



## Mobile Solutions: Increasing Small Business Capabilities without Adding Overhead

It's a common predicament for many small companies. Business is growing, but so is the amount of work coming in. To handle more business without adding overhead, companies have to get more efficient, and in some cases, more creative.

### Excell Refrigeration in South Carolina

The 20-year-old company has grown steadily by providing construction and repair services on large refrigeration systems in supermarkets and other commercial enterprises. As Excell's business has grown, so has the paperwork. Excell has a four-person office staff to support 21 field technicians, who bill customers on a time-and-material basis. The company considered hiring another administrative worker to handle the growing amount of paperwork, but that also meant a 25% increase in Excell's non-revenue-generating workforce.



### Excell gets creative

Like many small businesses, Excell turned to technology to increase its operating efficiency. Excell President Glenn Taylor and Service Manager Mike Driscoll had already implemented a leading software solution in the back office for service management, dispatching, and billing. Their next step was to find a way to apply those same efficiencies to the field technicians. Not only could this eliminate the need for an additional administrative position, it could also give

### Excell a competitive edge by improving customer service.

To increase efficiency in the field, Taylor and Driscoll knew they would need to find a mobile technology solution. First, they did their homework, confirming that their back-office software included mobile capabilities. Then they started looking for mobile devices that could support their dispatch, reporting, and billing operations.

### Going rugged

Early on, Taylor and Driscoll determined that any mobile devices they used would need to be rugged. "Refrigeration repair technicians working in and around mechanical rooms need

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rugged devices that can withstand some abuse,” Taylor said. “It’s not that the techs don’t care for their equipment—but it’s a work area, not an office.”

Based on this requirement and other considerations, Driscoll and Taylor came up with a solution using a Recon rugged handheld computer from Trimble and an MtP400 mobile thermal printer from Printek Incorporated.

The Recon rugged handheld gives Excell technicians multiple capabilities in a compact, extremely rugged package. For instance, Excell added GPRS to one of the Recon’s two CompactFlash slots so technicians can receive their work orders wirelessly. The Recon’s CF slots give users flexibility in customizing each handheld as needed. Currently, Excell uses an off-the-shelf solution for wide-area access using GPRS cards. But according to Dale Kyle, rugged handheld product manager at Trimble, “they can also reconfigure the Recon’s mobile computing platform later if they need a different solution, such as a vehicle-area network using a mobile Wi-Fi hotspot.”

Taylor and Driscoll chose the Printek MtP400 mobile thermal printer for its features as well as its rugged design. “Not only has the printer been dropped from four feet up, it rolled six feet after the fall,” Driscoll said. “Accidents happen, but these devices keep on working despite them.”

The MtP400’s 4-inch format and 80-column capabilities were also key selling points. “Our previous field documentation was in a full-page format,” Driscoll explained. “We didn’t want to put a lot of effort into redesigning the forms. The 80-column format on 4-inch paper allows us to just shrink down our old forms without major changes.”

### **Adding efficiency and speed to service**

The key to a mobile solution’s success, of course, comes with its users. Excell’s technicians like the new setup for its ease of use and efficiency. Choosing from drop-down menus on the handhelds, they can quickly enter parts they use during a service call. This process alone has eased the office workload by greatly reducing transcription errors in recording the parts used. At the end of the call, the technician can enter the work completed using drop-down menus and pick lists, then print a detailed customer receipt on site.

“We’re a time-and-material business,” Driscoll said. “We need the flexibility to print receipts for our customers that are accurate to the work actually done. This speeds billing by automating the captured information as well as payment by reducing questions and exceptions.”

Because Excell is a service business, Taylor and Driscoll know how important it is to respond quickly when a customer has a problem. So customer service was also a factor in choosing mobile solutions from Printek and Trimble. “Just the fact that Printek was willing to provide an evaluation printer to us with no upfront charge made a difference,” Taylor said. “Mike Driscoll calls me Mr. Cheap, but we respond to a company that wants to build a relationship as much as make a sale.”

Driscoll has also found an additional creative way to apply the new mobile solution. To ensure Excell customers’ satisfaction, he regularly visits their stores and creates punch lists of

concerns and corrective actions for the techs to address. No surprise—Driscoll creates the punch lists on the Recon and prints them out on an MtP400 mobile printer.

## Saving money

Excell has proved that well-planned, correctly applied mobile solutions pay off. Driscoll estimates a 12- to 18-month ROI. Considering TCO (total cost of ownership) factors, the payoff should be even faster. “Smart companies recognize that rugged devices offer much lower TCO in mobile solutions,” said Trimble’s Kyle. “Once downtime repair and replacement costs are considered, there’s no question that rugged handhelds and printers are the most cost-efficient devices for field service.”

Scott Barnett, VP of Sales and Marketing at Printek, concurs and adds more insight. “Supply costs like pre-printed forms, ink cartridges or ribbons add up over time,” he said. “Mobile thermal printing cuts those costs to the bone. Additionally, Excell has gained the soft benefits of improved interaction with their customers via more accurate receipts and fewer billing disputes.”

No matter what the payoff, Driscoll and Taylor are happy that they achieved their goals and had a fast, smooth rollout. “We picked two of our more computer-savvy techs to test the solution at first,” Driscoll said. “Once the bugs were worked out, we rolled it out to the other field techs. Even those who are not avid computer users have found it easy to use and beneficial. None of them would ever want to go back to the old way of doing things, with manual paperwork and telephone dispatching. The time savings and efficiencies have just been too great.” With their creative, efficient application of mobile technology, Excell never had to hire for the extra administrative position.

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