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# Orangebox

Case study



How Columbus leveraged D365 Field Service for UK-based Furniture Manufacturer to Improve Customer Experience and Reduce Manual Intervention

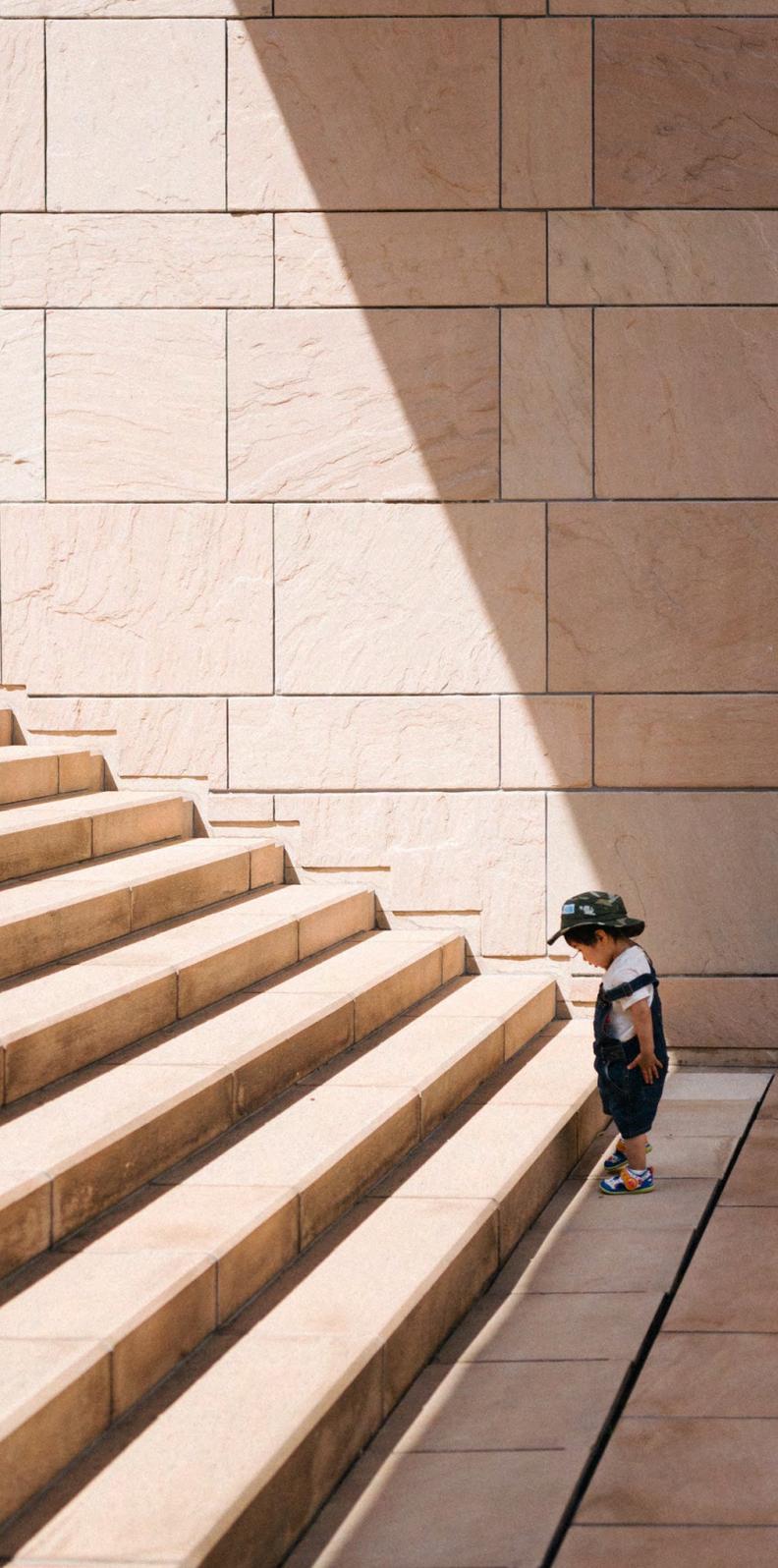
# Introduction

Orangebox is a UK market leader in the research, development, manufacturing, installation, and service of workplace seating and other furniture. Its success has been built on applying innovation – in thinking, design, production, and materials – to real workplace challenges. Orangebox's simple, smart products are never overcooked. By mixing the comfort, style, and personality of home with the performance, practicality, and flexibility of work, they help to create happier, healthier and more productive workplaces.

