



**Aptean Equipment ERP**

# The Benefits of Mobile Technology for Equipment Providers

Improve accessibility, visibility and efficiency  
with mobile devices and connectivity





Mobile technology is very much a part of our daily lives, and that’s certainly true in the business world. Consumers expect that the brands they deal with will provide convenient, real-time communication to match their fast-paced, on-the-go lifestyles.

Equipment dealers in particular can benefit from harnessing the power and flexibility that mobile solutions provide, but not all have gotten up to speed with the latest developments. The applications are obvious—consider that sales, service, maintenance and rental drop-offs all primarily occur outside of the provider’s facility, and the ways that mobile technology can improve an equipment business are clear.

As a professional in the equipment industry, you know how crucial it can be to have immediate updates, and you’d definitely rather avoid lengthy email chains and phone calls that eat up time if your needs could instead be served via mobile devices with a quick or even automated process. If you’re still stuck using pen-and-paper methods of record-keeping, it will be quite the change to digitize and embrace mobility, but it will be well worth your time and effort.

There’s more to it than simply putting a smartphone in the hands of each of your technicians, of course. Let’s examine what creating a mobile strategy entails and what you can expect in your organization’s transformative journey.

# Developing a Mobile Strategy

Keep in mind that “mobility” is a general term—applying to a number of internet, cellular network and wireless technologies—so your business needs to carefully assess what solutions suit your unique circumstances. You also need to have an in-depth understanding of what’s already in place and how the new technologies will integrate with those systems and tools.

Once you’ve narrowed down the best way to put mobile technologies to use at your company, try to shape your approach with a focus on achieving these key improvements:

## Better Customer Satisfaction

- › Faster delivery of equipment, parts and service
- › Access to up-to-date data, including warranties, equipment history, before and after repair photos, etc.
- › Instant delivery of important information to field technicians and salespeople, no matter where they are

## Cost Savings

- › Maximize fuel efficiency with remote reporting tools
- › Optimize routes with smart technology
- › Reduce paper usage with automation
- › Lower phone bills by opting for more efficient mobile communication methods

## Improved Workforce Productivity

- › Less risk of human error
- › No more time wasted driving to the office to fill out paperwork, phoning, emailing or faxing
- › Avoid duplicate data entry with a fully digital environment
- › Capture electronic signature from customers while in the field

## Streamlined Operations

- › Enable real-time quoting and billing
- › Ensure accessibility of up-to-date facts and figures regardless of location

## Increased Sales

- › Increase employee productivity by relieving the burden of manual processes

## Early Revenue Catcher

- › Assess repair and maintenance needs from anywhere and automatically generate work orders based on real-time reports

## Equipment and Asset Management

- › Gain historical insight, including equipment requirements, utilization history and operating and idle time, at a moment's notice
- › Manage equipment lifecycles for used, new and rental fleets



Mobile technology offers the ability to bill on site and in real time, meaning your purchase orders go out promptly and payment is received on time.

## Empowering Your Workforce

While your field technicians will likely face the biggest adjustment as you roll out your mobility plan, everyone in the organization will enjoy the advantages that new technology provides.

### Field Service Technicians

Your service department is the heart of your business, as that's where the majority of your profit lies and the center of the company's core offerings. Your field service technicians need to be able to provide immediate updates and access important data while they are doing their jobs at your clients' locations.

From providing simple tools for logging billable time accurately to viewing work orders, customer history, inventory and troubleshooting tools, your technicians can have everything they need in the palm of their hand. And of course, they'll be able to instantly capture new information collected in a digital form that ties back to your main systems.

### Sales Team

The sales profession demands that an individual go the extra mile—quite literally in the sense of visiting clients at their physical locations. Help your sales team reach their full potential by giving them remote access to all crucial information, no matter where they might be.

