

CUSTOMER EXPERIENCE

ThermFlo

THERMFLO

ABOUT THERMFLO

ThermFlo provides mission-critical thermal, electrical, and generator service for hospitals, data centers, office buildings, restaurants, and other commercial and industrial facilities.

INDUSTRY

Energy Solutions

LOCATION

Buffalo Grove, IL, USA

SERVICES

Thermal, Electrical, and Generator Services

SYSTEM SERVICE TYPE

Installation, Repairs, Maintenance

EMPLOYEES

135

FIELD SERVICE STAFF

55



Located in Buffalo Grove, IL, ThermFlo's 135 employees, including 55 field service technicians, offer mechanical and electrical services, engineering assessments, equipment sales and rentals, and preventative maintenance services.

About ThermFlo

Founded in 1969, ThermFlo provides mission-critical thermal, electrical, and generator service for hospitals, data centers, office buildings, restaurants, and other commercial and industrial facilities. Technicians are available 24/7/365 to maintain and repair equipment for ThermFlo customers in Illinois, Northwest Indiana, Michigan, and Wisconsin. Field installers are available to ThermFlo customers for projects nationwide.

ThermFlo is deeply committed to providing legendary customer service. The company puts its high standards for performance in writing and expects every employee to follow its 30 fundamentals to success. Just the first three speak volumes about ThermFlo's customer-centric culture:

1. Put yourself in the customer's shoes.
2. Do what's best for the customer.
3. Act with integrity.



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NextService.TM
Field Mobility



“ThermFlo has received incredible ongoing support to ensure the NextService for NetSuite solution continues to evolve and meet our ongoing business needs. ThermFlo has been well supported by Next Technik and Klugo in the evolution of the business solution.”

Janaye Avilez, Operations & Systems Specialist



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Business Challenges

ThermFlo’s strong heritage of superior service faced a growing internal threat: Outdated field service processes were impeding technicians’ responsiveness and productivity. Delays in emergency repairs for HVAC and power systems can have dire consequences, especially for temperature-sensitive environments in data centers, hospitals, and other life safety and mission-critical applications.

Major issues included:

- Field technicians lacked a unified technology platform to streamline their jobs. Manual workflows and cumbersome communications hampered their abilities to respond quickly to customer outages, make timely repairs, and report job time and costs accurately
- Dispatchers had little visibility into the technicians’ locations and the status of the jobs underway, hindering their ability to prioritize new jobs
- Without real-time, easily accessible information, ThermFlo employees previously used multiple platforms and interfaces to schedule service calls, order parts, schedule follow-ups, confirm commitments, and invoice clients

In addition, outdated technology, inefficient workflows, and hindered communications caused:

- Inability to share accurate information across departmental lines within the system
- Inability to produce automated, real-time metrics and reporting
- Delayed client deliverables
- Inability to track field technicians in real-time
- Incomplete work order submissions



Increased dispatching team’s efficiency by 30% to 50%

NextService.TM
 Field Mobility

Why ThermFlo Chose NextService + NetSuite Solution

ThermFlo executives concluded that NextService provided the best solution for the company’s major field service needs, appreciating that NextService is a one-platform solution within NetSuite, a world-class ERP solution.

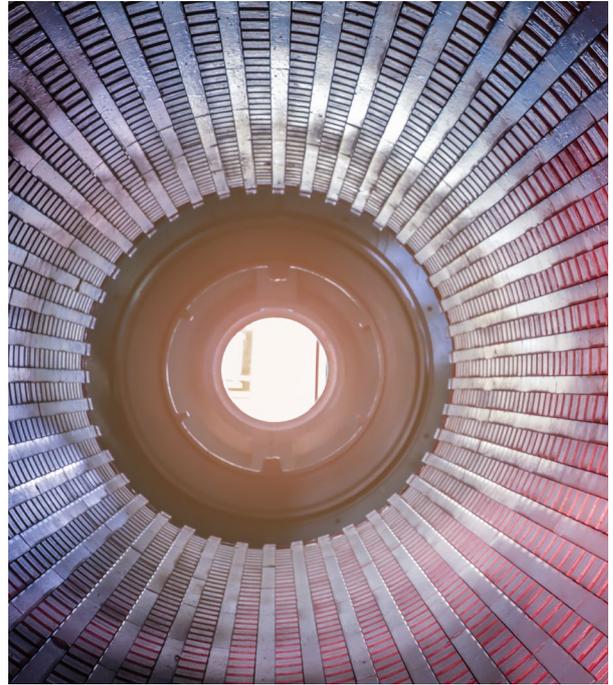
A unified, collaborative platform tying together all functions related to field service, from scheduling and dispatch to parts inventory, job time reporting, case completion, and invoicing.

