Case Study

Centra Windows Inc.

Windows Manufacturer Expands Operations with Flowfinity

Challenge

Replace a paper system for job dispatching, materials management, time entry and scheduling with an automated, mobile solution that reflects the company's current business processes and integrates with other systems.

Solution

Flowfinity Actions was selected to replace paper forms and manual procedures with a dynamic workflow system accessible from both head office and mobile apps installed on field staff's smartphones.

Results

- More efficient operations; reduced overhead
- Better visibility into operations to support decision-making
- More transparency and accountability for staff
- Improved customer service

"Flowfinity and Centra have a good partnership. It's one of our core technologies and is key to us moving forward. Their service and support has been fantastic."

– Garett Wall, CFO, Centra Windows

Success with Flowfinity

Company: Centra Windows Inc.

Region: Americas

Company Size: Medium Enterprise

Industry: Construction

Function: Field Service, Dispatch Operations, Scheduling, Reporting, Timesheets

Flowfinity

The Challenge

Centra Windows Inc., a windows manufacturer and installation company, wanted to replace a manual paper process for job costing, scheduling of installation crews, and managing on-site projects. With over three quarters of their staff in the field, Centra knew that mobile technology was key to improving productivity and reducing administrative overhead.

Manual paper processes were causing delays in communication between departments, branches and head office, were error-prone, and did not provide an accurate up-to-the-minute snapshot of the status of jobs. Centra needed a solution that would allow them to:

- Replace paper forms with mobile forms on smartphones to eliminate manual data entry and improve data accuracy
- Speed up job costing and streamline scheduling in order to better plan and control costs
- Improve communication between departments, eg. Manufacturing and Installations
- Automate their proven existing business processes and workflows without having to modify them

To achieve these goals, Centra needed robust and flexible mobile technology that would support the rapid growth of their business.

Solution

Centra selected Flowfinity Actions to rid themselves of paper and manual inefficiencies. They liked Flowfinity Actions because of its ease of use, extensive workflow capabilities, and ability to adapt to their existing business processes.

Automated job costing eliminates paper forms and delays

Centra decided to use Flowfinity to speed up and improve the accuracy of job costing. Previously, paper forms were used to record materials and time, which all had to be verified. With this process, it could take up to 2 to 3 months to cost a job.

"Before, we used to wait until end of the month, and then do a whole month's worth of work," says Garett Wall, CFO, Centra Windows. "Job costing was simply taking too long."

With Flowfinity Actions, Centra has implemented daily workflow and reduced the job costing cycle to 15 days. Now, once a job is complete, head office can start costing the next day.

"Our main objective was automated job costing with less manual activity going back and forth, and that has definitely occurred," says Wall. "The new system speeds up costing, which allows us to make better decisions for future jobs."

> *"One of the benefits of Flowfinity is the instant costing reports it is capable of producing upon completion of a work order, allowing managers to assess job performance immediately."*
>
> – Ed Vandermeer,
> VP of Customer Service, Centra Windows

Flowfinity

The end to paper timesheets

Previously, Centra employees used manual timesheets, which made reconciliation and verification of job costs difficult and inefficient. Now, time is entered directly into Flowfinity Actions on installers' smartphones, which automatically calculates overtime, double-time and vacation and can be submitted immediately to head office for approvals. Reports are then automatically generated for input into the payroll system.

"Before we would have to double-check every time sheet, add up the time by hand, then manually compare to the costing records to make sure all of the costings had been posted correctly," says Wall. "Flowfinity Actions eliminated all that, which alone has saved us one full-time position."

Centralized scheduling improves crew management

After automating job costing, Centra saw an opportunity to improve scheduling of installation crews, migrating from a local branch-level activity to a centralized system managed from head office.

Centra worked with Flowfinity to develop a scheduling system portal that allows the users to interface from the field and update the scheduling system, and the schedulers or managers in the office to easily communicate with other departments.

"Scheduling was all manual before, recorded on hand-written desk calendars, and relying heavily on each manager's input," says Wall. "Now scheduling all of the service calls from across the province is handled from head office. This gives us an accurate snapshot of where everyone is in the field, and allows us to deliver better customer service by responding to service calls faster."

"The Flowfinity scheduling calendar is an invaluable tool, allowing managers to maximize available manpower by adjusting the schedule as the days and weeks progress."
– Ed Vandermeer, VP of Customer Service, Centra Windows

Flowfinity

Why Flowfinity

Centra selected Flowfinity because of its ability to adapt to their business processes, instead of having to change their processes to match the technology.

"Flowfinity allowed us to automate and move our proven business processes to a mobile, efficient system," says Wall.

Transparent workflow increases visibility into operations

Centra also saw an opportunity to use Flowfinity's workflow tools to improve their business processes. As the company was quickly expanding and opening new branches, they looked to use Flowfinity Actions to efficiently replace faxes and automate approvals going back and forth to head office.

With installation, service, job costing, and scheduling managed in Flowfinity Actions, the status of each task and where it sits within each process is transparent. Now as soon as a job is complete, head office can determine whether it's been costed or not, and whether it's been invoiced yet.

"Flowfinity's real benefit is workflow. The workflow capabilities of Flowfinity Actions allowed us to create those 'moving filing cabinets', hold people accountable, and know where everything sat in every process all the time," says Wall. "This created an environment of accountability for our staff."

The Manufacturing and Installation departments also use Flowfinity to collaborate. Now, instead of phone calls and emails, Manufacturing inputs the status of jobs directly into Flowfinity Actions, so that installation schedulers know the status of each manufacturing job at all times.

"The electronic flow of information supported by Flowfinity allows redirection of files and reports between departments, with no chance of losing information and no interruption to the intended user," says Ed Vandermeer, VP of Customer Service, Centra Windows.

"We use Flowfinity as a key communication tool between our departments. Instead of phone calls and emails, it's all centralized in Flowfinity Actions."
– Garett Wall, CFO, Centra Windows

Flowfinity

Business Impact

- Reduced administrative overhead through elimination of paper

- Less management cost per employee through automating key processes

- Lower job costs from more efficient manpower scheduling

- Ability to grow by scaling proven business processes to newly opened branches

- Reduced working capital requirements through just-in-time manufacturing

Future

Centra sees the opportunity to expand the use of Flowfinity Actions to their Exteriors and Restorations business units. "Centra IT department has been instrumental in working with and growing Flowfinity for Centra, and we expect this partnership to continue," says Wall.

"We are building a centralized system that's very expandable. We invested in this system because we knew we were going to grow," he says. "Our use of Flowfinity Actions has expanded ten-fold since we first implemented it, and as a company we've grown exponentially. What this allows us to do is use the same concepts and processes as we continue to open more and more branches."

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