orangebox

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# The Challenge

At the moment Orangebox relies on multiple systems to manage its customers, retain knowledge and provide management information. Because these disparate systems are not fully integrated, it's not possible to store the details of an end-to-end customer journey in one place.

Despatch, installation and service teams rely on several manual processes to manage delivery and service resource planning. The fluid nature of changes to sales orders means planning has a limited horizon, consequentially requiring the requires manual re-scheduling of work to meet customer expectations.

Field service teams work closely with other departments to ensure that visits are aligned with production and the delivery of service parts, yet, this must currently be done manually. Limited visibility of real-time deliveries and estimated arrival times means that it's a challenge to keep customers and engineers updated about: when planned activities will happen, changes to schedules, etc.

Within transport planning, reports are used to identify despatch and delivery needs. These reports can also be utilised to check the availability of vehicles or drivers and match them to meet required delivery dates. Schedules are mainly created manually, and there are minimal system tools available to support the required processes.

For installation or service visits, any quality issues associated with parts or products rely on a manual process to capture evidence and log issues for resolution. Limited access to relevant knowledge and information beforehand can make installations less efficient.

Potential vehicle restrictions and site-specific characteristics may mean those site assessments – a manual process – need to be completed before any work is undertaken.



In summary, the limitations of the current systems used for customer information and product intelligence mean that a number of Orangebox processes are done manually. Consequently requiring employees to rely on memory, discussion and searching through emails to find what they need.



# How can Microsoft Dynamics 365 Field Service help

Microsoft Dynamics 365 for Field Service looked to address the challenges faced by Orangebox, in the following areas:

1. Transport Operations
2. Delivery
3. Installation & Services
4. Integration

Their focus was on providing system support for planning, scheduling, skill maintenance, and mobility. Reducing the manual effort required to access relevant information, and supporting the activities required to align orders, deliveries and installation or service.

Part of the design looked at full automation for amendment related tasks and load planning, however, the recommendation for the Go-Live was for a semi-automatic approach to be enhanced later on.