Mobile-enabled sales teams achieve more by:

- › Shortening cycles for lead to order, order to cash and contract to cash
- › Delivering at the point of service, presenting invoices, contracts, warranties and other documentation to clients at their own facilities
- › Optimizing routes to travel more efficiently and get more done
- › Dynamically scheduling calls and follow-ups
- › Tracking deals and close ratios of individual by employee
- › Communicating with prospects and customers through targeted marketing campaigns
- › Checking equipment and customer histories in real-time to provide accurate quotes with agility

## Finance

Mobile technology also offers the ability to bill on site and in real time, meaning your purchase orders go out promptly and payment is received on time. With the right solutions, you don't have to wait for paperwork to be filed and approved—everything can be done via mobile devices.



# The Importance of Integration

Improving your staff's ability to operate at full capacity in the field with mobile technology and digitizing your data capture are huge steps forward, but the real difference-maker in your mobile strategy will be how well the new devices integrate with your core systems. The ideal situation is to select mobile solutions that integrate with an industry-specific enterprise resource planning (ERP) platform like Aptean Equipment ERP.

If your business is still on legacy systems that are incompatible with mobile technology, a full replacement may be in order. You'll want to shop for ERP providers that can provide the following:

- › Total integration with your team's mobile devices
- › A unified solution that ties your departments together with a single version of the truth
- › Functionalities that are specifically designed for equipment businesses like yours



Mobile technology won't just make your employees' jobs easier and facilitate excellent performance—it can also help you manage and monitor your equipment more effectively.

## Types of Mobile Technology

With advanced and fully connected mobile devices in their hands, your employees will be able to do more from the field than ever before. The positive results will be felt in numerous areas of the organization.

### Sales Force Automation

Also known as field sales automation, this term encompasses technologies that enhance customer communication, workflow and opportunity management. It should help you juggle all of the following:

- › Opportunity management (OM), which ensures your team focuses on key customers and that sales forecasts are accurate
- › Campaign management (CM), which allows you to target certain groups of prospects and customers and evaluate ROI on your campaigns
- › Customer relationship management (CRM), a comprehensive system that combines OM and CM

Once your team is fully mobile-enabled, you can expect a better bottom line through:

- › Immediate access to customer and work order histories, parts availability and delivery schedules
- › Automatic contact information integration, eliminating lag in communication
- › Excellent visibility into sales activities

## Field Service Automation

Several of your teams will benefit from mobile automation technologies in the field, including:

- › Technicians
  - ›› Access work orders, parts and inventory tracking, warranty information, timekeeping, customer data, daily schedule and more from mobile device
- › Dispatchers
  - ›› Create, assign, review and update work orders based on status, date, location, technician or customer
  - ›› Easily schedule assignments by dragging and dropping to rearrange and organize
  - ›› Utilize GPS tracking to monitor technicians, customers, warehouses and service vans remotely
- › Service Management
  - ›› Gain insights in real-time to facilitate informed decision-making
  - ›› Capture employee performance data, including service time, tasks, expenses, etc.
  - ›› Implement automated alerts, including work order status updates
- › Parts and Warehouse
  - ›› Use a searchable parts list with quantities on-hand and on order
  - ›› Take advantage of fully up-to-date facts and figures to better manage inventory

## Equipment Telemetry

Mobile technology won't just make your employees' jobs easier and facilitate excellent performance—it can also help you manage and monitor your equipment more effectively. The key solution here is telemetry devices, which can send important information, including hours run, miles driven and more, via cellular networks to the internet.

Technicians will no longer have to plug into the equipment to get critical readings, as that data will be sent automatically by the telemetry device and automatically update your system with new readings and details collected. Your equipment managers will be able to see this new information as it comes in, no matter where they are, so that they can take quick action should the need arise.



As mentioned with other mobile technologies mentioned here, the telemetry devices you use should also be integrated with your ERP system. Aptean Equipment ERP is fully capable of connecting you're your telemetry devices and making the data they capture immediately accessible to everyone in the organization.

