

Case study | AB Equipment

# How AB Equipment went **from siloed processes to unified performance**



**annata**  
Powering possibilities



## A legacy of excellence in industrial equipment

Founded in 1878, AB Equipment has solidified its position as a premier multi-brand **supplier of industrial equipment in New Zealand, specializing in materials handling, construction, forestry, and city maintenance**. With a robust nationwide network of 18 branches, the company provides around-the-clock service support and genuine replacement parts, ensuring seamless operations across the country.

## A commitment to delivering equipment innovation

AB Equipment's commitment to originality and enterprise has been the driving force behind their success, enabling them to **deliver best-in-class brands and equipment with 24/7 support**, ideal for New Zealand's tough terrain.

Their top global brands, including **Toyota, Develon, Tigercat, Sumitomo, Bucher Municipal**, and more, are world-class machines that are guaranteed to deliver. AB Equipment is dedicated to providing its customers with the latest innovations, ensuring they can operate on the world stage with confidence.



# Adversities with **legacy processes**

AB Equipment faced significant operational challenges as it sought to modernize and streamline its business processes. **Their field service and maintenance operations were highly manual, leading to inefficiencies and potential delays.**

Additionally, their existing **Integrated Dealer Management System (IDMS), which was heavily customized,** could not **consolidate equipment data effectively,** hindering predictive maintenance efforts and overall performance optimization.

They **needed to consolidate data from their machines to enable effective predictive maintenance,** ensuring optimal performance across their equipment fleet and maintaining high standards for the brands they service.

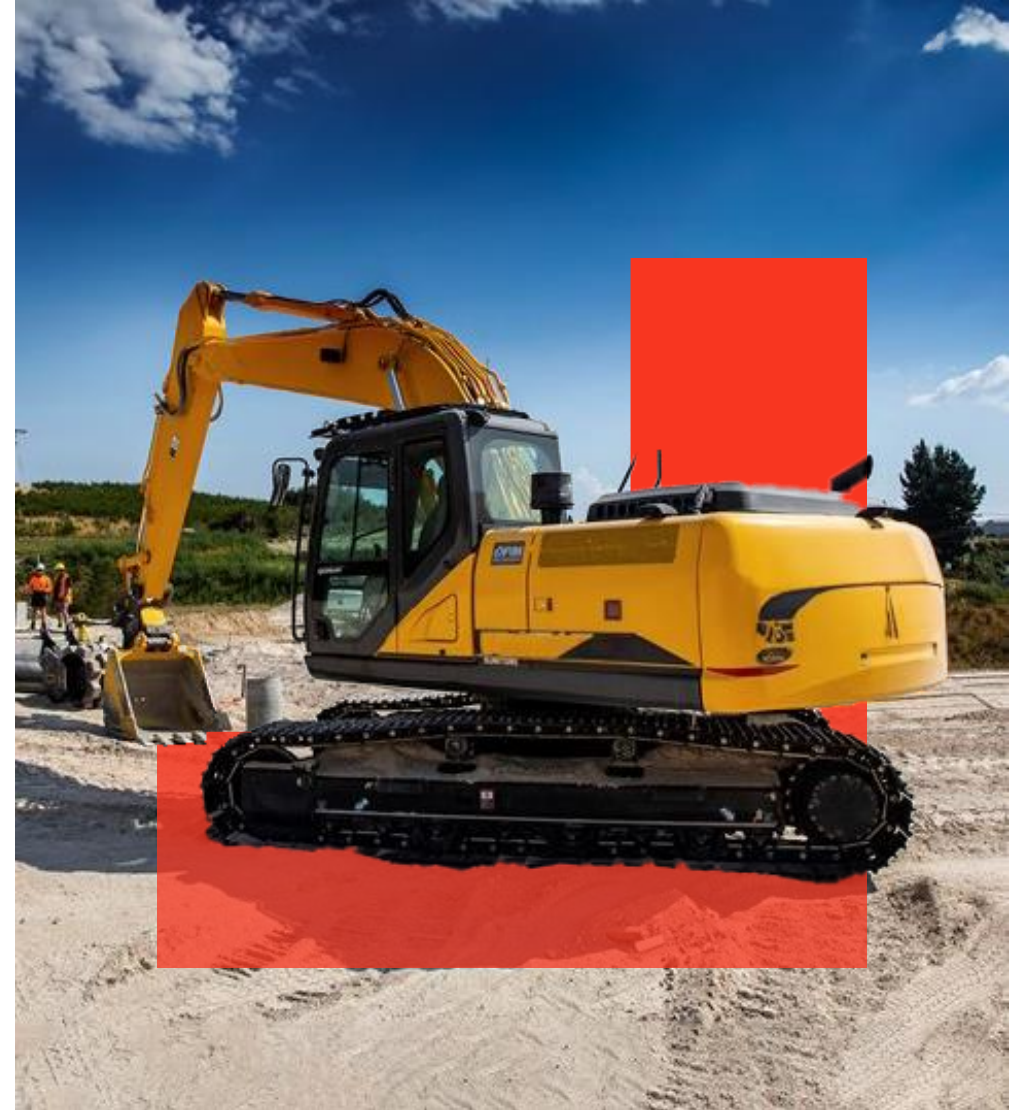
AB Equipment also **struggled with fragmented data across different systems, complicating reporting and operational insights.** They operated on customized versions of IFS with separate companies for each branch, resulting in **no single view of the customer or equipment** since data was spread across multiple systems.



