft Solomon has sped up the time it takes to access data by at least 100 percent.”

Steve Heiderstadt, Vice President of Construction, BP Air Conditioning

The 9/11 tragedy in New York City impacted BP Air Conditioning on many levels, causing executives to postpone the deployment of a new system. In January 2003, the company resumed its plans for a new system, choosing two employees from each of its five departments to work with SIS on the implementation. Using a formalized methodology, the team developed a solution that would address each department's business requirements. In addition to Microsoft Solomon modules for financial management, distribution, field service management, project management, and accounting, the team identified the need for five custom modules. SIS developed the following modules using the Microsoft Visual Basic® version 6.0 development system, Microsoft FRx® Professional business software, and Crystal Reports.

Custom Reports

BP Air Conditioning uses a custom pay-when-paid process that manages the payment of subcontractors. To automate the process, SIS developed a series of custom reports. The module collects project information such as when subcontractors are paid, how much they are paid, and comparative data that shows a subcontractor's job completion percentages related to project ownership. Employees can access the information from one screen.

Integrated Lead Management

To support the established business processes at BP Air Conditioning, SIS developed this module to collect and track lead information such as its source, outgoing proposals, associated drawing packages, and win/loss statistics. The module ensures that only one estimator at a time works on any particular job. Additionally, managers can track the performance of estimates, comparing the number of bids provided to a contractor with the number of jobs actually awarded.

Submittal/Transmittal

By expanding the capabilities of Microsoft Solomon, this module manages the complex project notification process used by BP Air Conditioning. From a single screen, employees can quickly generate documents such as subcontractor agreements, call slips, or change orders. The module automatically forwards the documents to other team members, so they can take action.

For example, a project might require the installation of HVAC systems in four floors of a building. BP Air Conditioning receives a call from the general contractor stating the client just leased the fifth floor as well and is moving into the space in two weeks. From one screen, the project manager creates a change order and sends it to the service, distribution, and accounting departments. Within minutes, employees contract additional labor, order thousands of dollars of equipment, and schedule the delivery of additional HVAC units.

Service Dispatch

BP Air Conditioning wanted to customize the service dispatch provided with the standard implementation of Microsoft Solomon to share data from the nearly 1,500 labor transactions per week. This module automatically shares labor transactions entered in the dispatch screen with payroll.

Service Analysis Dashboard

Project managers analyze data from numerous modules within Microsoft Solomon, so the implementation team designed a service analysis dashboard to provide a single access point for each project. The dashboard includes buttons related to all aspects of a project, including open calls and required services.

The new system went live in August of 2003. Two years later, BP Air Conditioning decided to relocate from Brooklyn to a new facility in

Queens, New York. The move would take place over several months—temporarily spreading operations between two locations. To help facilitate easy system access, the implementation team began reconfiguring how employees use Microsoft Solomon. “We’re in the process of changing everyone over to Terminal Services,” says Lisa Caruso, Controller, BP Air Conditioning.

Benefits

By deploying Microsoft Solomon, the custom modules, Windows Server 2003, and SQL Server 2000, BP Air Conditioning has gained a project and financial management system that increases the visibility of project and financial data throughout the organization. Overall, employees are realizing benefits in financial management, data analysis, project management, internal communications, customer service, and productivity.

Accelerated Data Access by More Than 100 Percent

Before the deployment of Microsoft Solomon, employees spent considerable time looking for information, whether searching the database, perusing stacks of invoices, or calling other departments. Now, by simply clicking a button, people access the data they need. “I think one of the biggest benefits for us has been the access to live data,” says Caruso. “Being able to see data when we need it, and know we can trust it, has really changed how we do our jobs.”

Heiderstadt explains, “For instance, if a customer calls me and says I want to close this job, I used to hang up the phone, pull folders, look at spreadsheets, and call the person back after some time had passed. Now in a matter of minutes, I can open a report and tell the customer how current he or she is on each project and what pending and open change orders there are. Microsoft Solomon has sped up the time it takes to access data by at least 100 percent.”

“The service dashboard SIS designed meets our specific business needs,” notes Jack Fanneron, Vice President of Service, BP Air Conditioning. “By clicking one button, we can access information related to open calls, follow-up calls, or equipment maintenance. Anyone can readily see how many open calls and follow-ups we have per zone, how many open maintenances are left, and what service work needs to be done.”

Increased System Transaction Capacity by More Than 100 Percent

BP Air Conditioning had outgrown its old system. Employees had created workarounds to get their jobs done, including a reliance on manual document creation and the installation of standalone software packages. The disparity in processes and technologies was inhibiting productivity. “The service side of the business processes about 25,000 work orders per year between maintenance and billing,” says Fanneron. “Microsoft Solomon handles the volume without any problems. The integration between modules is so seamless that the volume is invisible to the user. The new system can easily handle over 100 percent more transactions than the old system.”

