

KLoudGin

EBOOK

# Equipment Sales, Rental, and Service Operations Productivity Re-Imagined

4 Simple Steps to How a Journey to Digital can Drive  
Business Transformation



# Introduction

For decades, paper, whiteboards, spreadsheets, and point solutions have been the primary tools for equipment rental, sales, and service businesses to track assets, manage scheduling and work orders, monitor inventory, and compile project costs for invoice creation.

---

As the pace of business accelerates and more competitors embrace technology, having greater visibility and control over all aspects of the business can be the difference between profitable growth and struggling stagnation.

---

While technology is an enabler, it must be implemented with a view of the future needs of the business. Preparing for shifts toward innovative services such as predictive maintenance, outcome-based billing, personalized service options, and customer self-service will serve as a guide when evaluating enabling technologies.

**This eBook will highlight four key considerations that can transform your business efficiencies and productivity with digitally streamlined processes.**

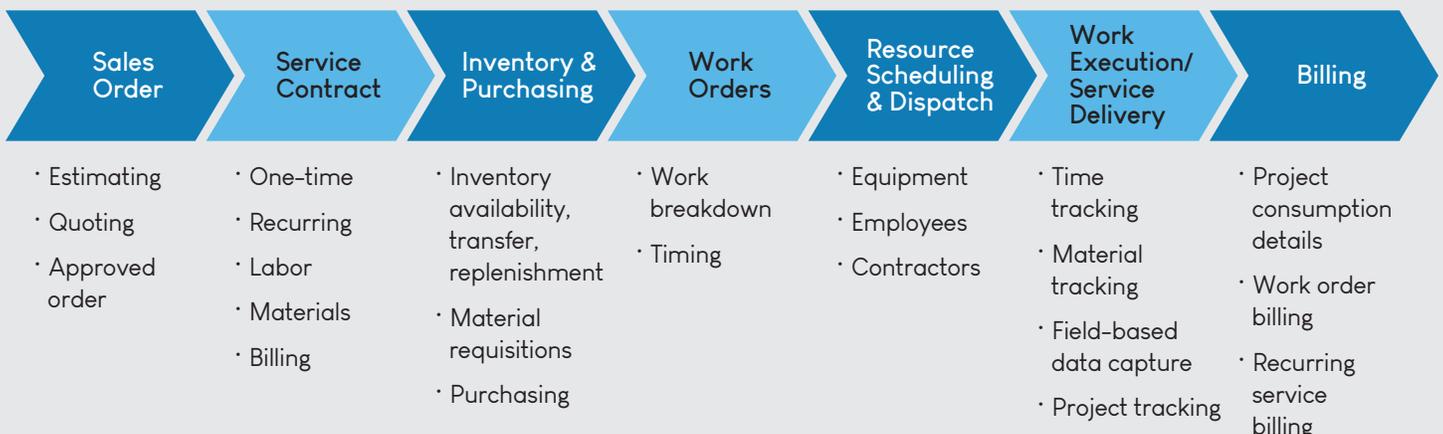
# 1. Consider the Big Picture

## Focus On and Plan to Elevate and Streamline the Entire Process, not Individual Workflows

When considering a move from manual processes to digital, it's tempting to focus on the "low-hanging fruit" – individual workflows that are particularly labor-intensive or prone to errors. Quick-hit workflows might include tracking asset location, operating status and costs, field service work orders, scheduling and dispatch, or inventory management. However, taking a piecemeal approach to process improvement limits the benefits that can be gained from creating an integrated ecosystem that will drive business process transformation. This can also limit automation by creating digital and process silos that rely on human intervention as the connection between systems.

Business processes for equipment dealers, rental organizations and field service providers are highly interconnected, with dependencies from one system to the next. This makes it difficult for the business to execute effectively, manage costs, and mitigate risk. **The real opportunity lies in the benefits to be gained by eliminating information silos – achieving automation of end-to-end processes – gaining visibility across the entire work and asset management work stream.**

### Service Contract-To-Bill Process



## 2. Break Down Silo Bottlenecks, Redundancies and Inefficiencies

### A Single Repository for Asset and Field Work Data Enables a Complete Seamless Process

Asset-intensive businesses, that provide equipment rental, sales, and service, must track and manage the use of their assets as well as manage the field teams responsible for delivering, installing, and servicing the assets.

