



# ISO Profile: Davis Controls

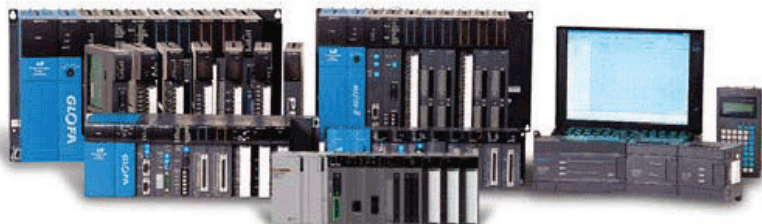
**“With Synergy, our training matrix is updated everyday, in real-time. As a result, our individual resource records are far more comprehensive when it comes time for our audit.”**

Founded in 1933, Davis Controls is a distributor, representative and licensed assembler for international manufacturers of instrumentation and control products. The company offers a comprehensive range of products for the industrial market. In addition to representing a world-class portfolio of suppliers, Davis also manufactures Klinger magnetic level gauges and supplies them across the continent through a network of local distributors and representatives.

The company’s relationship with Exact Software™ dates back to 1996, when Davis first implemented Exact Macola® ERP to replace an archaic legacy information system. Over the past ten years, Davis has made several additional investments in Exact technology, including Exact Synergy®, a Web-based business management solution; Exact Event Manager™, a business activity monitoring (BAM) application; and most recently Exact Business Analytics™ (EBA), a powerful business analytics and reporting tool. These integrated solutions have enabled Davis to streamline business processes and achieve significant efficiency and productivity gains, helping the company maintain a static headcount despite a threefold increase in revenues over the ten-year period.

## Addressing the challenges of ISO compliance

Synergy, in particular, has provided Davis with the means to address numerous business needs, from capturing and maintaining information throughout the customer lifecycle to more efficiently managing workflow, with increased visibility and accountability across the organization. These capabilities have also been critical to the company’s ongoing efforts to maintain compliance with ISO 9000, a set of standards for quality management



### Business Issue

As a distributor, representative and licensed assembler for international manufacturers of instrumentation and control products, Davis Controls needed a framework for their ongoing efforts to maintain compliance with ISO 9000, a set of standards for quality management that encompass areas such as proper record keeping, customer feedback, training and development, and continuous improvement.

### Impact

Through their use of Exact Synergy, Davis Controls has been able to leverage their existing technology investments to meet the critical compliance requirements set forth by ISO 9000.

### Solution

Exact Synergy® has provided Davis with a framework to manage their quality management that encompass areas such as proper record keeping, customer feedback, training and development, and continuous improvement.

### Results

- All corporate data is integrated and consolidated onto a single database, enabling quick drill downs into account specifics and customer interactions.
- Document management capabilities allow for effective management of policies and procedures, ensuring that the latest information is available to employees.
- Synergy’s HRM component enabled Davis Controls to establish a training module to identify, implement, and track employee training programs that help their employees develop the competencies needed to excel on the job.

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Because Davis Controls is primarily a distributor and does very little manufacturing, the company's ISO 9000 compliance process revolves primarily around "connecting the dots," says Neil Montgomery, Davis' president and CEO. "We have to see and understand the relationship between notes taken from our first contact with a customer and the various interactions and documentation from quotes all the way through to the shipment of orders."

The ISO audit process has become quite painless for Davis Controls as a result of Synergy's ability to integrate and consolidate all corporate data into a single database. "We can pull up a customer account for the auditors and immediately show them all of the interactions related to that account, including emails, quotes, faxes, etc." says Montgomery. "In addition, we can quickly drill down into the transaction specifics, such as the customer order, the purchase order, the shipping documentation, even the scanned check we received as payment."

Synergy's document management capabilities have also helped Davis manage aspects of ISO 9000 related to its policies and procedures. With the solution's version control functionality, for instance, only current, active documents are visible to users in the system. This helps to ensure that employees are accessing only the most recent versions of policies, procedures, forms and other important 'controlled' documentation.

## Ensuring that employees develop necessary skills

A third key aspect of ISO 9000 compliance for Davis Controls is the ongoing training and development of its workforce. Because all employees work in Synergy in some capacity, the company has developed a series of 25-30 one-hour training modules covering various aspects of the



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system, including workflow, document control, quoting, filing expense claims, registering support requests, Website maintenance and so on.

Davis has also constructed a training matrix that outlines the various job descriptions within the company as well as the specific areas of Synergy that are applicable to those functional roles. As a result, employees can easily identify the necessary skills and then register for the appropriate training modules. "If they don't know it, they'll avoid it," says Montgomery. "Whether an employee is new or just stuck somewhere in the system, the training matrix helps ensure they develop the competencies needed to excel on the job."

Once employees register for a training module, a workflow is initiated within Synergy and routed through the company's trainer, automatically updating the Matrix in the process. Certificates from outside training and professional development workshops are scanned into the system and attached to the file as well.

"Some companies are still in the mindset of making an effort to improve the education and skill sets of their employees and then update their training records the week before the ISO audit," says Montgomery. "With Synergy, our training matrix is updated everyday, in real-time. As a result, our individual resource records are far more comprehensive when it comes time for our audit."

"The auditors come in expecting paper-based systems," adds Montgomery, speaking of the ISO 9000 process in general. "They're truly surprised by what we're able to do with Synergy. As a mid-market company, we're thrilled with the fact that we've been able to leverage our existing technology investments to meet these critical compliance requirements."

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