# The Key Features of Microsoft D365 for Field Service that will address Orangebox's current challenges are:

## 1 | Installation & Service

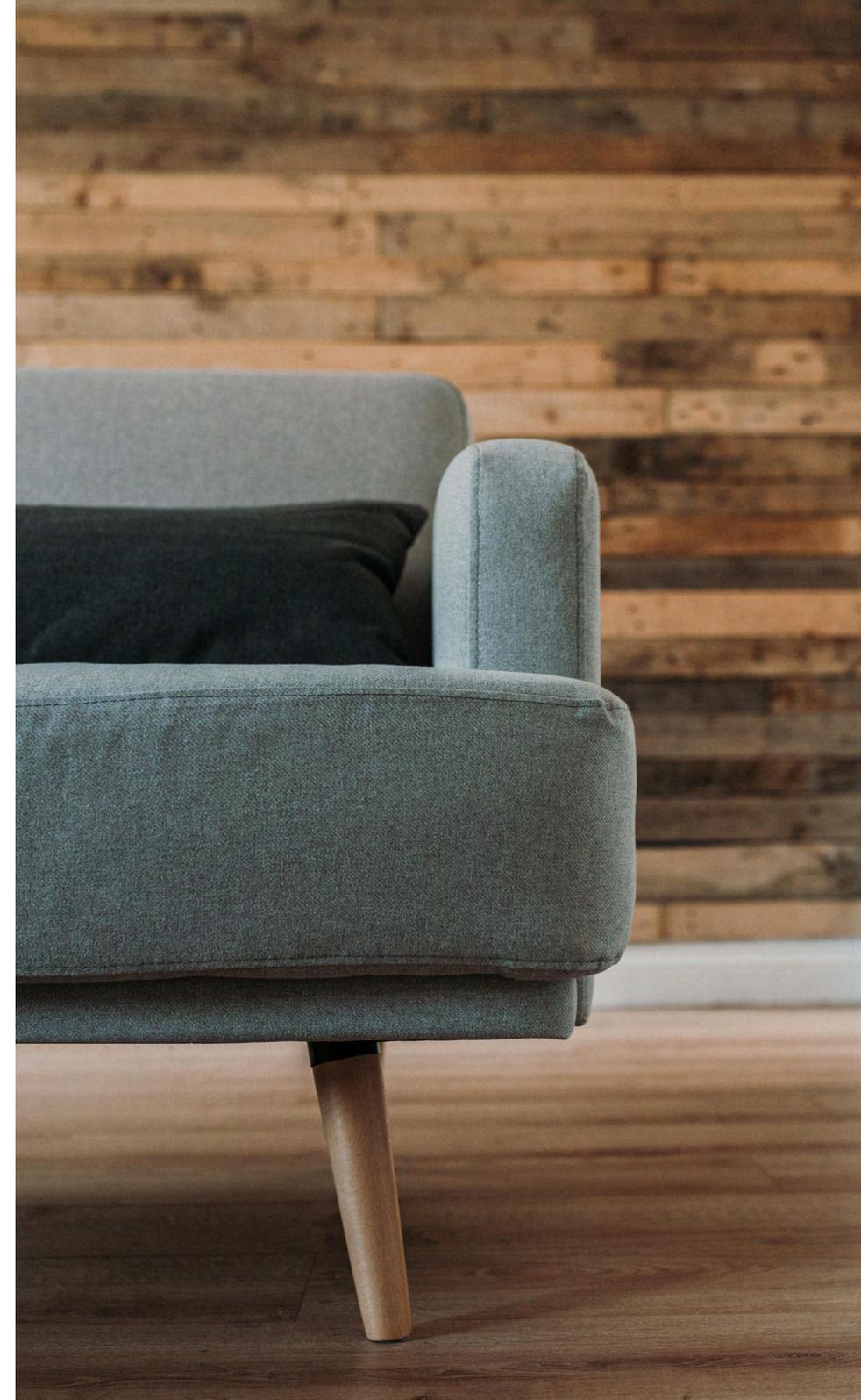
Microsoft Dynamics 365 Field Service's ability to manage skill set and inventory will improve the efficiency of customer satisfaction relating to installations and service requirements. Planning teams will use the Field Service schedule board feature set to marry the right skill sets to the right jobs at the right time.

The flexibility provided by out-of-the-box features will enable our resource planning teams to straw-plan, publish and update schedules for field service engineers. Field-based teams will utilise the Field Service app for a more intuitive and effective experience.

