

# Xora Case Study

“ Field Force Manager has helped us streamline our operations in the field. ”

— Shawn Godfrey, Office Operations

## Morrison



### Situation

Since the 1950's, Morrison Incorporated has provided HVAC, heating and conditioning, to the Mid Ohio Valley. Currently co-owned by the son of the company's original founder and the son of the original bookkeeper, Morrison Incorporated has grown to include its own custom sheet metal shop, industrial and commercial refrigeration service and installation and a 15-truck service fleet.

### Challenges

When drivers were on the road, Morrison Inc. had no way of knowing exactly where their drivers were or if they had successfully arrived on site for their service call. A customer calling to confirm a driver's status weren't very successful. Morrison

staff had to try to get in touch with the driver in order to update the customer. Morrison's old mobile phone system was only sporadically able to provide service coverage and allow prompt communication between the driver and the dispatcher. The company had little immediate visibility into where each worker was or whether they had completed their current service call.

### Solution

Morrison purchased Xora mobile work force management software in order to gain better visibility into the locations and availability of its drivers throughout the day. With Xora, Morrison Incorporated can validate when jobs are completed and how long the jobs took. Through the Xora web

portal, supervisors can see where drivers are at all times, making routing and dispatching operations more efficient.

### Results

With Xora, Morrison Incorporated now knows where drivers are during the day, which service calls are complete and which are still outstanding. Better insight into the drivers' locations helps the company adjust to schedule changes without losing a beat. Using Xora's custom reporting feature Morrison has implemented movement and speeding alerts to notify office managers of a drivers position or if a driver is traveling too fast to get to the next job. All of this allows Morrison Incorporated to be more proactive in the management of its service-men, streamlining its field operations.

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