



# Direct Energy Increase Competitive Advantage with ClickSoftware



## The Company

Direct Energy Essential Home Services provides repairs, maintenance, heating and cooling HVAC installation, and energy-related home improvements to 1.3 million customers that are sub-divided into 25 field patches in Ontario, Canada. It is also responsible for HVAC and plumbing protection plans to a further half a million residential clients.

It is part of Centrica, a group of companies that provides energy and other services to more than 32 million customers worldwide.

## The Challenge

In October 1999 Direct Energy Essential Home Services was facing the huge challenge of deregulation in Canada. Crucially it also realized that this was a time to take advantage of the many opportunities that the new open market offered.

ClickSoftware was chosen by Direct Energy to facilitate their twin strategies of stealing a march on the competition and capitalizing on the open market conditions. The deployment of ClickSchedule, implemented by ClickSoftware partner, Diabsolut, was instrumental in helping Direct Energy achieve many outstanding business milestones, including instantly managing the contracts of 1.1 million rental customers, reducing dispatch labour by 70% and increasing technician productivity by 20%.

Canada presents a wide variety of business and natural challenges that can determine success or failure for operators in the de-regulated home services market. The extreme temperatures challenge any service company's ability to meet wildly fluctuating demand for technicians to repair heating systems during bitterly cold winters and air conditioning units during the sweltering summers. Deregulation has also meant that there are many competitors vying for position in the market.

Bryan Ward, Director of Planning and Logistics for Home Services Canada, outlined Direct Energy's position, "We operate in a dynamic environment and to stay on top we constantly challenge the status quo. Whilst ClickSoftware had performed outstandingly for us since 1999, we took the decision in September 2007 to re-evaluate our scheduling systems."

## Benefits

- **20% Increase in Technician Productivity**
- **Greater levels of optimization** keeping Direct Energy ahead of the competition
- **Ability to complete more work** with the same staffing levels
- **Improved customer service** through realistic, accurate and narrow appointment slots
- **Fuel costs** and carbon emissions have been reduced
- **Upgrade completed** on time and budget

### The main business drivers behind the re-evaluation of its scheduling systems were:

- To seek new competitive advantage in the face of many smaller regional players
- To eliminate unnecessary cost (e.g. excess fuel bills)
- To provide the very best customer service
- To improve visibility of field resources

## The Solution

Direct Energy evaluated a number of new scheduling tools. The results would be unsurprising to ClickSoftware's existing clients; as Ward outlined, "We quickly realized that what we already had with ClickSoftware was state of the art and way ahead of what was available elsewhere. What's more, the solid relationship we had with ClickSoftware, who were always there when we needed them, made it easy for the Steering Committee to decide what would be the best competitive decision for us."

Rather than go to another supplier Direct Energy decided to upgrade their existing ClickSchedule infrastructure from 7.1 to 7.5. Furthermore, based on their previous positive experience, they opted to use the solution straight out of the box, which delivered three benefits:

- Business processes were adapted to the best of breed provided by ClickSchedule



- Future upgrades would be simplified and more cost-effective
- The scheduling operations would work even faster with less customization

Direct Energy knew they would be getting best of breed because they sat on the Customer Advisory Board that is essential to ClickSoftware's product development. The Board is a forum for customers to suggest what possible features could be added to ClickSoftware's solutions to help them run their businesses better. Bryan Ward summarized the success of this initiative, *"This latest version is the perfect example of a vendor really listening. The product has matured and addresses the needs of a company that relies on its field staff to provide a crucial difference to its customers."*

Such was their confidence that Direct Energy decided in addition to the upgrade to take advantage of two further modules, ClickForecast and ClickAnalyze which will go live in February 2009. When implemented, Direct Energy plans to use ClickForecast to improve its understanding of future demand and plan accordingly to improve customer service, budget more efficiently and use resources to greater effect.

ClickAnalyze was chosen to provide an intuitive window into the mass of complex data that is generated by the field services. It will, for example, give the decision makers at Direct Energy the opportunity to understand hitherto hidden business trends and study "what if" scenarios.



## The Implementation

The upgrade of ClickSchedule began in November 2007 led by a core team of 15 people from Diabsolut, ClickSoftware, the Steering Committee, Information Systems (IS) and business operations.

The upgrade was an incredibly smooth process, *"I have worked on many projects of this nature and due to regular Steering Committee meetings, excellent project managers from both ClickSoftware and Direct Energy and great chemistry between team members, it was an outstanding effort,"* commented Ward.

The omens for success were good, the system went live on time and on budget at the beginning of June 2008, coping easily with the demand on one of the busiest days of the year.

ClickSchedule 7.5 has provided Direct Energy with some powerful business tools; it can for instance automatically optimize the maintenance schedule based upon a series of complex criteria such as Service Level Agreements (SLA), client availability, and technician location, availability and skill set. Even more impressively, Direct Energy can now continuously optimize and readjust the schedule to respond to inbound calls in real time.

The ability to automatically schedule the majority of the jobs in an optimal manner helps mitigate risk in the business by reducing reliance on human resources who may go on vacation, or sick leave, or leave the business altogether taking valuable knowledge with them.

Ward highlights the business implications, *"This automation of the optimized scheduling is an impressive feature that provides us with many business benefits. Our planning team spend more time on strategic issues rather than administrative fire-fighting, fewer errors are made, fuel costs are reduced, productivity of the field technicians has gone up, there is better appointment availability and customer service is improved. To us this means lower cost, increased sales and higher customer retention."*

Direct Energy have 900+ field technicians and sales agents who deal with 750,000 annual field calls and like any organization that relies heavily on mobile staff, the scheduling is mission critical to all areas of the business as underlined by Ward, *"ClickSoftware is of strategic importance to our business, it is viewed at executive level as providing clear competitive advantage in our marketplace and is undoubtedly key to the future success of Direct Energy."*

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**Bryan Ward, Director of Planning and Logistics for Home Services Canada**

- For more information on Direct Energy visit [www.directenergy.com](http://www.directenergy.com)
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