Cardiac Services Mobility Solution

Case Study

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The Cardiac Services Group, founded in Belfast in 1969 are at the forefront of supplying and supporting diagnostic and measurement equipment in Ireland and the UK. Cardiac Services became part of the SISK GROUP in August 2006 and operate under the umbrella structure, SISK Healthcare.

Sysco revisited the project with the team at Cardiac Services as part of a wider case study series on the project implementation and ongoing benefits to Cardiac Services, their customers and their field service engineers from using the mobility solution daily.

Although Cardiac Services had achieved significant operation gains from implementing Microsoft Dynamics NAV they still faced certain challenges in the delivery of servicing contracts such as:

> Engineers where having to get documents signed and bring them back into the office a couple of weeks later to scan and input the data into Microsoft Dynamics. The result was that it would take between 4 and 8 weeks for an invoice to be issued to a customer.
>
> **Richard Ellis - Service and Education Director, Cardiac Services**

- Workflow delays in providing customer reports and business invoices.
- The field service engineers largely used paper based records while healthcare customers were increasingly requesting electronic service reports.
- The completion of paper based reports in the field was considered unprofessional and was not time efficient.
- Data entry duplication of Field Service Engineer Service Report Information within Microsoft Dynamics NAV.
- Live status of servicing activity was not reflected in Microsoft Dynamics NAV causing confusing and workflow delays.
- Manual fulfilment of increasing complex compliancy needs from regulatory authorities and key principals.

These challenges caused backlogs within Service Support Teams and limited the growth of the company. Thus, Cardiac Services turned to Sysco with a specific set of requirements for a Microsoft Dynamics NAV Mobility Solution for Field Service to resolve these challenges. Requirements that would integrate directly with Microsoft Dynamics NAV to facilitate:

- On-Site Equipment Servicing
- Parts Assignment
- Engineer Callout Service
- New Equipment Installations
- Training Processes
- Customer Signature Signoff
- Automated E-mail Invoice & Worksheets to Customer

- Van to Van Equipment Transfers
- Remote On or Offline Access to Microsoft Dynamics NAV

Following due-diligence of competing solutions, Sysco Software Solutions were chosen based on several factors:

- Experience with web service mobility platforms including the compatibility of operating systems
- Experience of integrating with Microsoft Dynamics NAV
- Proposed a solution matched to the required functionality
- Had the support infrastructure in place during the design, go-live and post go-live phases
- Enabled future flexibility in the application development and customization

Once appointed, Sysco in partnership with Cardiac Services and SISK IT created a robust project governance model to actively support the role of Cardiac Services in project managing the implementation whilst guiding and recommending alternative options during the creation of a detailed design and specification document.

The benefits of the solution were felt across the organisation from the field engineers, to the service desk to an executive level.

> We had our project team and Sysco had their project team. The two teams worked really well together. Nine months later we had a finished product and were delighted that it ticked all the boxes that we required. It has been in-play now for a year and we are very happy with the outcome. Our customers are absolutely delighted.
>
> **Richard Ellis - Service and Education Director, Cardiac Services**

Field Service Benefits included:

- Easy to use and record data
- Pre-populated fields eliminations data replication
- Professional look and feel
- Familiar user interface
- Customer sign a tablet to confirm work completion
- Field based ordering and reordering of parts
- Automated PDF generation for customers within 15 minutes of completion
- Accept / Refuse Jobs
- Log and Review Worklogs
- Works even when there is no internet connectivity
- Reduced paper handling and document scanning
- Generated efficiencies of 15%

Help Desk Benefits included:

- Much improved control over service job assignments
- Control dashboards very easy to use
- Familiar user interface
- Complete removal of data duplication – 100% removal in Microsoft Dynamics NAV saving 1.5 days per week
- Timely customer invoicing from job completion – to date 30% improvement
- Timely job completion – to date 60% improvement. Field service Engineers have the control, accuracy and completeness due to pre-population
- Much improved stock management capabilities

> Internally, there were massive efficiencies if we look at the service support desk there was no duplication anymore. Timeliness; when we were asking an engineer to go on site we had immediate feedback. Are they available, are they not available? We knew when they were finished with jobs.
>
> **Richard Ellis - Service and Education Director, Cardiac Services**

Executive Service Management Benefits included:

- Customers pleased with Electronic Reports
- Ease in meeting increasing complex compliancy obligations
- Better accuracy in job completion statuses based on information passed directly from Microsoft Dynamics NAV
- Accurate information of Field Service Engineer resources
    - Time spent on site
    - Time travelling between sites
- Reduced cost with the elimination of document scanning by outsourced provider in the region of €2900 per year

What's next for Cardiac Services and the Sysco Mobility Application?

The mobility solution at Cardiac Services is integral to their everyday working processes. The solution has now been customized and scaled for training purposes and for educating personnel. The next steps would be in the direct integration with customer's healthcare systems on ECRI – AIMS.

> We can now see what's happening in a much, much shorter timespan than it previously was. With our old systems, we didn't use the term real-time… and we've probably saved a few forests as well.
>
> **Richard Ellis - Service and Education Director, Cardiac Services**

The Sysco mobility solution is also being scaled to Cardiac Services sister company Tekno Surgical. Cardiac Services also intend to add bar coding functionality for capital equipment and service stock for validating equipment and parts.