

## Heatcraft automates business process workflows for compliance and efficiency




---

### Overview

---

#### ■ The Challenge

Heatcraft, a leading manufacturing and wholesale distribution business serving the refrigeration and air conditioning trades, was hampered by its paper-based business processes. A simple purchase requisition could take up to two weeks to process, adversely affecting operational efficiency. Heatcraft recognised that it could not respond quickly to changes in the market unless it upgraded its internal systems.

#### ■ Solution

ISW helped Heatcraft implement Workflow-XPress on top of IBM® Lotus® Domino®. Workflow-Xpress is a web-based application, developed by ISW, that models business processes,

ensuring that all staff can more efficiently perform common tasks. It speeds previously manual processes, offering productivity and efficiency gains for the organisation.

ISW provided Heatcraft with initial training in the product, after which Heatcraft developed further training for its staff, and modelled and implemented the workflows for its business processes.

#### ■ Benefit

Heatcraft has not only sped up execution of business processes, delivering productivity benefits, but has also ensured that business processes are completed the same way regardless of the location in which they're performed. This consistency is important as the company has more than 70 business locations. The new system also offers

the ability to report on compliance with business processes, which is important in the US, where the company is required to conform to Sarbanes-Oxley (SOX) legislation.

#### Key Learnings

- Pilot projects ensure the business knows what to expect and gain early acceptance before full-scale implementation commences.
- A smart choice of web-based tool offers opportunities to selectively provide systems access to third parties such as suppliers.
- Mapping businesses processes first, before developing the workflow in Workflow-Xpress, allows for user input before investing implementation time.

## Heatcraft Worldwide Refrigeration

Heatcraft Worldwide Refrigeration is a global leader in commercial refrigeration serving over 70 countries worldwide, building its vision of being first choice in refrigeration. Driving to set the global benchmark for customer service, Heatcraft aims to be at the forefront of sustainable technologies, providing innovative refrigeration solutions that enhance the way we live.

As part of Heatcraft Worldwide Refrigeration, Heatcraft Australia continues to be one of the country's leading wholesale distribution businesses catering for the refrigeration and air conditioning trades. Heatcraft Australia employs over 500 people and boasts a distribution network of over 70 branch outlets across Australia and New Zealand, supported by a manufacturing plant in Sydney.

*“The stability, security and ease of use of the IBM Lotus Domino platform makes it the easy choice when it comes to application development and deployment. Heatcraft needed the most resilient and secure environment for its business process environment ... and Lotus Domino delivered.”*

*Tim Royle, Executive Director, ISW*

The Heatcraft Australia vision is to be the market leader in temperature and climate control solutions.

### The Business Problem

Heatcraft's internal processes were slowing down both day-to-day operations and the company's ability to innovate and respond to market demands. Staff time was taken up in manual processes, which were hard to replicate across the organisation's 50-plus offices.

In the US, SOX non-compliance was an issue, with between 20 and 30 issues reported in 2006.

### Solution – IBM and ISW

Heatcraft had an existing relationship with ISW, and approached them for help in solving these critical business issues.

After working with Heatcraft to understand the scale of the problem, ISW recommended that Workflow-Xpress be deployed across the organisation. “The stability, security and ease of use of the IBM Lotus Domino platform make it the easy choice when it comes to application development and deployment. Heatcraft needed the most resilient and secure environment for its business process environment ... and [IBM] Lotus Domino delivered,” said Tim Royle, Executive Director, ISW.

ISW helped with the initial mapping of business objectives and processes into workflows within the system, and with a brief period of training saw Heatcraft IT staff rapidly able to implement workflows.

Glenn Zeall, Manager Operational Excellence, Heatcraft Worldwide Refrigeration, Heatcraft Australia Pty Ltd said that, “Successful implementation of the workflow system starts with understanding the business objectives and the business process before turning to technology.”





"The ease with which Heatcraft took ownership of the system was impressive. Heatcraft designed and implemented its own workflow with two days of training," said Tim Royle.

Initial workflows were implemented based on performance. Now, business groups submit their requests for workflow modelling and these are implemented as time and resources allow, again prioritised by benefit to the business.

Workflow delivery is now included in senior monthly management reports as a key measure of business performance.

#### **Business Benefits for Heatcraft**

Heatcraft reports that its staff are now able to consistently apply business processes, no matter where they are

*"Workflow-Xpress has proven to be an intuitive and dynamic product which, when combined with access to a large user community, has enabled our programmer to deliver solutions to meet the business needs."*

*Glenn Zeall, Manager Operational Excellence,  
Heatcraft Worldwide Refrigeration, Heatcraft Australia Pty Ltd*

located. Productivity has been greatly improved, allowing staff to accomplish more in less time.