Real-time mapping of technicians’ locations so that dispatchers can see their proximity to unassigned jobs.

A robust, easy-to-use mobile app to magnify the productivity of field technicians and give management accurate performance metrics for every job.

“NextService has a strong set of field service tools. The shining light is the mobile app. It lets technicians devote far more time to meeting customer expectations.”

Edward Nowakowski, Field Service Manager – Power Generation



Business Impact of Implementing NextService

In its first year of operation at ThermFlo, NextService processed more than 18,000 completed tasks—with an additional 23,400 tasks in the system booked out to 2023.

More importantly, users throughout ThermFlo report that NextService is making substantial impacts on field service management, communications, and financial reporting. Here are some highlights:

Scheduling and Dispatching

- Dispatchers can quickly determine where techs are, which techs are nearest to sites requiring emergency service, and what resources can be deployed for new assignments.
- Dispatchers no longer need spreadsheets to track activities, schedules, and locations of 55 technicians.



In the first year + than 18,000 tasks managed & completed



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“Technicians love the NextService mobile app. It put a halt to a lot of phone calls and extra work they had to do. They see it as a great tool that makes them more productive and helps them provide better customer service.”

Michelle Cruz, Operations Manager



Real-time information for dispatchers and 55 technicians



Accurate reporting of job time, eliminating 99% of data entry mistakes

Communications and Information Sharing

- All teams and departments now can view, share, and act on up-to-date information.
- Changes of all types have instant visibility across departments, saving large amounts of time and assuring everyone uses consistent information.

Technician’s Productivity and Safety

- Techs now have real-time access to crucial information, such as past repairs, recommended maintenance, equipment specifications and manuals, and parts inventories.
- Service teams view and share information through NextService, eliminating delays and huge numbers of time-wasting phone calls and emails.
- Checklists help assure thorough, consistent performance, with safety checks required at the outset of each job.
- Field work has been streamlined with the introduction of electronic case completion forms.
- Technicians can add before-and-after photos to document actions taken and needs for future maintenance.

Financial

- Invoices automatically account for job time on site, warranty items, and parts consumed.
- Management now has better information for pricing and project costing decisions.
- All system users can view the complete history of any client project, site, or asset.
- Accurate, real-time information means faster invoicing and faster payments.

“The more we use NextService, the more efficiencies we discover and the greater ROI we are achieving..”

Stephanie Scott, Chief Operating Officer



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Key Business Outcomes for ThermFlo

ThermFlo needed modern field service technology to match its high standards for providing legendary customer service. Here are the challenges ThermFlo overcame, coupled with the results it has seen since implementing NextService.

Challenge	Outcomes
Antiquated processes eroded the productivity of service teams	<ul style="list-style-type: none"> • Automatic scheduling of regular maintenance reduces downtime. • Manual clerical efforts and redundant activities eliminated. • Faster arrival and job completion improve the customer experience.
Staff and technicians relied on phones and email to get crucial information.	<ul style="list-style-type: none"> • Paperless processes save time and eliminated many data entry errors. • Mobile app gives field technicians instant access to accurate information.
Dispatchers lacked visibility into technicians' locations and job status.	<ul style="list-style-type: none"> • Visual mapping of technician locations and sites needing service provides quick insights. • Dispatchers enjoy easy set-up and prioritizing of new jobs. • Real-time job status updates are readily available.
Cash flow was delayed by manually compiled invoices.	<ul style="list-style-type: none"> • Information automatically flows from work orders to invoices • Invoicing occurs sooner and with less effort, resulting in faster payments.
Executives needed more robust tools for work and resource forecasting and big picture insight.	<ul style="list-style-type: none"> • Departments gain full visibility into financial and service metrics. • Consistent, aggregate information creates better reporting.



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