



# WENN SOFT®

## CASE STUDY

## Seiberlich Trane

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Ron Hess, CFO for Seiberlich Trane

### Overview

**Country:** United States  
**Industry:** Mechanical Contracting

### Locations

Headquarters is in New Castle, Delaware

### Scenario

- ◆ Their business software system had become obsolete and was no longer being supported
- ◆ Looking for solution that provided excellent service management, mobility and job costing

### Solution

Purchased WennSoft Job Cost, Service Management Series, MobileTEC and Microsoft Dynamics® GP complete business solutions

### Benefits

- ◆ Everything in the field is handled electronically
- ◆ Technicians are more productive
- ◆ Less administrative overhead
- ◆ Simplifies inter-departmental transactions

### Business Impact

- ◆ Decreased the time it takes to close work orders by 5 days
- ◆ Saves company approximately 830 hours annually in unnecessary administrative data entry
- ◆ Reduced time it took to post payroll to jobs by 2 weeks

### About Seiberlich Trane

Seiberlich Trane is a leading provider of residential heating, air conditioning and commercial HVAC solutions that reliably improve indoor environmental quality. The company provides energy efficient commercial air conditioners, chiller systems, HVAC controls, HVAC parts & supplies, and building automation systems that contribute to sustainable building design. Seiberlich Trane partners with building owners, engineers and contractors with services for HVAC system design, HVAC service, temporary cooling, chiller upgrades, performance contracting, advanced building controls and financing solutions.

Seiberlich Trane employs 70 associates including 24 highly specialized service and BAS technicians. The company has exceeded \$20 million in revenue with over 130 commercial service contract customers maintaining both equipment and controls systems. The company maintains sales and service associates in locations to serve northern and southern Delaware, the eastern shore of Maryland, and southeastern Pennsylvania.

### Replacing an obsolete system

Seiberlich Trane was looking to replace their software solution, which had become obsolete and was no longer being supported. They began researching different software solutions when they learned that the Trane Company was planning on using WennSoft for their service package. Since they will be purchased by the Trane Company eventually, Seiberlich Trane wanted to have a similar software package.

In 2002, Seiberlich Trane purchased WennSoft Job Cost and Service Management Series. Job Cost enhances organizational accountability by tracking and managing labor, materials, subcontractors, billing, P.O.s, and other related items. Service Management Series improves organizations’ field service by capturing service calls, dispatching assignments, tracking resolutions and managing contracts.

In 2008, they purchased WennSoft MobileTEC. MobileTEC enables field technicians – who are either online or offline – to update schedules, record expenses, create purchase orders, manage scheduled maintenance and review back-office information via PDA, laptop, or tablet PC.

### MobileTEC

Seiberlich Trane started using MobileTEC this summer. Now, everything they do is electronic. The service technicians in the field enter information into the computer directly and it goes right to payroll and inventory. Also, the work order goes directly to the client by email without having to send a hard copy.

Having MobileTEC has decreased the time it takes for Seiberlich Trane to close work orders. It used to take a week to get work orders ready to be reviewed and billed because of the time necessary to reconcile the parts. Now that they are using MobileTEC, the work orders are closed as soon as the technicians signs off in the field. It’s just a matter of having the service

administration review the orders and the billing department get them sent out.

“We can’t believe the benefits we’re seeing with MobileTEC,” said Ron Hess, Chief Financial Officer for Seiberlich Trane. “The productivity of our technicians has been better than we ever anticipated. MobileTEC makes our technicians much more efficient.”

#### **Elimination of Duplicate Entry**

Before they had WennSoft MobileTEC, performing transactions between the parts and service departments was very inefficient. Parts used by the technicians were entered once by the parts department and then again by the service department who would create the work order. In addition, the technicians had to account for all the parts they used. This was time consuming because technicians were recording the parts manually, which meant the service department had to review the technician’s documents and reconcile the parts.

“It was very inefficient because parts handling was always a mess,” said Hess.

Now that they have MobileTEC, parts information is entered into the system once and the entire organization can access it. When the technicians order a part, the parts department puts it into the work order and it automatically gets posted to MobileTEC. The technicians in the field can see the parts that they are using, so all they have to do is enter the work performed and their time.

“WennSoft saves our company approximately 830 hours annually in unnecessary administrative time because we’re not entering parts information twice,” said Hess. “That’s a big deal for us.”

They also have a Sales Order Processing (SOP) Module that was written for the Trane Company, which offices that have WennSoft can use to manage transactions between the parts and service departments. When the service department uses parts, the SOP Module automatically adds a mark-up to the service work order, eliminating the need for the service admin having to re-enter the information.

#### **Percent of Completion Reports**

Seiberlich Trane used to have difficulty determining the monthly Percent of Completion (POC) for each of their jobs. They would have to go through a complicated manual process where they produced POC-close reports for different months and compare the two. They would manually determine the difference between the two reports, which was time consuming.

WennSoft provided Seiberlich Trane with a report that automatically breaks out the POC transaction per month and helps them determine exactly where they are on each job.

“That’s a great report because it makes it much easier for us to do our job,” said Hess.

#### **Better Cost Management**

Before WennSoft, they had a hard time determining department profitability due to the lag time in payroll. Since they used to do payroll manually there was a two-week delay before labor was posted to a job. Therefore, project managers never knew in real-time how they were performing on a job.

“We looked at the various jobs like buckets. At the end of the day, we were lucky to be profitable when all the buckets were combined,” said Hess.

WennSoft Job Cost enables Seiberlich Trane to post labor immediately to the job, which gives project managers real-time access to information and provides greater control over their projects and jobs.



### About WennSoft

WennSoft, a Microsoft Gold Certified Partner, provides innovative business management solutions for public and private sector organizations focused on project management, field service and equipment/fleet management.

WennSoft services include assessment, training, implementation and go-live support. With more than a decade of experience in delivering superior applications in the field service and construction industries, WennSoft is the solution provider of choice.

“It’s easier to achieve profitability on our jobs because we don’t have a two-week lag time preventing us from knowing what’s actually going on,” said Hess. “WennSoft gives us greater control over each and every job, which ultimately gives us greater control over our bottom line.”

To learn more about how WennSoft Solutions can have a similar impact on your organization, please contact us at 262-821-4100 or [info@wennsoft.com](mailto:info@wennsoft.com).

