

## Slick & Xeo



### BACKGROUND

Xeo's client is a serial entrepreneur who founded an automotive service startup based in Maryland. The company operates a fleet of trucks and provides automotive services to fleets across the United States. Despite being a relatively new entrant in the market, the startup has quickly expanded its footprint by opening locations nationwide.

### CHALLENGE

The company faced several operational challenges as it scaled. Firstly, they needed a comprehensive platform to capture and manage vehicle data. This system had to track maintenance issues for each vehicle. Additionally, the company required an efficient dispatching system to manage its fleet of trucks and vans. This system needed to accurately compute the workload on each shift and track which employees and vehicles were assigned to each shift.

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### SOLUTION

#### • Dispatching

First, Xeo developed a comprehensive dispatch board that revolutionized the scheduling processes. This system clearly represented labor distribution and workload, helping dispatchers match staffing to the workload. Furthermore, Xeo integrated with Google Maps to optimize routing and automatically import drive times into the schedule.

#### • Monitor Financial Performance

Labor costs account for the lion's share of operating expenses, and managers need practical tools to monitor and control these expenses. Therefore, Xeo integrated with the client's existing time card software. By correlating time card data with shift and labor cost information, managers know precisely how profitable each shift is in real time, ultimately improving their bottom line.

#### • Billing Automation

Previously, billing was a labor-intensive task that required manual data entry and reconciliation. So, Xeo coded the system to push invoices into QuickBooks Online automatically. This integration eliminated manual errors, reduced administrative workload, and accelerated the billing cycle. Now that the company is transitioning from QuickBooks to NetSuite, a more comprehensive enterprise resource planning (ERP) system, Xeo is preparing to update the billing integration to ensure a seamless transition.

#### • Inspections and Workflow

Quality assurance is a significant challenge with technicians working in remote parking lots across the country. Xeo built a customizable workflow and inspection system. Administrators configure inspections and workflow tailored to the unique needs of each fleet. During the shift, the software guides technicians through their work step-by-step. Techs record measurements and capture videos and photos directly within the system. This multimedia capability allows for detailed documentation of the vehicle's condition. Additionally, the system automatically creates issues when measurements indicate that remediation is necessary.



Xeo then built a monitoring module for the company's maintenance chief, which provides access to all media and data captured by technicians nationwide. This feature enables the maintenance chief to oversee and verify work quality in real time, dramatically improving quality assurance.

- **Service Schedule**

Vehicle maintenance often depends on the age or mileage of the vehicle. To manage this efficiently, Xeo developed a service schedule module that automatically downloads the recommended service schedules provided by Motor, a third-party data provider. Xeo also integrated a telematics solution to track each vehicle's current odometer readings. This seamless integration allows the system to accurately determine when maintenance is due based on the vehicle's mileage.

- **Native App**

Recognizing that drivers also have valuable insights into the condition of fleet vehicles, Xeo developed native applications for iPhone and Android devices. These applications allow drivers and fleet managers to conduct inspections and report issues, improving communication between drivers and maintenance personnel.

- **Fleet Dashboard**

To provide fleet managers with comprehensive visibility, Xeo developed a robust dashboard. This feature helps managers quickly identify the most pressing issues at a glance. Less urgent issues are forecasted based on each vehicle's driving history. The dashboard provides a clear overview of all scheduled maintenance and the status of each vehicle within the fleet. This transparency ensures that all stakeholders are well-informed and can make timely decisions.

- **Service History**

Xeo also included a service history module to provide a holistic view of vehicle maintenance. This feature allows fleet managers to input service records from third-party maintenance shops, consolidating all maintenance data into a single source of truth. By centralizing this information, fleet managers can easily track the complete service history of each vehicle regardless of service provider, ensuring transparency and accuracy in maintenance records.

## RESULTS



These features continue to improve our client's operations. Integrating real-time vehicle data, accurate scheduling, and automated billing has led to substantial operational efficiencies. Understanding their profitability per shift was a "game changer."

## CLIENT REFLECTION

Our client has successfully closed the second round of funding, a testament to the business's growth and the value of the solutions implemented. We are grateful to have led the software development efforts and look forward to adapting the system to new challenges and opportunities.

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