

FieldConnect

FieldQuotes delivers rapid returns!

The Company

Tampa Bay Trane, is a large Florida-based Heating, Ventilation, Air Conditioning and Refrigeration (HVACR company founded in 1969.) Tampa Bay Trane has grown to employ 100 field technicians in its service department, along with another 40 in its controls department. Their service offerings range from digital temperature control systems, start up and first year warranty service, to preventative maintenance, energy analysis, and 24-hour emergency repair service.

The Challenge

Tampa Bay Trane technicians often saw additional work opportunities while servicing equipment at customer sites. They presented their recommendations to their customers, who in turn, requested Tampa Bay Trane to quote the additional work. The quoting process took too long. "Techs used to send in leads with pictures, estimates and work scopes. Then our estimators would quote it, send it to our sales associates and the sales staff would follow up with our customers. Under the best circumstances, this would take 24-48 hours" says Tampa Bay Trane General Manager, Tim Barnes.

Delays in quoting appeared to have a negative impact on sales. Tim believed that enabling the techs to quote in the field could lead to new revenue and better close rates. "Instead of having a team of 5 estimators processing all of our leads, I wanted to enable 80 technicians to turnaround quotes onsite. Onsite FieldQuotes would be much more efficient, more effective and I knew our close rate would be much higher. For most of our customers, our technicians are their trusted advisors when it comes to their HVAC system."

The Solution

In late 2015, Tampa Bay Trane implemented FieldConnect's FieldQuotes mobile field quoting software for 45 field technicians. FieldQuotes integrates with Microsoft Dynamics SL and other ERP packages.

FieldQuotes empowered Tampa Bay Trane technicians to quote add-on business at the job site and eliminate paper-based quotes. The integration with Dynamics SL ensured that quotes used established pricing with minimal back office involvement.

The Results

Tampa Bay Trane experienced revenue growth following the implementation of FieldQuotes. Tim Barnes said, "In the first month that our techs started using FieldQuotes, we had over \$11,000 in new service sales as a result of using the application." Just one month later, Tim reported that sales through FieldQuotes grew to over \$25,000.

Tim commented on why the success with FieldQuotes was so rapid. "Our technicians are very comfortable using FieldAccess and FieldTime for mobile work order management. FieldQuotes has the exact same look and feel as the other platforms so once they did their first quote in the field, more followed. Now the entire team is using FieldQuotes and momentum is building."

About FieldConnect

Since 2002, FieldConnect has provided mobile solutions designed around the needs of field service organizations - from your field engineers, to your dispatchers, to the back office, and your end-customers. FieldConnect provides mobile field service software to best-in-class field service organizations, driving service department revenue and removing inefficiencies.