

CASE STUDY

**Horizon North Logistics
Compresses Order-to-Cash
Processes with Leankor**





The Leankor Solution

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Case Study

Leankor's cloud-based workflow and project delivery solution integrates and synchronizes varied workflows to unify efforts and increase cash flow.



Horizon North Logistics (HNL) provides full service solutions in camp management accommodations and catering, matting and soil stabilization, remote power and energy generation systems, and relocatable and permanent modular structures. They primarily serve the oil and gas, LNG and mining industries, as well as forestry and construction sectors.

Because they provide the services that make a jobsite function well and keep employees comfortable, relaxed and well rested, running behind schedule or missing promised deliverables can prove catastrophic. Efficiency and reliability are key pillars of HNL's success, from the initial quote to on-site assembly and service, to final turn over and repairs and maintenance of equipment. Any delays or setbacks have a significant and immediate impact on

cash flow.

Management decided to use Leankor as their project delivery and workflow automation solution because of its

unique offering of a highly visual interface, paired with the flexibility needed to accommodate disparate workflows and interdepartmental collaboration.

The Challenge

To remain competitive and expand into multiple complementary business lines, HNL required a new kind of integrated customer lifecycle management approach. The new system would need to provide a full stack, cloud-based project management and Customer Relationship Management solution as well as an integrated, globally compatible cloud based collaboration feature that could marry a variety of workflows, to accommodate HNL's dispersed teams.

“We knew that the company would be undergoing significant change through upcoming acquisitions as well as reorganization of work teams to execute on new strategic initiatives,” said Steve Stretch, Chief Information Officer. “Both sales and operational executives wanted an integrated, visual management system to support both Lean transformation operational excellence

as well as improving overall visibility of each and every quote-to-cash customer engagement cycle.”

Team leaders found the ideal order to cash solution they were searching for - one that would optimize the relationship between sales operations and manufacturing & delivery teams, providing the customer with one, cohesive & highly professional systematic experience - with Leankor.

Sales, Operations and Construction teams are now all able to synchronize their varied workflows and methodologies, including any custom-designed solutions that are present for a single team or even single employee. Leankor's visual interface enables employees to stay updated on the status of any project pertaining to their responsibilities by offering workflow automation; updates reach system-wide, notifying appropriate

members when steps are executed. This increased transparency, accountability and

efficiency has had a significant impact on product delivery at HNL.

HNL turned to Leankor and Salesforce to deliver an integrated, cloud-based CRM, visual workflow solution and project management platform that could be deployed immediately, but enhanced and expanded over time to suit business needs.





The Leankor Solution

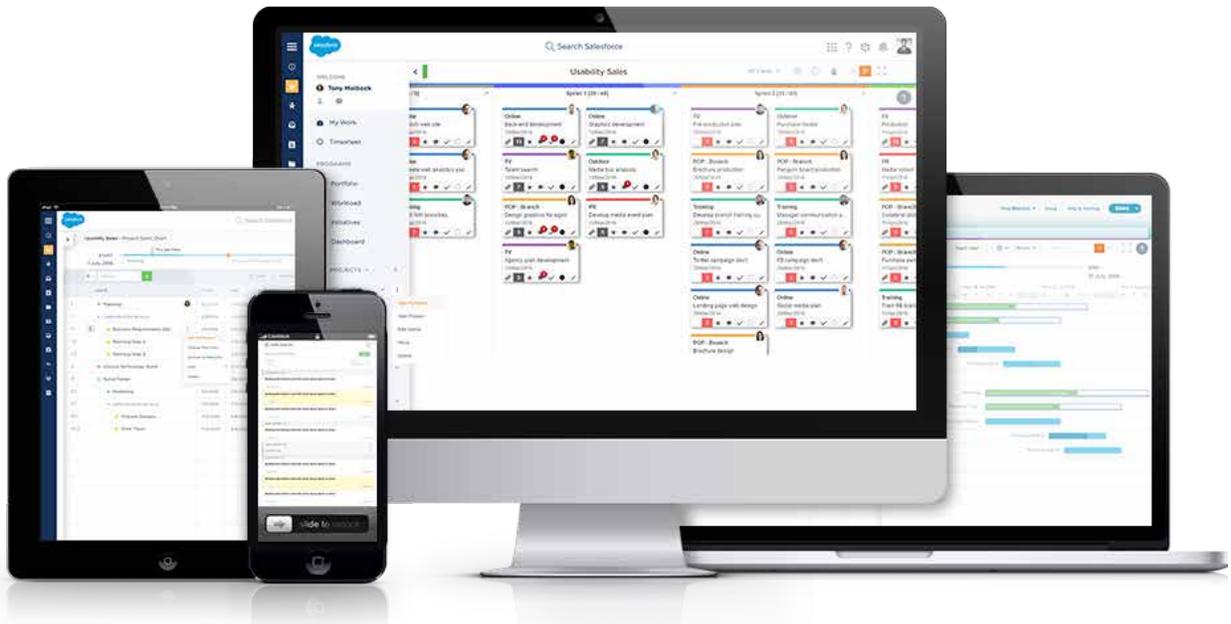
Leankor was selected based on its premium user experience that catered to the needs of both sales and field operations, ease of deployment, and customizable workflow platform that enables

both automated business processes and human-interactive visual management. After an easy installation and configuration process, Leankor was operational at HNL within a few short weeks.

