TOOLWATCH®

Fleet Management with ToolWatch

Saulsbury needed its asset management system to integrate with its Geotab software to manage its fleet of 180 trucks. With ToolWatch, they capture:

- Asset assignment

- Responsible manager

- Approved Geotag driver

- Employment status

- Last NBR completed Truck data — date created in ToolWatch, license plate, etc.

- Compliance status

- Trailers

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Saulsbury Transforms Asset Management to Improve Operational Efficiency

Situation— Saulsbury Industries, a full-service engineering, procurement, and construction company based in Odessa, Texas, serves the energy and heavy industrial sectors by designing and building safe, well-executed, capital-efficient projects nationwide. With six additional locations throughout Texas, as well as operations in Oklahoma, New Mexico and North Dakota, Saulsbury maintains a vast and varied inventory of physical and geographic assets--all of which must be accounted for timely and accurately.

As the company experienced dramatic growth, it became increasingly apparent that the company's control of its assets and current manual processes were not keeping pace with either time or technology.

Tangible assets like tools, grinders, and other fungible items were accounted for more or less ad hoc by warehouse staff, field management, and job foremen, while the fleet team managed rolling stock like trucks, trailers, and tool vans. Even well into the 21st century, when Saulsbury was already using sophisticated Spectrum and SAP platforms for most internal management functions, inventory control was a hit-and-miss proposition documented with pen and paper on clipboards.

As top management at Saulsbury recognized and reflected on the inefficiencies of their current systems, they determined the perfect solution would manage much more than just company assets. The ideal platform would connect departments and share data in real-time, eliminate redundancies and tedious processes, and maximize company assets to keep Saulsbury competitive and profitable.

So Saulsbury began to search for a software that would integrate with their current systems to manage assets, simplify communications and streamline company operations to help create the highest level of efficiency possible.

Solution— The first step in finding this perfect solution was to assemble a formal, professional asset management team under the direction of Jeff Moncrief, with Sam Stubbs as manager of asset systems and project services. Both had extensive equipment management experience, and Stubbs also had a solid IT background.

Moncrieff and his team began to search for a system to manage Saulsbury's massive inventory, streamline internal processes and eventually grow with Saulsbury to become its enterprise-wide, operations management system. Furthermore, the new system needed to be compatible not only with Saulsbury's existing Spectrum and SAP resource management and planning platforms, but also with its Geotab hardware and software for telematics integration in its vehicle fleet.

ToolWatch Enterprise was the answer to Saulsbury's immediate needs and its long-term goals. In fact, Toolwatch is now essentially the nucleus that ties all company information together from project outset to completion, Stubbs said.

The job start is communicated through accounting and various departments that create a job in Spectrum. The project manager or superintendent will provide an initial loadout list of the tools, equipment, and other materials needed for the project. To expedite the initial field process, the company has created ToolWatch templates with standard loadout items to create pick tickets, eliminating a repetitive and time-consuming task.
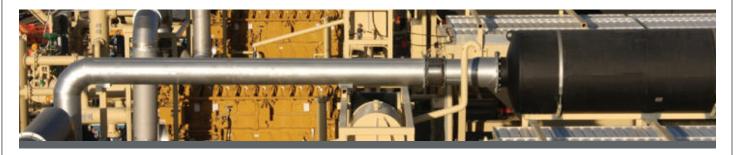
Then, the warehouse team uses the pick ticket to pull items from the shelf, puts them in the tool bin, and informs the supervisor that the tools are loaded and ready to go. Going beyond just asset management, ToolWatch populates pick ticket and fleet information into a centralized location to help the warehouse staff save time and improve visibility.

Finally, ToolWatch's API integration capability creates the location and cost center from the information populated in Spectrum. Within the last year, that integration has become quite deep. ToolWatch captures the parent location, address, supervisor, cost center, cost code, and even the supervisor who approves invoices from Spectrum.

Using the ToolWatch Tool Browser, anyone can look up any asset or information on any project where a Saulsbury employee is the supervisor. That data is always up to the minute, because even if the invoice approver changes during the project life cycle, the current point of contact is always known. That feature is especially useful when a project is winding down and assets are still assigned to that project, so the project supervisor can be contacted to help round up the inventory items.

ToolWatch in Action – To highlight just one success story from the ToolWatch implementation, Matt Saulsbury, Saulsbury vice president, wanted to provide increased visibility to the warehouse by emulating the fast-food restaurant model: provide instant visibility of what is available to order, what's currently being prepared, and what is ready to pick up.

Likewise, Saulsbury installed a 50-inch TV monitor in the warehouse which displays an Excel spreadsheet with real-time pick ticket and fleet information automated from ToolWatch and Geotab. The spreadsheet automatically refreshes from the database every 60 seconds to show updated information in real time — very much like airport flight arrival and departure screens. All relevant information is displayed on the status board so staff members know the current status of Saulsbury's fleet of 180 trucks and exactly what assets are in the field, the warehouse, the yard, and the entire supply chain — as well as the instantaneous cost implications of every data point. Keeping this critical information accurate and up-to-date allows warehouse management to organize inventory, complete pick tickets accurately, and prepare deliveries with efficiency. And in turn, Saulsbury leadership uses the comprehensive view of company operations and assets to make more strategic decisions.

"We couldn't have done that without ToolWatch," Sam Stubbs said. "ToolWatch is the authority of record for where any item is and who is responsible for it, and who is paying for it. ToolWatch seamlessly aggregates all the information from our Spectrum, SAP, and Geotab systems and puts it all at our fingertips, instantly."

Result – By seamlessly integrating all of Saulsbury's various systems, ToolWatch has become the central hub and key to streamlining Saulsbury's company operations. Providing the warehouse and field teams with the tools to operate at peak efficiency helps maximize company assets, eliminate tedious processes and improve enterprise-wide communications.

Now, Stubbs works with almost every department at Saulsbury to ensure that they're utilizing ToolWatch to help keep processes running smoothly and quickly. For example, the human resources department now updates employee information within ToolWatch so the asset management team can track which employees have tools, resources or vehicles assigned to them and equipment doesn't fall through the cracks.

ToolWatch's ability to consolidate enterprise information in real time is the key to operational improvement. Automating processes and integrating systems and data lowers costs, improves communication, mitigates risks and streamlines internal operations by improving productivity and profitability company-wide.