



Taylor Ready for Even More Growth with Faster, More Efficient Service Centers



Same-Day Invoicing

down from 5 weeks



Warranty-Claim Processing

in one-third the time



Mobile Device

from four page
carbon copy



Reduced Spare Part Inventory

by over \$1M in the
first year

“ On the first day we went live, I got a call from a manager who was so excited, he had to tell me he just billed the customer before the technician was three miles outside the gate!

”

Michael Miller

Plant Manager, Distribution & Operations Center, Taylor Sudden Service, Inc.



Taylor's trucks are big

Taylor makes big lift trucks. Really big — right up to 100,000 pounds big. And with such big equipment to service, their technicians usually go out in the field to service that equipment, as opposed to bringing it in to a service depot. Over 90 direct field technicians operate from 17 Taylor service centers located around the southern states. This is in addition to the 29 dealerships that manage their own teams of service technicians.

"The Taylor family has been running this company for generations, and we consider our customers like family. They are treated the way we like to be treated."

Michael Miller
*Plant Manager, Distribution & Operations Center,
Taylor Sudden Service, Inc.*

Major growth for Taylor

Customer service often suffers when a company grows rapidly. And Taylor was starting to see a lot of growth — they went from 10 territories to 17 in just 3 years. In the last year alone, business has grown over 20 percent. Strong business fundamentals and a highly loyal customer base allowed them to capitalize on a recent boom in oil and gas.

The company made the move to streamline and standardize processes in their service centers before customer service declined or became too expensive. Previously, they were managing service by paper and telephone, and every dealer and service center had a slightly different way of doing things.

"We had four-page carbon copy forms that the technician used to have to fill out and drop off. It could take up to five weeks to send out an invoice. And that's if you could read the handwriting! Billing has gone from what could take four to five weeks down to less than 24 hours," says Miller.

RMB Solutions the perfect fit

Miller and his team set out to find the ideal system and discovered the RMB Service Management Solution. "Service management has everything we were looking for," he says. "It's an online, paperless solution, offers same-day billing, online warranty claims and provides an online resource for locating and scheduling technicians."



"Plus, we heard such rave reviews from their other customers, we knew we were onto something good," he says.

RMB Solutions wrote a custom integration so that Service Management could integrate tightly with the Taylor in-house ERP. Today, the solution allows them to track and log customer calls online, use online work orders and online warranty claims. Data now moves smoothly between Service Management, the service technicians' laptops/tablets and the ERP.

RMB Solutions also implemented online warranty claims for Taylor. Dealers, third parties and their own service centers can now send warranty claims through an online portal instead of by paper.



Better cash flow, reduced labor

Taylor is very happy they did. Processes are vastly improved, and invoices are now going out faster, accelerating cash flow and reducing errors.

"On the first day we went live, I got a call from a manager who was so excited, he had to tell me he just billed the customer before the technician was three miles outside the gate!" This is down significantly from the prior order-to-cash cycle, which included handwritten paperwork that had to be dropped off, entered again in the system, then billed.

"Billing has gone from what could take four to five weeks down to less than 24 hours," he says.

"The new system has helped us be more efficient in the office, there's no question. Our business has nearly doubled since we implemented, and we've only had to add one new resource to handle the growth."

Michael Miller
*Plant Manager, Distribution & Operations Center,
Taylor Sudden Service, Inc.*

While Taylor has grown dramatically, adding four new territories since implementing Service Management, the company has only had to add one more employee to manage the additional call volume.

The company is also getting cash in sooner with more efficient vendor claims. "It used to require an extra manual step to create vendor claims," says Miller. "Now all that data flows directly to the claim. We are definitely creating and sending vendor claims faster than we used to — and it's reduced a lot of work."

"We used to stock service vehicles with everything they might need during a call. Now we issue inventory to the vehicle based on the service calls scheduled. This reduced our inventory investment by over \$1M in the first year."