Heatcraft has also opened up Workflow-Xpress to selected third-party suppliers to further streamline procurement processes.

Since its implementation, nearly 60 workflows have been modelled. According to Glenn Zeall, "Workflow-

Xpress has proven to be an intuitive and dynamic product which, when combined with access to a large user community, has enabled our programmer to deliver solutions to meet the business needs."

In 2009, there were no SOX compliance issues reported, a significant achievement. "A measure of a successful project: zero SOX non-compliance report for 2009," said Glenn Zeall.

*"A measure of a successful project: zero SOX non-compliance report for 2009."*

*Glenn Zeall, Manager Operational Excellence,  
Heatcraft Worldwide Refrigeration, Heatcraft Australia Pty Ltd*



## About ISW

ISW is an Australian company committed to achieving excellence in the design, development, implementation, training and support of IT software and services. ISW strives to provide robust practical solutions to its clients' business requirements and to support them throughout the complete project life cycle and beyond.  
[www.isw.com.au](http://www.isw.com.au)

## About IBM

IBM Lotus Domino software is a world-class platform for critical business, collaboration, and messaging applications. It delivers highly reliable, scalable, and security-rich applications at a low total cost of ownership, helping companies enhance the productivity of people, streamline business processes and improve overall business responsiveness.  
[www.ibm.com](http://www.ibm.com)

## For further information from IBM

If you would like to speak with an IBM Sales representative please call **132 426** (in Australia) or **0800 801 800** (in New Zealand) or visit us at:  
[ibm.com/au](http://ibm.com/au)  
[ibm.com/nz](http://ibm.com/nz)

## For further information on ISW

If you would like to speak with someone from ISW please call **1800 456 001** (Australia), email: [sales@isw.net.au](mailto:sales@isw.net.au) or visit: [www.isw.com.au](http://www.isw.com.au)

## For further information on Heatcraft

If you would like to speak with someone from Heatcraft please call **+61 2 9774 7155**, email: [info@heatcraft.com.au](mailto:info@heatcraft.com.au) or visit: [www.heatcraft.com.au](http://www.heatcraft.com.au)



© 2010 IBM Australia Limited  
ABN 79 000 024 733

All Rights reserved

IBM Australia  
55 Coonara Avenue  
West Pennant Hills  
NSW 2125

Printed in Australia

IBM, the IBM logo, [ibm.com](http://ibm.com), Domino and Lotus are trademarks or registered trademarks of International Business Machines Corporation in the United States, other countries, or both. If these and other IBM trademarked terms are marked on their first occurrence in this information with a trademark symbol (® or ™), these symbols indicate U.S. registered or common law trademarks owned by IBM at the time this information was published. Such trademarks may also be registered or common law trademarks in other countries. A current list of IBM trademarks is available on the Web at "Copyright and trademark information" at [ibm.com/legal/copytrade.shtml](http://ibm.com/legal/copytrade.shtml). Other product, company or service names may be trademarks or service marks of others.

This customer story is based on information provided by Heatcraft Australai and ISW and illustrates how one organisation uses IBM products. Many factors have contributed to the results and benefits described. IBM does not guarantee comparable results elsewhere.

The information in this case study has been provided by ISW. IBM is not in a position to verify the accuracy of the information or any claims made by third parties. Warranty, service and support of non-IBM products are provided directly to you by the manufacturer, supplier and publisher of the product. Subject to any rights which may not be excluded or limited, IBM makes no representations or warranties regarding non-IBM products or services.

\* Business Partner is used informally and does not imply a legal partnership.

## Important Privacy Information

If you or your organisation would prefer not to receive further information on IBM products, please advise us on: 132 426 (Australia) or 0800 444714 (New Zealand). If you would like IBM Australia Limited to refrain from sending you commercial electronic messages you may send an unsubscribe message to [contact@au1.ibm.com](mailto:contact@au1.ibm.com)[or click the link below: (marketing may include address generated by ezVRM system)]. The sending of this message was authorised by IBM Australia Limited, and IBM Australia Limited can be contacted at [mrc@au1.ibm.com](mailto:mrc@au1.ibm.com) or on 132 426 (Australia) or 0800 801 800 (New Zealand). IBM may store data on international servers used by it.