Case Study

Integrated Digital Pens Transformed
Finning into a Real-Time Powerhouse

To keep customers moving, Finning's vehicle service teams conduct ongoing equipment inspections and preventative maintenance in remote and rugged locations, generating large amounts of paperwork. With a vision to reduce or eliminate paper and to capture accurate field information "as it happens," Finning set out to explore the promise of a digital world.

About Finning

As the world's largest Caterpillar equipment dealer, Finning sells, rents, and services heavy equipment and engines to help businesses maximize productivity. Their customers run mission-critical equipment in harsh and isolated locations ranging from the oil sands in Alberta to forests in Chile.

Finning's Challenges

Manual data entry into back-end systems meant service technicians were under-utilized performing non-billable tasks. Increased errors, reduced accuracy around equipment and customer status contributed to longer cash flow cycles. Management had limited visibility into the overall health of the company.

Equipping field technicians with laptops was one suggestion; however, remote workers are not skilled computer users and errors would still be high. There was also a significant cost associated with procuring the rugged computers required in remote territories.

The Solution

Finning selected a high-tech digital pen solution that enabled field service technicians to work as they have always worked. While it feels the same to the Finning employee, this instrument actually captures 300 images per second, storing them in memory and sending the data out using Smart Phones.
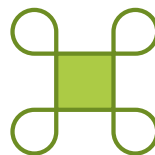
Business process and technology specialists collaborated to help Finning complete the picture by integrating the data across the Finning SharePoint platform and into the Finning payroll and billing systems. PDF files providing permanent records of the original handwriting are tagged and stored in SharePoint, making them easy to archive, search and retrieve.

The Rewards

In the past, it could take up to five months to process a single piece of information. Without the requirement for double-entry, service crews can spend more time on billable tasks. Finning has real-time visibility into their customer accounts and repair teams. The central office can immediately start the billing process for services rendered, keep payroll records up to date, and streamline account reconciliation. There's no more month-end scramble, invoices slipping into future months, or confusion over missing paperwork.

Real time visibility into customer accounts	Streamlined account reconciliation	More time for billable work

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> We can now efficiently track the service paperwork for our planned approach to scheduled services, proactive maintenance and repairs, so customers can minimize unplanned downtime and get productivity when they need it.
>
> **Customer Services Manager,**
> Finning