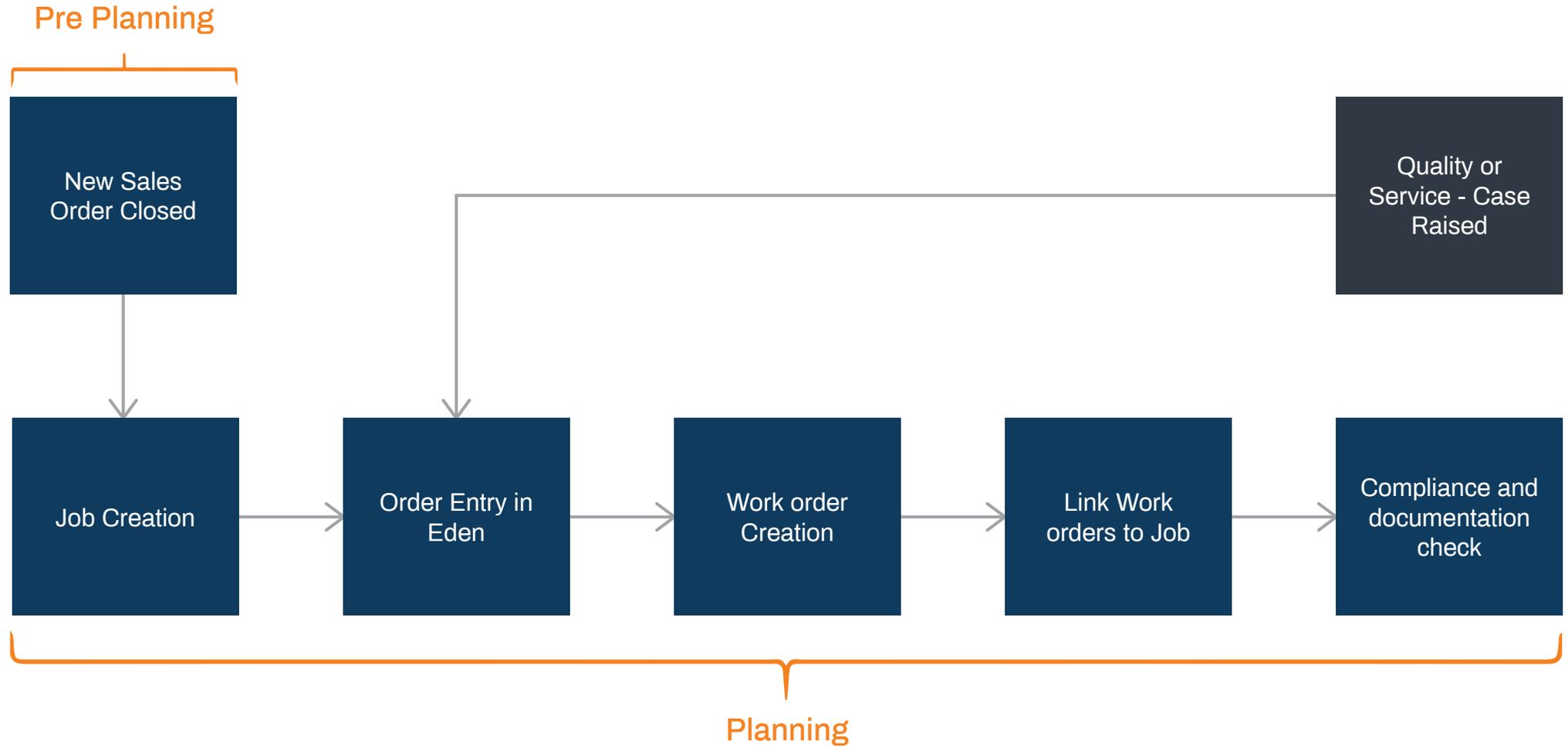


## Additional benefits:

- Planning phase and due diligence before installation, such as site survey booking capability
- Governance automation for RAMS (risk assessments and method statements) and questionnaires
- Site-specific characteristics alert for procedural needs and skill requirement matching
- Creation of 'crews' for a job with Lead Resource ownership allocation
- Installation tasks linked to finished goods and skill-sets
- An Indication of stock levels at the site
- Job completion signature capture
- Issue flagging with video/photographic evidence collection
- Near real-time automated communication to head office on job progress
- SharePoint integration for instant access to job-specific project plans, floor plans, and instructions
- Scheduling of multi-day installation and service jobs
- The Detailed activity closure procedure
- Mobile app offline capability with easy sync process when data connection available