Michael Miller
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Tracking vendor quality

With all this data being documented and stored in a single location, the company can now conduct valuable analysis that previously wasn't possible.

Previously, knowing how much work had been done on a single truck would have required contacting the IT department for a special report, which could take days to mine the data in the ERP. Today all it takes is a quick query in Service Management for an instant view.

"We use this feature a lot when dealing with our vendors. Sometimes we have to replace a part more than once, and now we can easily show the vendor proof of that."

Better inventory management

More stakeholders now have a much stronger grasp of inventory for replacement parts. Previously, technicians kept large amounts of inventory in their trucks as a precaution. There was no real way of knowing which parts were on what truck.

Now, the company has a clear view of all their inventory, improving customer service and freeing up yet more cash.



"We don't want service techs driving around with \$30,000 worth of inventory in their trucks. We also don't want parts rolling around in our trucks for too long — it damages them," says Miller. With Service Management, Taylor is issuing parts to the technicians' trucks for the service calls that they will make during the course of the day. "Now we can run tighter inventory on trucks because we know what parts are where."

To track parts more accurately, Taylor needed to be able to allocate parts that had been used in a repair, but not yet billed, which could take up to two weeks in some cases. "We had no way of tracking inventory, especially for warranty work that had been installed but not billed. Now we know the exact status of that inventory," Miller says.

"Real-time, accurate inventory tracking has helped tremendously. Our trucks are running leaner, and we're much more efficient."

More efficient warranty claim management

Taylor also implemented an online portal for their dealers, so the dealer can submit warranty claims online instead of by paper. The new portal was met with initial skepticism by the dealer technicians, but they were soon won over.



"Dealers love the new warranty claim portal," Miller says. "It's really easy to use and it didn't require a whole lot of training. It used to take three weeks to process a warranty claim. Now, all submitted claims go before the warranty board for review by the following Wednesday. The dealers are very happy about that."

"It's good for us too, as we've eliminated all this manual work, and our staff now spends time on more valuable tasks like getting the right documentation in place before it goes for review."

Overall, Taylor is really pleased with the new system, and they've been especially impressed by the customer service they've received from RMB from the very beginning. "I've worked with a lot of vendors, and I have never seen a vendor like RMB," says Miller. "We have always received help in a very timely manner. If I have a problem, the majority of the time it gets fixed that day. Their service and their commitment to us has been unbelievable."

Improved, standardized processes, high quality accessible data, reduced labor requirements in the office and better cash flow: Taylor is now leaving all the heavy lifting to their trucks and ensuring it's ready for even more growth.

Year One ROI Pays for Service Management



We used to stock service vehicles with everything they might need during a call. Now we issue inventory to the vehicle based on the service calls scheduled that day. This reduced our inventory investment by over \$1M in the first year.

The service trucks used to carry a lot of inventory. We basically loaded them up with everything that a tech might need on a service call to cut down on the number of trips required to complete the service. Between the inventory in service vehicles and eight warehouses where we stocked service parts, we were holding way too much service inventory. In many cases we were ordering parts into a warehouse when we had several of those parts somewhere in the field. It was just not possible in a paper-based system to know what inventory was where.

We changed all that with Service Management. Now we issue inventory to a Work Order that is issued to a truck. We know exactly what is in stock in each warehouse and in every truck. We are essentially paperless and just-in-time regarding spare parts inventory. As the business grows, so does the service organization. We now have service parts stocked in 20 warehouses (up from the original 8) and continue to increase the number of service vehicles in the field. Our investment in service parts inventory would have become unacceptably large if we had not gotten it under control with Service Management.



Michael Miller

Plant Manager, Distribution & Operations Center, Taylor Sudden Service, Inc.

For more information

To get a personalized demonstration of how Service Management can help you improve profitability in your service department, contact RMB Solutions at sales@rmbolutions.net, 770-643-9284 or visit us at www.rmbolutions.net.