Central States Thermo King

Delivering higher margins and better customer experiences through process automation

Central States Thermo King (CSTK) is a leading solution provider to the transportation industry, focusing on applications including Thermo King transport refrigeration units, comfort systems, auxiliary power units, customized truck bodies, and much more. CSTK Inc. has 287 total employees and generates $34.42 million in annual sales (USD). Their 18 companies operate independently but rely on CSTK's IBM® i-based ERP system for processes like invoicing and ordering parts for customer projects. Velociti, CSTK's in-house IT services business, utilizes Salesforce to track work orders, materials, and billing, but must ensure all data is synchronized between the applications.

Challenge

While a tool like Salesforce drives customer-centric activities, applications on CSTK's IBM i were the single source of truth for all things financial. Because all transactions, invoicing, and financial forecasting data had to be officially recorded and stored within an IBM i general ledger application, this led to additional workloads for both companies. For every work order or financial transaction, Velociti's data entry staff manually entered the data both in Salesforce and the general ledger. Not only was this time consuming and a bottleneck for other activities, it also introduced errors. Altogether, manual data processing and correction, for just a few essential transactions, amounted to more than $200,000 in additional costs each year, while also introducing room for error.

The IT team initially considered replatforming or upgrading core IBM i applications to integrate with Salesforce directly, but this was costly and would introduce much risk to operations. Don Platt, Director of IT, at Velociti, explains "It would have cost us a million dollars a year to replatform, just to enable microflows (automated business processes) between the systems." Instead, the team took inspiration from their in-house culture of lean automation and searched for a solution that would allow them to build and manage APIs on the IBM i platform. After much research, their search led them to an off-the-shelf solution, Rocket® Process Automation.

Solution

The Rocket solution was the perfect 'medium of visibility' for the IT team, allowing them to embark on a discovery process to understand how data flowed between both companies. This provided valuable insight into the many end-to-end workflows and processes that were vital to daily operations. "Our microflows aren't linear. There are many moving parts, from exceptions to data fields, to even people," Don explains. "With the visibility on the Rocket platform, we can back out of a process, see what needs improving, and then take action."

More importantly, this process insight allowed the IT team to prioritize which processes would benefit most from automation, based on factors like their value to business operations, process speed, and frequency of use, either by employees or customers.

One of the first projects the team took on was to automatically track costing data for work orders created on Salesforce and push that data via APIs into the general ledger to create an associated cost ticket. This allows relevant departments to keep a constant eye on project costs, speed up financial reporting and lower the risk of overspending. (...)

(...)

Invoicing is another priority to transform with API-based microflows. The central general ledger was unable to properly process the sheer volume of taxable events from Velociti's business operations, which happens across multiple states, municipalities, and even countries. Leveraging Rocket Process Automation, Velociti built microflows that funneled invoice data to Salesforce, where third-party tax solutions can be leveraged to execute more precise taxation for every project.

Results

The cost benefits have been substantial for both CSTK and Velociti. For starters, both entities have been able to maintain their respective core system platforms, along with the essential processes, business logic and integrations within them. The automation microflows that Velociti implemented have freed the workforce of both companies and allowed them to channel time and effort into higher-value tasks.

For CSTK specifically, the added benefit is the huge possibility of leveraging automation for all data-heavy tasks moving forwards. "We've discovered how easy it is, with Rocket, to take repetitive high-volume database queries and put them behind an API microflow," says Don. "With Rocket Process Automation, we finally have that single pane of glass we've always desired to learn, build, and improve microflows between CSTK's IBM i platform and Velociti's Salesforce. With every endeavor now, we depart legacy green screen processes, and leverage a more modern, efficient, and productive automation process at the front end."

> "We've discovered how easy it is, with Rocket, to take repetitive high-volume database queries and put them behind an API microflow. With every endeavor now, we depart legacy green screen processes, and leverage a more modern, efficient, and productive automation process at the front end."

Don Platt
Director of IT, Velociti

CSTK_CaseStudy_v3