CASE STUDY

CUSTOMER
DJ Adair Crane Services

INDUSTRY
Construction

CHALLENGE
Inefficient booking system & onerous manual invoice processing

OUR SOLUTION
Job Allocation, Invoice & Docket workflow automation, Employee E-Learning management

OUTCOME
Improved safety compliance, greater efficiency & enhanced customer experience

STREAMLINED OPERATIONS WITH UPSTREAM

DJ Adair Crane Services, recently acquired by Two Way Cranes, is an owner-operated mobile crane hire company based in the Blacktown area of Sydney, New South Wales. For the last 30 years, DJ Adair has provided efficient, personalised service with an emphasis on attention to detail and safety.

MANAGING BUSINESS COMPLEXITIES

Despite growing significantly in the three decades since its establishment, DJ Adair continued to use manual, handwritten processes to manage the complex compliance and safety requirements inherent in the crane hire industry.

When a customer would hire a crane, a DJ Adair employee would fill out a carbon book of dockets to track how many staff were involved, how long the crane and staff were onsite, which crane was used, and so on. The customer would sign the docket, which would then be taken back to the office to be keyed into DJ Adair's accounting system, MYOB.

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— *Amanda Adair* —
Director

To send invoices, the team would print out all the invoices from MYOB, find the associated copy of the original, handwritten docket, photocopy it, then post the photocopy and the invoice to the customer for payment.

When it came to managing the movement of the cranes and allocating staff to the job, the DJ Adair team used huge spreadsheets that were printed on massive pieces of paper and spread out across the boardroom table. The team could then discuss the day's movements based on this matrix of cranes and staff. However, this created challenges around ensuring that the nominated staff member was licensed to operate that crane and had been inducted to work at that site.

Amanda Adair, Director, DJ Adair Crane Services, said, "Each site has different entry requirements in terms of onsite inductions, work cover compliance, licenses, and so on. We couldn't send someone to site that wasn't authorised to operate that crane at that location. If there were any problems with the paperwork, the crane or the operator wouldn't be allowed on site. That would mean costly delays and wasted time."

DJ Adair needed a solution that would simplify and automate all of these processes to avoid the potential for errors, the need for rework, and the inefficiency caused by manual tracking.

Amanda Adair said, "Although we knew the manual system wasn't working, it was difficult to find a digital solution that really fit our needs. Because DJ Adair operates in a niche area, there weren't really any off-the-shelf solutions for transport or construction that did exactly what we wanted. We trialled half a dozen options and, while some came close to solving our challenges, others actually made our processes much harder, and none were an exact fit."

FINDING A COMPREHENSIVE SOLUTION

DJ Adair searched for a solution that would link all information regarding crane hire, compliance, licensing and invoicing together in a single system. It needed to combine a full safety and compliance tracking system with a job allocation system that would let the business better manage its cranes, vehicles, and staff.

DJ Adair met with Upstream about its needs and found that they were able to create a perfect fit, with a tailored Upstream and M-Files Solution.

One of the first things the team appreciated about the solution was that it accommodated DJ Adair's way of working, which was to take bookings based on what customers needed rather than on what the business had available. If necessary, DJ Adair would subcontract out to other businesses, but most off-the-shelf solutions didn't account for that possibility. The solution lets DJ Adair make the booking and allocate cranes and staff members later. It also stores subcontractor information in the system.

Amanda Adair said, "Fortunately, the team at Upstream grasped what we needed very quickly. In one of the first versions of the solution they showed us, we could see that we were on the same page and what they were developing was exactly what we needed. This was important for us because we weren't sure how well we'd be able to go from a completely manual process to an online, automated system. But Upstream made it very easy."

INVOICE & WORK DOCKET AUTOMATION

Using M-Files, the Upstream solution scans dockets into an archive and associates the docket numbers with the invoices that are subsequently generated against the job. These are automatically grouped together through M-Files workflows, which then sends an email to the customer with the invoice and the associated dockets. Previously a manual, multi-step process that took days, sometimes weeks to complete, is now instant and automated.

SEAMLESS OPERATIONS WITH AUTOMATED WORKFLOWS

The solution provided by Upstream has dramatically simplified many processes and workflows for DJ Adair, leading to more accurate and efficient work.

The automated docket and invoice linking system has saved DJ Adair two full days per month of administrative work, since employees no longer have to manually find paper dockets and link them with invoices.

