

# Case Study — Carillion



Carillion Energy Services is one of the UK's **largest suppliers of heating and renewable energy** and is at the forefront of the carbon economy.

Carillion Energy Services has built a strong reputation for its design, implementation and delivery of programmes which address environmental and social inclusion challenges. As a green services provider it is operating at the heart of the rapidly developing low carbon economy.

Working in partnership with customers including central and local government, the major energy suppliers, local authorities and housing providers, Carillion Energy Services helps to improve the living conditions of vulnerable households by improving the energy efficiency of their homes. A key strength is its ability to deliver these hugely important initiatives at scale.

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— **Graham Tye**, IT Director,  
Carillion Energy Services

## CHALLENGE

To streamline the surveying process to a single technical surveying team. To ensure data is consistently recorded and systematically transmitted to the Oracle CRM and ERP systems to speed up the approval process. To make this data available to sub-contractors in order to allow them to bid on installations across the UK.

## SOLUTION

Provide technical surveyors with the AMP™ mobile solution on Panasonic Toughbooks, enabling them to upload information ranging from installation details, to parts required, to Computer Aided Design (CAD) drawings.

## RESULTS

Technical surveyors can now update the core back office systems in real-time.

Data quality has improved because surveys are carried out by the same team, transforming the way the business functions.

Data is now pooled enabling sub-contractors to bid for work even if they are not located in that region.

## PRODUCTS AND SERVICES

Antenna Mobility Platform™ – AMP



NATIVE



SERVICES



B2E

**ANTENNA**  
deploy happiness

### MANDATED MOBILITY

Making heating affordable to all and tackling the plight of fuel poverty, where households spend 10% or more of their income just to keep warm, is as important as it is challenging. The 'Warm Front' Scheme is a UK government initiative which aims to tackle fuel poverty by providing heating and insulation grants to households on qualifying benefits who own their own homes or rent from a private landlord.

The scheme is managed and delivered by Carillion Energy Services and has assisted more than 2.1 million households across England since 2000. As part of a policy of continual improvement and to make the process more streamlined and easier for the customer, a new surveying system was needed to allow information collected in applicants' homes to be efficiently relayed to back-office systems.

Under the terms of the Warm Front Scheme, a preliminary assessment would determine a householder's eligibility and what energy

“We have inherited a number of different mobility solutions that were developed on a tactical basis but what we were looking for, both for this project and to take us forward, was a strategic futureproof solution.”

— **Graham Tye**, IT Director, Carillion Energy Services

bi-directional communications from centralized management systems. These included Oracle ERP and CRM systems and a custom developed web portal over which the data could be communicated to sub-contracted installers.

Carillion Energy Services looked at a number of enterprise-class mobility solutions, evaluating each according to their multi-platform support, robustness, extensibility and scalability, before selecting the AMP™ mobile solution, powered by Antenna.

Carillion Energy Services are now developing further apps entirely in-house, allowing Carillion Energy Services to hone the apps to meet its needs while utilizing the automatic prebuilt connectors for Oracle which have made integration with the back office systems so straightforward. The apps are then deployed over Panasonic Toughbooks to enable surveyors in the field to communicate with the ERP and CRM back office systems.

### WARMING TO THE IDEA

Prior to the deployment, Carillion Energy Services carefully orchestrated a Change Management plan to ensure that the technical surveyors knew how to get the most out of the system. A business team set about identifying the data capture requirements and initiated an in-house training programme for the technical surveyors who were tasked with gathering enough data from the initial home visit to prevent the need for a second survey.

Carillion Energy Services began rolling out their custom developed application based on AMP™ on a regional basis using a phased approach in late 2009. “We had a fixed business critical deadline to get the first region live, which we had to meet. Using the Antenna platform combined with our in-house development team, we did hit it and we've been able to hit every target since,” adds Graham Tye.

What was needed was an effective mobility solution to collect and record data in the field more consistently and robustly.

efficiency measures were needed and considered appropriate. This was then followed by a more technical survey, often by a sub-contractor, who carried out a detailed survey to determine the required energy efficiency measures. Combining these two visits into one would improve customer service and better ensure the consistency, quality and integrity of the data collected.

### A FUTUREPROOFED SOLUTION

Carillion Energy Services set about looking for a solution it could deploy on premise, behind the company firewall, to allow it to manage and coordinate the national operation itself. In addition to offering enterprise-class apps capable of allowing the user to work offline, the solution also needed to automatically manage

Carillion Energy Services and Antenna worked together to design and configure a number of bespoke mobile applications using the AMP Studio mobile application development environment. Carillion Energy Services' in-house development team designed, built and deployed the initial app with input from Antenna's professional services team.

Within just six months, the company had populated the user database and had systematically downloaded the application to every Panasonic Toughbook across the country, achieving national coverage on deadline by June 2010.

— **Graham Tye**, IT Director, Carillion Energy Services

From a government perspective, it has provided service and cost efficiencies. Household customer's needs are now assessed fairly and consistently, grants are awarded more quickly, and installations triggered more swiftly.

### TRANSFORMING THE PROCESS TRANSFORMS THE BUSINESS

The technical surveyors now use Carillion Energy Services' AMP™ based application to access customer records on the spot from the Oracle ERP and CRM systems, enabling them to locate customers and update the system on the progress of an application in real-time.

"Our priority has to be creating and transmitting the necessary information as efficiently as possible to make sure each and every installation progresses quickly. After all, people are relying on us to keep them warm through the winter," explains technical surveyor, Dave Childs.

"During the assessment we create a number of documents including CAD (Computer Aided Design) drawings which are then uploaded together with other information such as the installation details and parts recommended for the job, to the portal website. That transfer is carried out automatically, allowing the subcontractors to make an informed decision on whether they wish to bid electronically for the work."

As a result of installing the mobility solution, Carillion Energy Services has been able to transform its business processes in these areas, with key personnel able to create and upload data into the internal systems automatically using the mobility platform.

"We're now able to carry out all of the technical surveys ourselves whereas before every subcontractor had their own way of doing things. We tell them which parts to install and where and they take it from there. We've taken back control of the process and improved data integrity as a result," says Graham Tye.

Initially the AMP™ deployment focused solely on mobilizing the technical surveyor team but the productivity and efficiency gains conferred have spurred Carillion Energy Services to look at mobilizing other field personnel, such as heating installers.

"Using AMP™ and our custom applications we've radically transformed this part of the business in a very short time."

Extending the system in this way will see more than 230 additional users added on to Carillion Energy Services' AMP™.

These users will be assigned dedicated apps over handheld PDAs to access customer records, inventory and information on the status of claims, helping to introduce transparency into the whole process from assessment to installation. Currently at the trial stage, this part of the mobility project is expected to go live within the next few months.

### FURTHER BENEFITS

A mobility solution was stipulated as a condition of the Warm Front contract, but the initiative has also illuminated ways in which the company can introduce greater transparency.

"We succeeded in re-winning the Warm Front contract largely because we were able to demonstrate how new elements including the mobility business process could be implemented to improve and streamline the whole service and the end-to-end system," says Graham Tye.

The AMP™ solution is now proving its worth in other elements of the business, starting with the installation teams, and the plan is to continue to mobilize other segments. "We now have in place a built-for-purpose enterprise platform for mobile solutions and, with 2,500 field workers, the intention from my perspective is to use AMP to mobilize further elements of the business as and when appropriate," states Graham Tye.

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#### Related Reading

- Antenna Corporate Overview
- Antenna Mobility Platform
- Antenna Native Client

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HAPPINESS**

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