Dramatically Improved Reporting

Using the UNIX-based system, employees had to create reports using Excel spreadsheets, a time-consuming process affecting productivity. In addition, executives could not trust the accuracy of reports because the system did not contain real-time information. The new system integrates real-time data from various modules to create customizable reports including financial statements, service analysis, labor productivity, or WIP statements. “I can’t even measure the improvement in reporting because it has increased so dramatically,” Caruso says. “We now have the ability to access numbers in real time, know that they are accurate, and quickly generate reports that support the

numbers—making them identifiable and tangible.”

Increased System Performance by 50 Percent

By configuring workstations to access Microsoft Solomon through Terminal Services, system performance has increased an average of 50 percent. Processor size and variable software stacks no longer affect users' system performance when logged on through Terminal Services. Employees can also access the system from either Brooklyn or Queens, helping to minimize IT issues associated with moving to the new location.

Reduced System Service Calls by 80 Percent

Using Terminal Services has reduced system service issues by 80 percent. “Now that we are all running Terminal Services, we're not seeing individual system breakdowns,” explains Fanneron. “When we have system trouble today, it's because someone is working outside of Terminal Services.”

Sparking Innovation

With the help of SIS, the implementation team at BP Air Conditioning has achieved its initial IT goals. With a solid business process infrastructure in place, the team is taking advantage of the new system to implement other innovative technologies. Along with recently deploying Microsoft Solomon version 6.0, the company will soon deploy SpitFire, a third-party software package that provides document management and maintenance.

The team is also working with SIS to design a Web site using Microsoft Office SharePoint® Portal Server 2003 that will allow customers to access information about their projects. Another upcoming project includes the development of a software asset management solution.

“Deploying Microsoft Solomon has made us very aware of how important it is to have an IT budget,” says Caruso. “We now see the importance of being involved with our system, identifying the capabilities we need from it, and understanding what our system can do for us. I think one of the biggest benefits we've realized about Microsoft Solomon is that it can grow with us into the future. Its adaptability to provide the kind of reporting we need and support our changing requirements is just what we wanted.”

For More Information

For more information about Microsoft products and services, call the Microsoft Sales Information Center at (800) 426-9400. In Canada, call the Microsoft Canada Information Centre at (877) 568-2495. Customers who are deaf or hard-of-hearing can reach Microsoft text telephone (TTY/TDD) services at (800) 892-5234 in the United States or (905) 568-9641 in Canada. Outside the 50 United States and Canada, please contact your local Microsoft subsidiary. To access information using the World Wide Web, go to: www.microsoft.com

For more information about SIS products and services, call (678) 380-2267 or visit the Web site at: www.sisn.com

For more information about BP Air Conditioning products and services, call (718) 383-2100.

Microsoft Dynamics

Microsoft Dynamics is a line of integrated, adaptable business management solutions that enables you and your people to make business decisions with greater confidence. Microsoft Dynamics works like familiar Microsoft software such as Microsoft Office, which means less of a learning curve for your people, so they can get up and running quickly and focus on what's most important. And because it is from Microsoft, it easily works with the systems your company already has implemented. By automating and streamlining financial, customer relationship and supply chain processes, Microsoft Dynamics brings together people, processes and technologies, increasing the productivity and effectiveness of your business, and helping you drive business success.

For more information about Microsoft Dynamics, please visit: www.microsoft.com/dynamics



Software and Services

- Microsoft Dynamics
 - Microsoft Business Solutions-Solomon
- Microsoft Windows Server System™
 - Microsoft Windows Server 2003 Standard Edition
 - Microsoft SQL Server 2000 Standard Edition
- Microsoft FRx Professional
- Microsoft Visual Basic 6.0

- Technology
 - Terminal Services

Hardware

- Intel-based workstations
- HP ProLiant server computers

Partners

- SIS

© 2006 Microsoft Corporation. All rights reserved. This case study is for informational purposes only. MICROSOFT MAKES NO WARRANTIES, EXPRESS OR IMPLIED, IN THIS SUMMARY. Microsoft, Excel, FRx, Microsoft Dynamics, the Microsoft Dynamics logo, SharePoint, Visual Basic, Windows Server, and Windows Server System are either registered trademarks or trademarks of Microsoft Corporation or FRx Software Corporation in the United States and/or other countries. FRx Software Corporation is a subsidiary of Microsoft Corporation. All other trademarks are property of their respective owners.