JOB ALLOCATION AUTOMATION

Furthermore, the system lets DJ Adair automatically generate daily job allocation sheets digitally, then SMS staff members with notifications to tell them where they need to be, at what time, and any special requirements for the job. This saves the allocation manager hours daily in compiling and sending individual text messages to drivers. Staff members can see their entire job allocations in advance, letting them plan their workload.

Amanda Adair said, "From a management point of view, we can look at a view and see all the jobs that are scheduled for the week. This gives us a better understanding of workloads so we can see sooner whether we need to outsource jobs to other crane companies."

EMPLOYEE E-LEARNING & INDUCTION MANAGEMENT

The solution also lets DJ Adair create its own training content to certify staff members in certain topics, such as safety inductions, vehicle maintenance and compliance.

Amanda Adair said, "Offering training online is a very simple process and we can customise it very easily. If new types of training are required, we can develop it in-house. Staff members can complete the training and receive reminders when they need to refresh their training or renew their certifications. This helps manage compliance more effectively.

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"We also manage our integrated system of health and safety, quality, and environmental documentation in the same system. Managers can work with documents in the system and their changes are reflected live, which means there's no confusion or version control issues. This has made it incredibly easy for auditors and we've had comments from accreditors regarding how easy it is for them to see that we're actually doing the things we say we are in our documents.

"The solution speeds up the audit completion making the process easier, faster and more enjoyable for both auditors and staff."
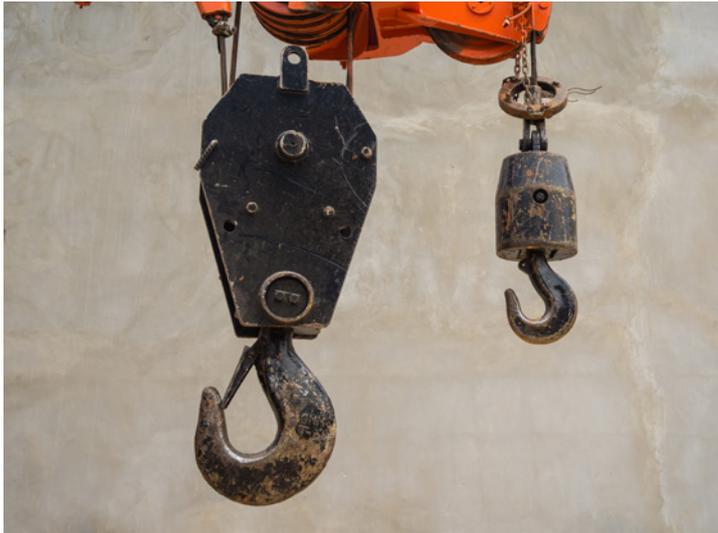
THE BOTTOM LINE

- Improved accounts payable by digitising and automating processes

- Improved job management by linking certification information with job allocations

- Reduced potential for errors, delays, and unnecessary costs

DJ Adair can still manage invoicing through its core accounting software but Upstream has added a workflow whereby invoices automatically attach to booking information. This allows the team to continue to manage its accounting through MYOB while using M-Files to see exactly where any job is up to at a glance. This improves customer service and responsiveness, and lets DJ Adair continue to improve its project management capabilities.

SIGN ON GLASS TECHNOLOGY

In the future, DJ Adair plans to move its solution to the cloud and implement Upstream's Sign on Glass solution, which will help streamline the work docket process and onsite paperwork. While most of this is managed through M-Files, physical signatures are still required sometimes. The Sign on Glass solution provided by Upstream will help DJ Adair save more time on site, digitise paper and have immediate information access, while completing its compliance obligations.

Amanda Adair said, "For us this solution has been a saving grace. Upstream has helped us take a manual, handwritten system to one that's automated and streamlined. Working with Upstream has delivered a solution that solves many of our challenges and helps us work more efficiently."

UPSTREAM HELPS BUSINESSES WORK SMARTER, DIGITALLY

With a history spanning over 30 years in the print and document management industry, Upstream is one of Australia's leading content, workflow and print management solutions companies.

Our strengths lie in understanding the immediate and long-term goals for improving processes and reducing paperwork, data entry and duplication, effectively streamlining and optimising workflow. We deliver flexdible, cost-effective solutions that alleviate your administrative burden and provide real value to your business.

Upstream's suite of award winning products are uniquely tailored to suit your business needs.

Our solutions include workflow, content management, 'Smart' barcode forms, cost recovery, regulatory compliance, and print management to name a few. We specialise in business processes such as POD, HR onboarding, Accounts Payable automation, Sign on Glass mobility solutions, as well as having extensive experience in document storage and retrieval.

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