



Solution Overview

INDUSTRY
Service Industry

SCENARIO
With over 1400 customers nationwide, Masterplan sets high standards to provide quality service and support for their customers. Tracking the numerous service calls, parts, labor, warranties, returns and contracts was challenging because Masterplan was using a combination of a manual system and an outdated computer program that required double entry of most data.

COMPANY PROFILE
Masterplan helps healthcare facilities reduce equipment-related operating expenses by managing the cost of maintenance, selection and utilization of sophisticated medical equipment.

SOLUTION
Now, instead of manually tracking contracts, service calls and equipment, information is immediately available online via the Web, allowing technicians to readily update customer information, review the latest data and provide higher levels of service. Customers are able to troubleshoot their own service problems.

SOFTWARE USED
Microsoft Great Plains eEnterprise Field Service
Service Call Management
Contracts Administration
Manufacturing Series
Preventive Maintenance
Returns Management

Masterplan, Inc.

Masterplan, Inc., the nation's largest independent service organization, helps healthcare facilities reduce equipment-related operating expenses by managing the cost of selection, maintenance and utilization of sophisticated medical equipment. Implementing Microsoft Great Plains eEnterprise Field Service software has given Masterplan, Inc. a definite edge against their competition, enabling them to increase their efficiency and improve their overall customer service.

The company estimates that they have saved between one and two million dollars just by implementing Returns Management software.

Headquartered in Chatsworth, California, Masterplan, Inc. offers hospitals, integrated health systems and alternate site providers three programs designed to build upon each other to give healthcare facilities an important edge in an intensely competitive marketplace.

About Masterplan, Inc.

Whether it is servicing an oxygen monitor for a local veterinarian or an incubator in the neonatal unit of metro hospital, Masterplan is critical to the operations of healthcare providers nationwide. As the nation's largest independent service organization, Masterplan, headquartered in Chatsworth, California helps healthcare facilities reduce equipment-related operating expenses by managing the cost of maintenance, selection and utilization of sophisticated medical equipment.



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With their focus on quality customer service, Masterplan chose a field service software system that would support that philosophy. According to Bruce Cree, Chairman, President and CEO, "Masterplan recently attained the largest contract ever awarded in the field service industry. Part of that was a direct result of the new system implementation." Masterplan will provide comprehensive maintenance management programs to all Triad Hospital, Inc.'s 27 hospitals and 13 ambulatory surgery centers. Triad attributes their decision to choose due to Masterplan's flexibility and cost-saving services.

Need to advance service program

With over 1400 customers nationwide, Masterplan sets high standards to provide quality service and support for their customers in a variety of health settings, including nursing homes, hospitals, emergency rooms, surgery centers, physicians offices and even in veterinary medicine. Tracking the numerous service calls, parts, labor, warranties, returns and contracts was challenging. To be cost effective and to continue providing their customers with the level of high quality service they deserve, Masterplan decided it was time to automate their service capabilities to the next level.

Microsoft Great Plains eEnterprise Field Service—giving Masterplan a competitive advantage

Microsoft Great Plains partner FMT is a national application systems and business consulting firm dedicated to helping companies meet their technical and business objectives. With their ability to address complex business issues, FMT evaluated Masterplan's needs in the service area and concluded that Microsoft Great Plains eEnterprise Field Service would clearly meet their needs. "The combination of Microsoft Great Plains' software and FMT's implementation team has given Masterplan a definite edge against our competition," said Raja Bamrungpong, Vice President of IT at Masterplan.

Masterplan's system is composed of eEnterprise Service Call Management, Contract Administration, Preventive Maintenance and Returns Management. Now, instead of manually tracking contracts, service calls and equipment, activity on those accounts is immediately available online via a secure Web site, allowing technicians to readily update customer

information, review the latest account information and provide a higher level of service. Customers benefit by receiving stellar service plus the capability to view the status of their service calls, and to place new service requests via the Masterplan Web site. This has resulted in an increase in the number of service requests Masterplan is able to process without the need to hire additional employees.

Benefits of the new solution

Masterplan and FMT implemented eEnterprise Field Service applications including Service Call Management, Contracts Administration, Preventive Maintenance, and Returns Management, plus eEnterprise's financial applications.

Service Call Management reduces operating costs

Masterplan can now log service requests, check the repair status of a call and enter their own meter readings via a Web browser. eEnterprise Field Service, particularly the Service Call Management module, helped Masterplan reduce the direct cost of operating its customer service center. Customers are able to troubleshoot their own service problems and can update an outstanding service call as additional information becomes available or as the status of the call changes. A secure environment allows customers to see only the information that is applicable to their service situation while a powerful search engine allows customers to access a problem/repair database by product so they can assist in pinpointing the problem before personal contact. This Web-based system has enabled Masterplan customers and field technicians to enter, view and modify open service calls. eEnterprise Field Service allowed Masterplan to develop an easy, error-proof process, providing their customers with 24-hour service without adding a single technician or dispatcher.

Contracts Administration helps maximize service revenue

Masterplan is in a better position to maximize service revenue by effectively managing its complex, multi-tiered contracts, quotations and warranties. Tracking customer contracts, quotes and equipment

histories is now easily maintained and modified using the Contract Administration module. Masterplan is able to quickly pinpoint contracts that are up for renewal and view the previous contract's profitability. In addition, contractual arrangements are reflected in work orders, making billing simple.

Service calls are automatically generated based on contract obligations and contracts can be automatically renewed. The built-in reporting and inquiry tools programs help cut expenses, reduce paperwork and increase customer satisfaction.

Preventive Maintenance helps achieve more effective and efficient use of resources

Preventive Maintenance manages the details of Masterplan's service agreements, ensuring they deliver on their contract obligations. They are able to track and schedule preventive maintenance calls, ensuring the right parts, consumable supplies and technicians are in the right place at the right time.

When customers open a service call for an item with a scheduled preventive maintenance contract, technicians are notified so the routine call can be handled simultaneously. This results in fewer costly trips to customer sites and accurate billing. With reliable fiscal information, Masterplan generates reports or adds information to its data warehouse for analysis and future use. Masterplan has achieved a more effective and efficient use of service resources throughout their maintenance process.

Returns Management—saves Masterplan between \$1 to \$2 million

Returns Management allowed Masterplan, Inc. to streamline the process for tracking and processing repairs and provides a central management point for parts returns. Masterplan is able to support high-volume repairs and rapid turnaround, while creating levels of service tailored to individual customer needs. Efficient transaction entry processes address both repairable and non-repairable returns. Each return is assigned a unique ID and the transaction is tracked through the repair cycle.

When dealing with high priced x-ray and MRI equipment, vendors of these products often alleviate

the expense by providing a rebate when used or damaged equipment is returned. For example, an x-ray tube vendor provided a \$10,000 rebate for each tube that was returned. Without a system that readily tracked pieces that received or should receive rebates, Masterplan, Inc. often could not take advantage of this program. The company estimates that they have saved between one and two million dollars by implementing Returns Management. They have done this by utilizing the reimbursable vendor warranty tracking system.

eEnterprise Field Service is a key part of Masterplan's strategy

Customer service is key to Masterplan's business. They worked closely with FMT to take this service to a higher level by ensuring that their employees were prepared with extensive training. Plus, they visited some of their customers to demonstrate their new service system, emphasizing their dedication to their customers' satisfaction by embracing leading-edge technology. Customers were delighted to be able to view information about their own accounts online using a secure Web system.

**For every business
problem there is a
Microsoft Great Plains
Business Solution.**