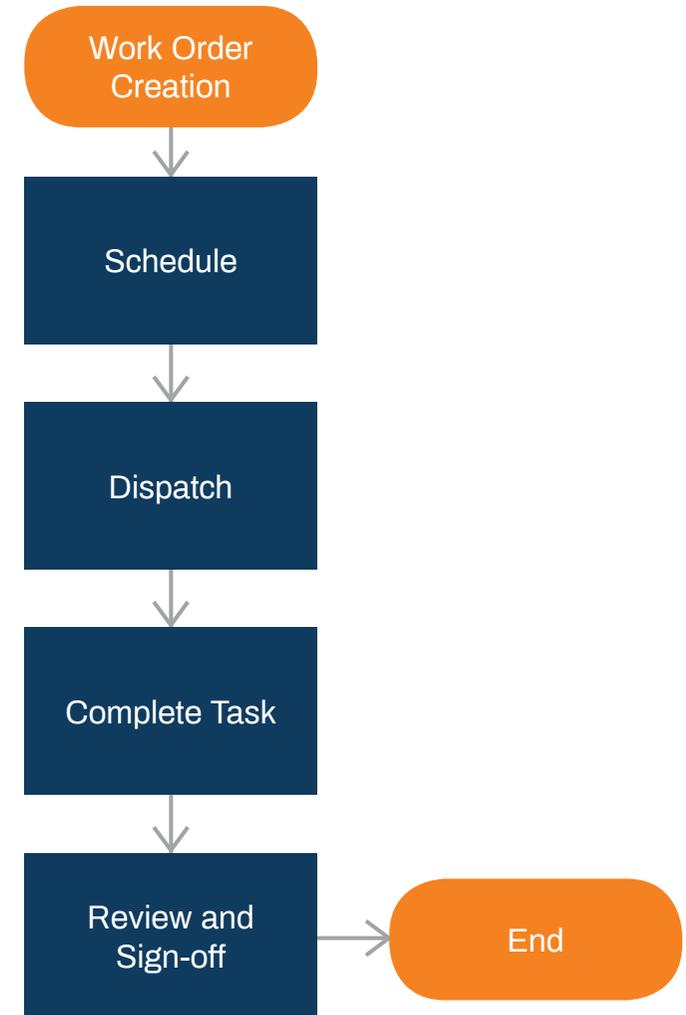
# The new planning process



## 2 | Transport Operations

The solution's functionality to; match, schedule, and plan transport in relation to product requirements enables businesses to meet all site limitations, optimise loads, and enhance routes. As a result, this facilitates improvements to overall efficiency, whilst also supporting track and trace processes through scanning. Benefits for Orangebox include:

- Load planning by the UK and overseas territories
- Scheduling deliveries and backhaul collections to sites, waypoints or warehouses
- Ability to schedule deliveries, per vehicle, per day and for set durations
- Load planning to maximise vehicle capacity and allocation
- Ability to split deliveries across multiple vehicles
- Allocation of 3rd party resources to deliveries
- Access to a load manifest from a mobile interface
- Route optimisation
- Vehicle restrictions configured against an end customer address
- Load and delivery sequencing capability
- Visibility of delivery progress using GPS & ETA data





