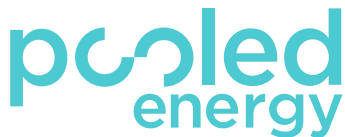


CUSTOMER EXPERIENCE

Pooled Energy



ABOUT POOLED ENERGY

Pooled Energy is an Australian company which has developed unique smart technology to automate your residential swimming pool to reduce household energy consumption, pool chemicals, and maintenance costs.

INDUSTRY

Smart Energy Solutions.

LOCATION

Artarmon, Sydney - Greater Sydney Region

EMPLOYEES

50 - 100 employees

FIELD SERVICE STAFF

30+

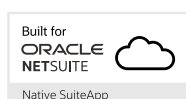
TIMELINE

- Installed NetSuite in early 2017.
- Installed NextService in 2018.



Business Challenges

- Started out using NetSuite Events and Work Calendars to manage field staff - inflexible solution and not designed to manage field service but they tried to make it work.
- The ability for users in the field to interact with the business was limited via NetSuite App.
- Scheduling - ability to move technicians' tasks around was very time consuming, lots of clicks, and also had to be done at Administrator login level.
- Data entry was done on laptops by technicians or phone back into the Schedulers or wait until they got home to do data entry. Missing things, delay in information
- Pooled Energy had written a mobile app to accommodate some of the shortcomings of NetSuite for locating customers but wasn't designed as field service.
- We had no real-time visibility of technicians in the field.
- Inventory - tracking parts and inventory where possible out of the warehouse but it was a clumsy process. We had no concept of truck inventory, and it was a very manual process to know exactly what was consumed on a job and what was invoiced to the customer.
- Previously creating calendar reminders for sales jobs (double data entry for inside Sales team to support Outbound Sales Team) (two sources of truth).



info@nextservicesoftware.com
Call (AU) 1300 60 44 22
(USA) 844 631 9110
www.nextservicesoftware.com

NextService.TM
Field Mobility



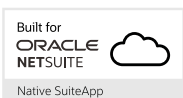
Why did you choose NextService?

“NextService enabled us to achieve a 25-30% increase in the number of jobs completed by each service person. Without NextService on board, we would not have achieved this goal”

We shortlisted down to two options during the evaluation process, and NextService was going to be able to provide real-time geo-location tracking of field technicians, which was important to us.

NextService was also the logical choice being on the NetSuite platform, ensuring that we could achieve process continuity out into the field and we wouldn't need to manage integrations to other softwares. Being Australian based was also very important to us for local implementation and support.

NextService also appeared to be a good fit for scheduling Sales Team appointments and offered the ability for both Sales and Service to quote on new customer opportunities or up-sells.



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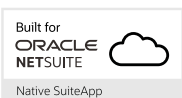
Business Impact Overall

- We can now report on accurate job attendance metrics, job costing, hourly time spent by technicians and billable time spent on customers (guesstimating previously).
- We implemented NextService at a time when the business was making lots of improvements to the Service team. NextService was certainly an enabler in achieving a 25-30% increase in the number of jobs completed by each service person.
- The biggest progress we made was being able to track jobs and capture billable items immediately against the job. This now means that no time is spent working back through email history to determine billables for customers.
- The Schedulers are more efficient, especially in our Sales department with both the Service Teams and Technical Sales Teams utilising NextService for work completion in the field.
- Invoicing faster and earlier and getting customer approvals more efficiently.

“NextService offered the ability for both Sales and Service teams to quote on new customer opportunities or up-sells”



25%-30% increase
in number of jobs
completed by each
service person.



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