Traditionally, software providers have created separate solutions for asset management and field services as well as for different classes of work. Yet segregating work in different systems creates blind spots and process complexity for businesses trying to manage costs and optimize field and office-based resources.

Management of assets, work orders, inventory and field service are all interconnected and contribute to service efficiency, costs, and profitability. **Digitization across traditional silos, enabled by a cohesive platform, creates a single source of truth, delivering visibility and control over your business from end to end.**



# 3. Process Automation

## Increate Operational Efficiencies and Employee Productivity

As business complexity increases, manual processes not only slow responsiveness and flexibility, but also increase the risk of errors and revenue leakage. For many asset-intensive businesses, service contracts with customers trigger actions such as purchases of assets and parts, custom fabrication, depletion of inventory, creation of numerous work orders, field team dispatches, and warranty service agreements.

---

With interdependencies across every process, flawless coordination and execution are difficult to achieve and maintain when relying on spreadsheets, paper, and siloed systems.

---

By eliminating system silos, more data becomes available which in turn enables more automation opportunities. Imagine entering the terms of a service contract once and having work orders automatically generated based on job requirements, availability of equipment and labor and/or service commitments. With all elements of the process integrated, inventory can be made available, and costs for service labor and parts across contracts can be synchronized to your financial system automatically.

Alternatively, consider the tedious tasks employees undertake to keep all those manual processes running, the continuous follow-up to determine project status, and constant updates to spreadsheets and other systems. **Automation allows these employees, who know your business best, to engage in higher value work.**

# 4. Enable Business Process Transparency

## Access to Information Empowers All Stakeholders: the More you Know, the More you Grow

Gaps and bottlenecks in processes can cause delays, mistakes, and inefficiencies. Holding employees accountable for outcomes can be challenging when the processes and systems they rely on are fraught with holes and friction.

Providing transparency to processes, data, resource location and status effectively creates a type of “digital transformation” that helps everybody win. Modernizing your operation in this way also ensures your employees, both back office and field teams, have the data they need when they need it.

- Track asset and field team locations on a digital map for improved operations
- Easily deliver work orders, customer account and asset details, instructions, and more using mobile devices
- Capture real-time field data for enhanced work order management and reduced job times
- Inform customers of service status and activity with real-time alerts and notifications
- Access information across the enterprise for better decision making and collaboration



# Conclusion

Processes and systems that work “good enough” when an equipment business starts out often become a liability as the business grows. With the right technology, digital transformation can modernize, streamline, and automate complex equipment rental, sales, and service processes. Digitizing manual processes and centralizing system data improves service reliability, efficiency, and increases operational profitability.

Transforming your rental, sales and service business for operational growth is simpler than you think:

1

Understand your end-to-end process and system dependencies

2

Break down silos of information and organization blind spots

3

Automate all processes to increase operational efficiency and unlock employee value

4

Inform and empower all stakeholders with real-time information and the knowledge to get service delivery right the first time

Your end result will be workflow transparency and revenue growth. This will allow you to be more agile and provide solutions and field service levels that your customers want, need, and appreciate.

# About KloudGin

KloudGin is a trusted provider of the only combined, one-cloud field and asset management solution that connects customers, employees, and assets using AI-powered access to information—on any device. Built for the workers who use it most, KloudGin eliminates traditional information and process silos to enable clients to unify siloed systems, resources, and processes so they can transform the customer experience and improve worker productivity to effectively meet the challenges of today—and the demands of tomorrow.

Ready to see how digital transformation  
can benefit your operation?

Contact a KloudGin industry specialist to learn more.

1-877-256-8303 | [KloudGin.com](https://www.kloudgin.com)



**KlōudGin**  
Smarter Assets. Smarter Workers.™