By using telemetry with your new, used, rental and customer-owned equipment, you'll be able to better manage your assets and unlock even more advantages:

- › Improve accuracy for preventative maintenance contracts based on data captured by telemetry systems
- › Optimize routes and logistics using GPS
- › Carefully monitor safety concerns with complete information of maximum lift height, forklift speeds, etc.
- › Keep your finger on the pulse of all-important hour/meter readings
- › Utilize geo-fencing to track your equipment's location within and outside of designated areas, allowing for evaluation of adherence to service contract, warranty and regional tax rates

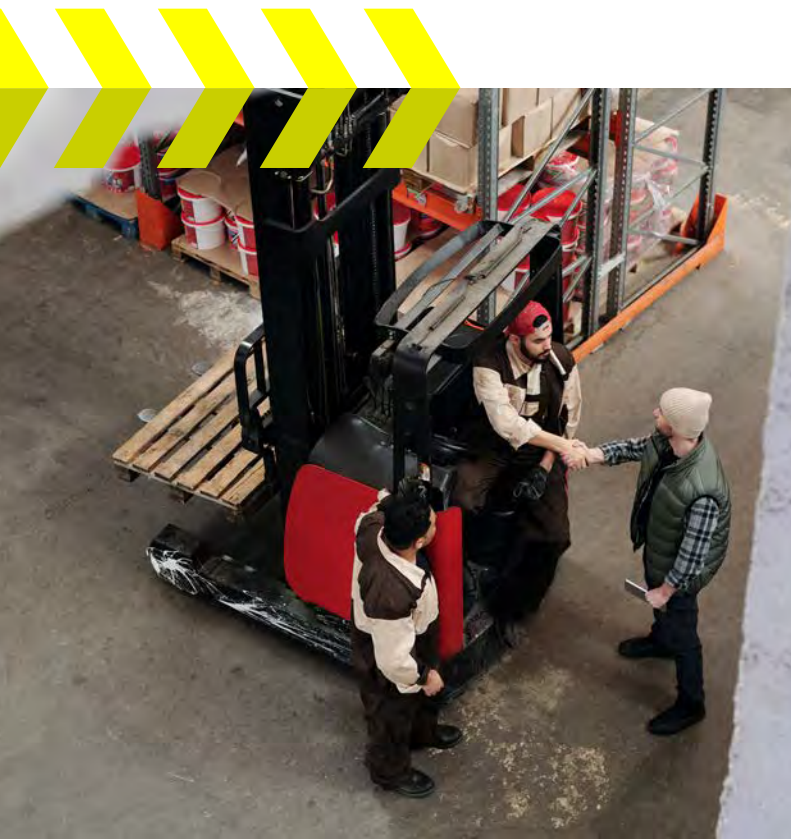


# Making Mobile Technologies Work for Your Organization

Adopting a mobile strategy and giving your employees the freedom and power of operating from any location serves the greater purpose of making your equipment business more agile and better able to serve customers, which should lead to better profitability going forward.

A successful equipment provider needs excellent field service management, sales processes and in-depth data on equipment. Mobile technology can assist on all of these fronts and more, making it an obvious step forward for any organization still relying on traditional methods of data collection and communication.

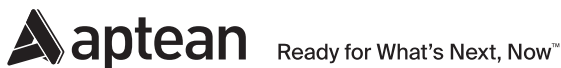
**Aptean Equipment ERP** can be the basis for your transformation, integrating with all of the new mobile devices you put in place and providing a unified platform for all of your teams. **Contact us today** to learn why you should partner with a trusted, experienced solutions provider like Aptean.



## Are You Ready to Learn More?

Interested to see how Aptean Equipment ERP can help you better manage your equipment business?

Contact us at [info@aptean.com](mailto:info@aptean.com) or visit [www.aptean.com](http://www.aptean.com).



### About Aptean

Aptean is one of the world's leading providers of industry-specific software. Our enterprise resource planning and supply chain solutions are uniquely designed to meet the needs of specialized manufacturers and distributors, while our compliance solutions serve specific markets such as finance and life sciences. With both cloud and on-premise deployment options, Aptean's products, services and unmatched expertise help businesses of all sizes, across many industries, to scale and succeed.

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