This lack of a unified view led to **duplication issues and uncertainty about stock and inventory levels**. **Creating a parts order** also saw significant inefficiencies with multiple processes.

Streamlining internal operations, particularly core financials and business insights, was another key focus area. They required a solution that could extract data for reporting purposes without interference from existing system customizations, which had **hindered their reporting processes in the past**.

Achieving a full lifecycle view for the customer was essential for AB Equipment to improve their service delivery and operational efficiency.





# Attaining operational excellence with a comprehensive Microsoft-driven solution

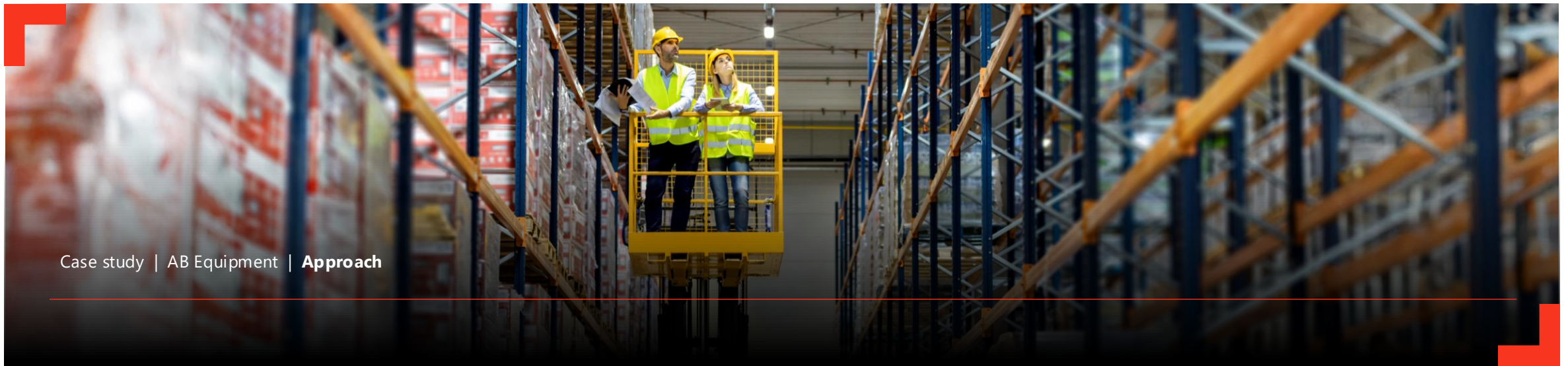
In a strategic move to overcome operational challenges, **AB Equipment partnered with Annata and adopted the A365 platform.**

AB Equipment sought a **software solution partner with expertise in the equipment industry** and a comprehensive, cloud-based solution.

Annata's A365, built on Microsoft Dynamics 365, emerged as the perfect fit. A365 is seamlessly **integrated with Microsoft Power Platform, Microsoft Azure, and the Dataverse**, providing the exact system landscape they envisioned. This integration ensured optimal workflow automation, flexibility, and scalability.