Visual Workflow

Leankor’s project workflow software offers a space for digital Kanban or other visual project boards, enabling individual productivity improvements as well as improved management visibility into the health of business operations. The solution is very similar to physical “lean

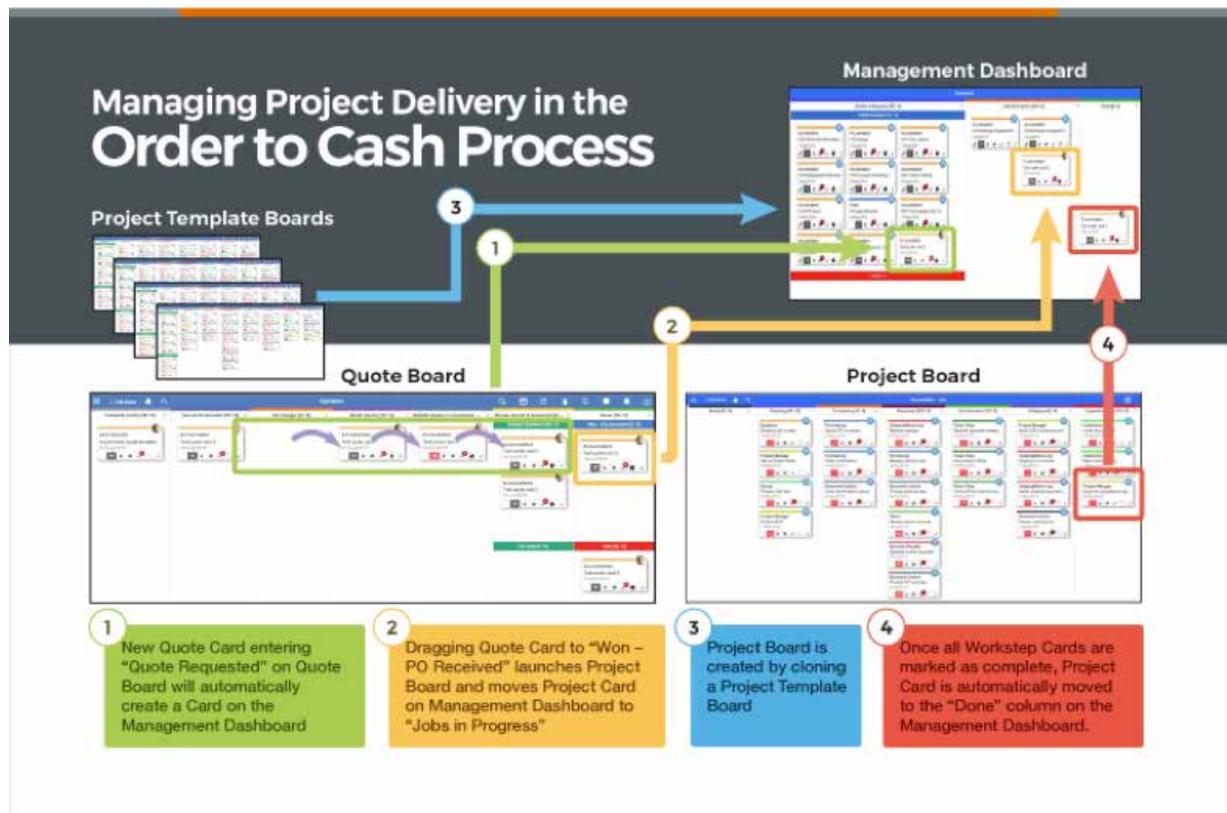
visual control boards,” so much of the employee operational excellence training could be leveraged in understanding how the digital workflow solution is implemented in their day-to-day work.



Visual Workflow Boards

Through the combination of workflow automation and human interface visual management with kanban boards, organizations can better manage their flow of work from an initial quote board through the production and

delivery process. Each stakeholder group has boards specifically designed for their needs, and workflow automation is triggered when cards are moved into specific columns.



Improved Visibility of Engineer to Order Process

Leankor's integration with Salesforce was an important factor in HNL's decision to purchase, as it allowed each change in opportunity stage to be monitored and discussed between sales and delivery teams.

This was especially critical when working with geographically dispersed teams during the Engineer-to-Order (ETO) process. The ability to coordinate with teams across functions was absolutely essential to ensure proper configuration and pricing of products and services to protect gross margin.

Integration of Order-to-Delivery Teams

Leankor's automated update delivery, which allows cross-departmental collaboration and visibility, eliminates the potential for human error and delays when communicating the status of projects.

For HNL, this means that, for example, when a salesperson completes an order, the manufacturing and site delivery teams are automatically notified of that completion, resulting in a more efficient allocation of resources.

Deployment of Standard Work Practices

In order to maintain and improve overall customer satisfaction through on-time, high-quality deliveries, HNL needed a way to standardized expectations regarding work process and deliverables across all product and service lines. Leankor allows for work templates to be established for a variety of processes such as RFPs, quotes, and more.



Do Great Work, Together, with Leankor

Workflow and project management should never be separated - they're two sides of the same coin. With Leankor, you organize workflows, manage projects, mobilize teams and track progress throughout your organization with one simple app.



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