

Streamlining SES's Documentation Process



Customer Quick Facts

INDUSTRY:

Energy

HEADQUARTERS:

Cincinnati, OH

WEBSITE:

www.sesinc.com

Superior Environmental Solutions (SES) is a premier provider of industrial, environmental, and emergency response services that works with manufacturers in Ohio, Michigan, Indiana, Kentucky, and Tennessee. Founded in 1999 and headquartered in Cincinnati, Ohio, they have seen 3x growth since 2014, with over 400 employees in the industrial and environmental services divisions.

Challenge

As SES grew, managing industrial and environmental services sales, operations, safety, and administration became increasingly difficult to manage—their complex record-keeping was not sustainable as they scaled. They added employees and leveraged their operating systems to expand while pursuing operational excellence.

Their challenge was managing the needs of the environmental services division, specifically, waste tracking or waste management. They used multiple systems to keep customer waste profiles, approve TSDF, print shipping forms, and track waste inventory down to a single drum in their facilities with handheld barcode scanners. All the information and data was captured on paper forms in the field and later entered manually into Salesforce, leading to data entry duplication and interdepartmental inefficiencies. They aimed to solve the issues and fix the disjointed communications among sales, operations, and admin in the back office.



Solution

In searching for a solution to their sales and quoting processes, they turned to FieldFX for efficiency, transparency, and accuracy while eliminating the duplicate entry point where they typed data into one system. With FieldFX, they could eliminate duplicate data, free up admin time, reduce PO overages, and improve compliance with DOT and EPA regulations.

SES began working with FieldFX in July 2019 and separated this project into two phases. The first was to implement within the industrial services group, and the second was pursuing custom development on the Salesforce platform. They wanted to utilize FieldFX objects and tools and third-party apps to meet the waste management requirements of the environmental services division.

Using FieldFX and third-party apps like Boomi, they were able to accomplish everything required on the backend and sync their data into NetSuite. It streamlined their process and made it simpler for the office staff to bill customers quickly by:

- Bringing current customer accounts over and ensuring that the data was the same in both systems, including employees and equipment.
- Pushing invoice data into Salesforce or FieldFX to give the sales representatives a better comparison of the final customer invoice and what happened on the job.
- Improving the sales quoting process's efficiency, transparency, and accuracy and eliminating duplicate data to move into one system.

They continued to make adjustments and enhancements for the organization, transforming and enhancing the capabilities of the environmental services division.

Results

SES managed to achieve growth in their organization while keeping the administration headcount relatively fixed. They eliminated duplicate data entry and freed up admin time that has been redirected to other areas for more efficiency. They reduced PO overages, kept track of POs, and were able to notify the customer more quickly than before. SES also eliminated most paper processes and improved compliance with DOT and EPA regulations through waste objects. Working with FieldFX meant that all the customizations they made over the years helped them to speak the same language.

"[FieldFX] has changed our mindset to working smarter to achieve higher profitability and thinking about problems a little differently, and with a little more firepower behind them in terms of how can we use the software tools at our fingertips to help us achieve our goals."

- Brennon Marcum, SES Data Analytics and Project Manager