



Case Study

Client: Contractor in upstate New York with core environmental engineering and construction work

Client Size

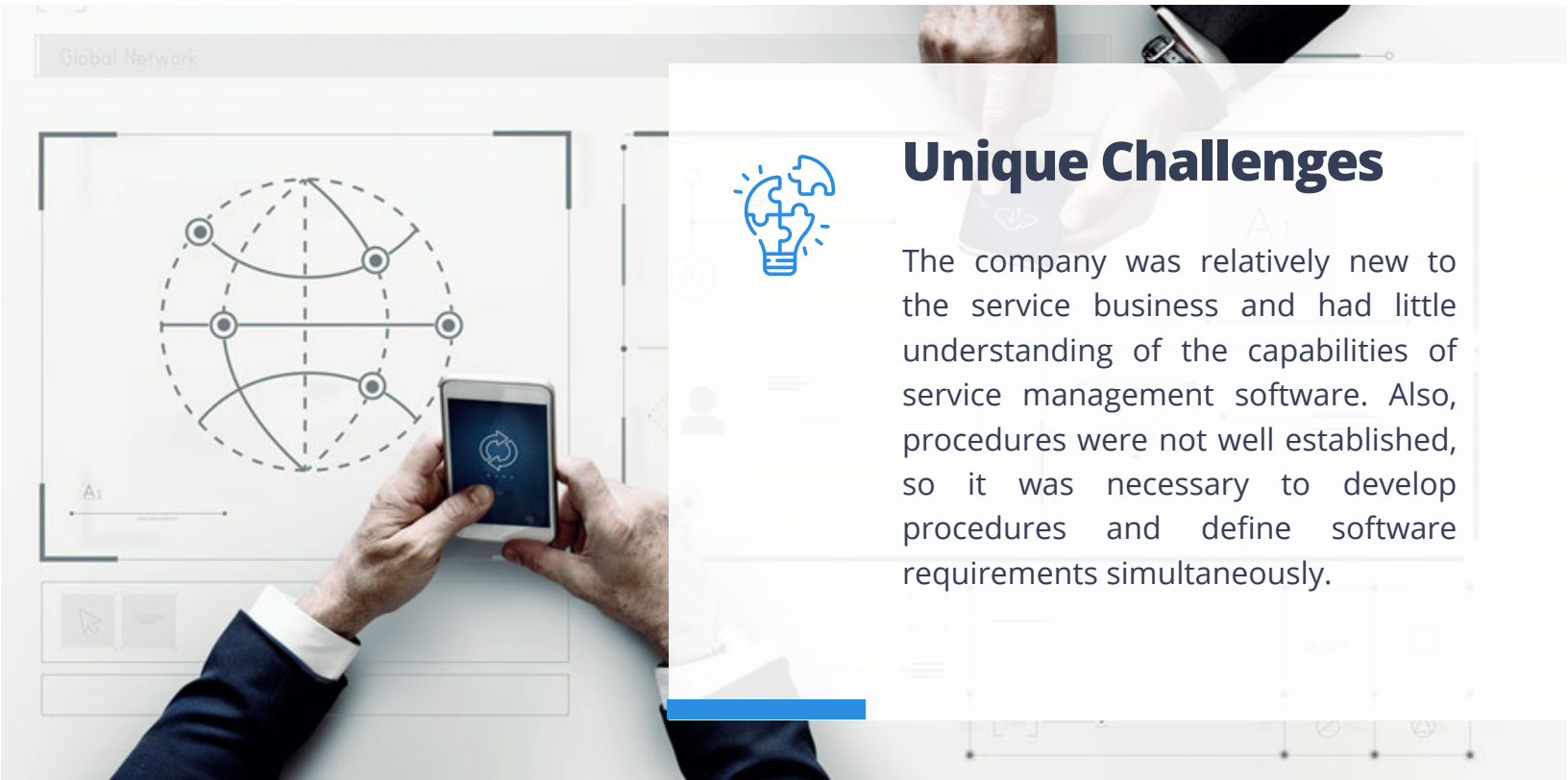
(Annual Revenue)

- \$10M to \$50M
- \$50M to \$200M
- \$200M to \$500M
- \$500M to \$1B
- Over \$1B



Problem

The service contractor was part of an engineering firm that was using a good system that was not well suited to the needs of a service contractor. There were no facilities in the software for handling service calls, tracking and scheduling work, or handling inventory. Nonetheless, there was significant pressure to continue using the core system.



Unique Challenges

The company was relatively new to the service business and had little understanding of the capabilities of service management software. Also, procedures were not well established, so it was necessary to develop procedures and define software requirements simultaneously.

Approach

Burger Consulting Group began the project as a system selection. The client anticipated building procedures around the new software. However, as Burger Consulting Group and the client got underway, it became apparent that the workflow needed to be evaluated and revised separately before software could be chosen. Burger Consulting Group used Visio charting software to document existing and desired processes as well as to document system requirements. Once this brief exercise was complete, the organization moved ahead with the selection more confidently. The software they selected worked with the processes as designed with only minor adjustments. Given Burger Consulting Group's experience with the available software, the process designed did not force them to develop custom applications to manage their business.



Resolution



The client acquired a client/server solution from a recognized provider of service management software that also included job cost accounting, inventory and other systems they needed. Implementation included refinement of processes to fully utilize the new systems. The client implemented the software with their new procedures.



Lessons Learned:

- **Selecting a system is more difficult if your procedures are not well defined**
- **Developing procedures around a system is effective if you have selected the correct system**
- **Sometimes a related business may need unique software if they have unique needs**
- **It is possible to run the software from different vendors on a single platform**