A365 **leverages Microsoft's integrated AI capabilities through Copilot**, empowering AB Equipment with the full potential of the Microsoft ecosystem. This provided the security and assurance needed to create a unified and cohesive solution for their business needs.

With A365, AB Equipment acquired a **robust platform featuring seamless integration capabilities**, providing a tailored and comprehensive solution. A365 also ensures their readiness for future needs by **offering the flexibility of add-ons** to expand functionalities as their business evolves.





## A strategic decision for **transformation with Annata**

They chose A365 to **modernize and optimize their operations across multiple fronts**, driven by its ability to automate field service and maintenance processes, integrate machine data for predictive maintenance, and provide robust financial management and business intelligence tools.

# Attributes that **led AB Equipment to choose A365**

- **A365's automated field service and maintenance capabilities** enabled more efficient equipment servicing by replacing manual processes. Its seamless integration capabilities and advanced fleet management features promised to streamline AB Equipment's workflows.
- **A365's Artificial Intelligence and Machine Learning capabilities** facilitated proactive equipment monitoring and maintenance, ensuring high-performance standards for the global brands they represent.
- **A365's machine data consolidation** significantly aided AB Equipment's predictive maintenance programs, empowering them to proactively monitor and maintain their equipment at peak performance levels. This was critical for upholding the high standards of the global brands they represent.
- **A365's integrated financial management and business intelligence tools** provided AB Equipment with a streamlined platform to simplify its internal processes, extract comprehensive reporting data, and gain valuable operational insights without being hindered by legacy system customizations.





# Achieving unified performance through **future-ready processes**

The implementation of A365 has transformed AB Equipment's operations across multiple dimensions through:

- ┌ **Advanced fleet management capabilities:** A365 offers smart and automated management tools purpose-built for equipment-intensive operations. It empowers AB Equipment to maximize asset productivity and uptime by streamlining field service workflows and leveraging machine data for predictive maintenance.
- ┌ **Operational intelligence through data integration:** A365 seamlessly unifies equipment data, core financials, and business metrics into a single integrated platform. This enables comprehensive visibility and data-driven decision-making across the enterprise.
- ┌ **Rapid adaptability to existing systems:** A365 demonstrates agility in adapting to companies' current technology landscapes, including legacy customizations, instead of forcing disruptive rip-and-replace implementations. This flexibility ensures a smoother digital transformation journey.
- ┌ **Industry-tailored ERP expertise:** A365 provides industry-specific ERP functionalities tailored to the nuanced requirements of sectors like industrial equipment manufacturing and service. This domain-focused approach drives faster time-to-value.
- ┌ **Unified experience across operational processes:** From streamlining equipment maintenance to optimizing financial processes and extracting actionable insights, A365 provides a unified experience across all core operational areas within a single cohesive platform.
- ┌ **Future-proof technology foundation:** Built on Microsoft technologies and a modern, scalable cloud architecture that is continuously updating, A365 ensures cutting-edge capabilities without disruptive version upgrades, providing a future-proof digital core.



## A vision of unified operations realized

With A365, **tasks that previously took 10-15 minutes, such as ordering parts and creating customer orders, are now completed in just one minute through a single platform.**

This significantly boosts efficiency while reducing costs. A365 has not only streamlined processes to maximize efficiencies but also **introduced features previously unattainable.**

One of A365's standout features is the **integration of telemetry for predictive maintenance.** This capability allows AB Equipment to **develop and implement scheduled maintenance plans,** a vital function that was previously manually reliant and not feasible with their old system.





## An empowered future with A365

By partnering with Annata, AB Equipment **went from siloed processes to unified performance.**

AB Equipment has equipped itself with the **cutting-edge digital tools necessary to drive operational excellence and maintain its market-leading position** in New Zealand's industrial equipment sector.

The full platform, with the option for add-ons, offers a **comprehensive solution tailored to their needs.**

AB Equipment now stands poised to leverage its enhanced operational efficiency, innovative features, and data-driven insights to **adapt to future challenges and opportunities**, ensuring sustained growth and exceptional customer satisfaction.

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AB Equipment's integration of Annata's IDMS exemplifies a commitment to leveraging cutting-edge technology to enhance operational efficiency and deliver superior service. This collaboration underscores our dedication to innovation and excellence in the industry.

Peter Dudson,

CEO, AB Equipment

