

A Jolt Consulting Group Case Study

Spencer Technologies

Field Service Software Selection,
Deployment, and Implementation

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Redefining Core Business Operations

Spencer Technologies provides IT networking and POS configuration solutions to top restaurants and retailers. In business for more than 40 years, the Spencer team is expert at keeping their customers' hardware, software and networking systems current with the latest technologies. Spencer Technologies employs more than 225 employees and 150 technicians at several strategic locations throughout the United States. These experienced retail and technical experts support consumer-focused businesses across the U.S. and Canada. From technology rollout and deployment, to POS and network configuration, to complete project management, to 24x7x365 maintenance and repair service, Spencer Technologies supports its clients' complete technology needs.

Spencer Technologies

Spencer Technologies is a facilities services company headquartered in Northborough, MA. Spencer Technologies delivers solutions to the nation's top restaurant and retail companies in more than 60,000 locations across the US and Canada. The company's 150 field technicians and 550 Spencer Certified Partners routinely handle more than 65,000 calls per year.

Challenge

After several years of system challenges, coupled with new business growth and increasingly demanding business requirements, Spencer decided it needed to replace its mobile workforce management system. So, Spencer Technologies embarked on a search for a replacement for the system they had been using, which was known internally as "Swordfish".

The new system would be required to support and empower Spencer's entire mobile workforce across a variety of business operations:

- ❖ Work order management
- ❖ 24 by 7 break-fix service and repair operations
- ❖ Project management
- ❖ Service spare parts and logistics processes at more than fifty locations
- ❖ Geographically dispersed dispatch functions
- ❖ And, it would need to integrate seamlessly with Spencer's other business systems to drive and update financial and payroll information.

The selection and implementation of this new software solution would have a profound effect on Spencer's operations going forward, so the company decided it needed to engage an outside firm with the appropriate experience and expertise to help with the identification, selection, and implementation processes. Spencer wanted a partner with deep software experience and extensive customer support and field service operations background. Spencer identified Jolt Consulting Group as the only consulting company with experience and knowledge required for this critical project.

Solution

Jolt Consulting Group (hereafter JCG) was engaged to provide both software and domain expertise throughout the lifecycle of the project. Jolt's activities and responsibilities included:

- Identifying and prioritizing Spencer's business requirements
- Managing the vendor identification, evaluation, and selection process
- Negotiating of contracts and a statement of work with the preferred vendor
- Risk and potential pitfalls assessment
- Software implementation leadership
- Comprehensive Project Management.

JCG interviewed Spencer personnel, observed the current Swordfish mobile workforce management system in production, gathered and reviewed existing business process requirements and documentation, and identified and recommended appropriate process improvements. This information served as the foundation for the development of a Request for Proposals (RFP) that was specific to Spencer's unique requirements. JCG then helped identify



the most appropriate service and work order management software vendors and issued the comprehensive RFP to that select set of vendors.

JCG managed the entire vendor selection process:

- ✓ Hosted vendor Q&A sessions
- ✓ Prepared demo scripts
- ✓ Coordinated vendor responses
- ✓ Developed a scoring mechanism for rating vendor responses and capabilities
- ✓ Recommended vendors for the short-list
- ✓ Facilitated on-site demonstrations
- ✓ Assisted Spencer in identifying the preferred vendor - IFS/Metrix.

Jolt then worked closely with both Spencer and IFS/Metrix to negotiate a statement of work and contract terms that minimized the overall risk for Spencer. JCG also collaborated with Spencer in the development of a detailed implementation plan. This comprehensive plan included a high-level architectural blueprint for both the deployment and integration of the new solution, and a final, mutually accepted statement of work.

JCG provided complete project management oversight and leadership using Jolt's proprietary implementation methodology, which ensures that projects are completed within specified time, effort, and budgetary parameters. JCG also developed and employed realistic and comprehensive project plans and work schedules, managed the opportunities and risks associated with the project, oversaw issue resolution, and controlled the change management process.

Results

Jolt Consulting Group identified several process changes leading to significant improvements in efficiencies and streamlining of operations.

The rigorous vendor selection process, clear functionality requirements and JCG's experience across a wide variety of solutions platforms led to the identification and selection of the vendor and solution that best fit Spencer's strategic and business objectives.

A Spencer project cost savings of 27% resulting from Jolt Consulting Group's clearly defined vendor statement of work and negotiation of contracts.

The IFS/Metrix solution implementation and go-live was completed on time and under budget. These impressive results were achieved in spite of a 25% reduction in core team resources and a 15% compression of the project timeline, both of which were necessitated by an unforeseen but happy growth in Spencer's business during the course of the project.