### 3 | Delivery

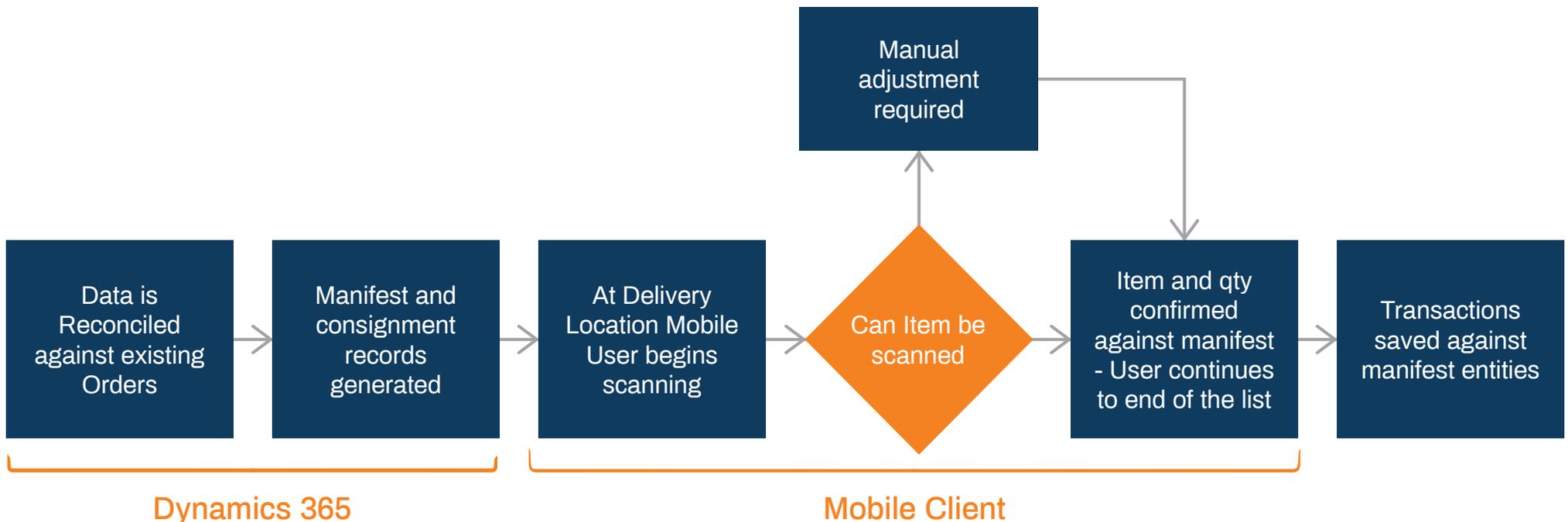
Microsoft Dynamics 365 for Field Service will focus on 'mobile app' functionality including dashboards, bookings, maps, SharePoint integration, tracking and tracing, with easy access to delivery and schedule information to improve the overall delivery experience, including:

- Delivery schedule visibility of bookings and work orders
- Vehicle progress updates using GPS and ETA
- Mobile app offline capability with easy sync process when a data connection is available
- APP customisation to utilise the hardware barcode scanning feature
- Delivery metrics fed into the customer journey
- Proof of delivery signature capture
- Issue flagging with video/photographic evidence collection
- Near real-time automated communication to head office on the delivery progress
- Delivery Instructions are available to drivers

## 4 | Integration

Underpinning the solution is a tight integration between Orangebox's order entry and MRP solution with Microsoft Dynamics 365. Relevant information is readily available within the Field Service solution to support downstream activities, including:

- Work order integration mapping order activity with Microsoft Dynamics 365, both as an initial insert and for amendments to the order
- Journey and manifest data replacing the existing process of data export of delivery and consignment information
- Robust integration solution catering for thousands of data lines, continually updated through an order's lifecycle
- Seamless synchronisation between Microsoft Dynamics 365 for Field Service and the Mobile Client used by field operatives





## Summary

Microsoft Dynamics 365 for Field Service will enhance reputations by providing Orangebox with an accurate and up to date single customer view, bringing together field service with already delivered phases for customer service, sales, and marketing.

The customer journey of; initial contact made during the ordering of products, commodity delivery, and the process of installation will be visible end-to-end. Thus, positively transforming how Orangebox works. The efficiency and productivity gains of this joined-up solution will ultimately enable us to provide an enviable and much-enhanced customer experience.

Field Service will allow Orangebox to manage delivery, collection and installations more efficiently, ensuring activities are planned and aligned, and that the key people (including the customer) have the information they need to carry out activities successfully.

It will transform planning and scheduling processes by managing skills and mobility better, reducing dependence on manual tasks and improving process and knowledge sharing. It will also link and update other areas of the solution to ensure the activity status is clear and closed off on completion.

While full automation won't be available from day 1, it will be introduced post Go-Live, further reducing manual intervention and providing breathing space to review the delivery and make a more informed decision on the best next steps.

#### About Columbus:

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