

CASE STUDY

A photograph of a male technician with a beard and safety glasses, wearing a dark long-sleeved shirt, working on an outdoor HVAC unit. He is looking into the open panel of the unit, which shows internal wiring and components. In the foreground, there are two pressure gauges, one red and one blue, mounted on a brass manifold. The background shows a clear blue sky with some clouds.

A Field Service Provider's Journey to the Cloud

INTRODUCTION

A national field services provider was challenged by a legacy on-premise platform which limited the ability to pursue strategic initiatives and operational improvements.

INDUSTRY

HVAC/R Maintenance

SERVICES

- Orchestrated migration from legacy on-premise platform to modern managed cloud environment
- Designed and developed a bespoke integration solution
- Deployed dedicated development and test stack

RESULTS

- Improved performance
- Reduced costs
- Ensured uninterrupted business continuity

» Achieving Peak Performance Through Cloud Transformation

A nationwide field services provider specializing in HVAC/R maintenance was struggling with the limitations of its legacy on-premise solution, a custom mobile app for field technicians, and Descartes Route Planner™. Despite significant investments in IT resources and hardware, the company continued to face persistent performance issues and rising infrastructure costs.

With a lean IT team and no dedicated test environment, the organization relied heavily on vendor partners and a small group of domain experts to maintain daily operations. As transaction volumes grew, it became clear that only a move to the cloud could provide the scalability and resilience needed for future growth.

A blue rectangular box containing a white quote. Above the quote is a small white icon of a folded piece of paper or a book. The quote is in a white, italicized serif font.

“JBF’s collaborative approach and technical rigor enabled us to modernize with confidence—without missing a beat in our day-to-day operations.”

With a lean IT team and no dedicated test environment, the organization relied heavily on vendor partners and a small group of domain experts to maintain daily operations. As transaction volumes grew, it became clear that only a move to the cloud could provide the scalability and resilience needed for future growth.

Maintaining the existing environment was restricting the company's ability to pursue strategic initiatives and operational improvements, resulting in missed growth opportunities and frequent disruptions to critical business processes. To address these challenges, JBF Consulting implemented a custom middleware integration solution while orchestrating a seamless migration from the legacy on-premise platform to a modern, managed cloud environment.

» Transformation Drivers

The client's leadership was committed to modernizing core systems to support future growth and innovation, while maintaining uninterrupted service delivery. The primary transformation drivers included:

Risk Mitigation: Ensuring that revenue-generating operations remained unaffected throughout the transition. This required meticulous planning and execution, with a strong focus on adopting best-in-class software development practices and robust infrastructure.

Modern, Secure Interfaces: The organization faced challenges with outdated and insecure protocols connecting enterprise systems. Internal resources were stretched thin, working to design and implement secure, modern integrations suitable for a managed cloud environment.

Legacy Infrastructure: Existing legacy systems hindered innovation and introduced significant security and availability risks. Migrating to the cloud became a mission-critical priority to address these vulnerabilities and enable greater agility.

These factors collectively underscored the urgency and strategic importance of the modernization initiative.

» How We Delivered Results

JBF Consulting recommended a two-phase strategy: first, design and build a robust integration layer and dedicated development and test environment; then, migrate to the cloud.

Integration: A lightweight middleware integration layer was designed and developed to process all mobile, ERP, and routing events. This solution validated data and delivered secure, authorized payloads through REST APIs, ensuring reliable system interoperability.

Environment Strategy: A dedicated development and test environment was created and rigorously validated. On cutover day, this environment was cloned to create the production environment, eliminating the risks associated with "coding changes in production".



“The transition to the cloud was flawless—our teams noticed the performance improvements immediately, and we finally have the flexibility to scale as we grow.”

Cloud Migration: JBF executed a carefully planned, multi-phase migration that included rigorous mock conversions. Following four successful dry runs, the routing platform was transitioned to the vendor's managed cloud over a single weekend—achieving a seamless cutover with no operational disruption.

» Results at-a-Glance

Business Continuity: Reliable performance and high availability for routing and scheduling have safeguarded revenue-driving operations and enabled scalable growth—without major new IT investments.

Seamless Cloud Transition: A flawless migration to a managed cloud platform delivered instant scalability, enhanced security, and significant long-term cost savings.

Risk Reduction: Transitioning from a single production environment to industry-standard non-production environments enabled comprehensive testing and regression checks, greatly reducing deployment risk and improving reliability.

Simplified Maintenance: Centralized monitoring and improved auditability streamlined support, reduced incidents, and accelerated troubleshooting.

Enhanced Performance, Security, and Cost Efficiency: Modern integrations and communication protocols minimized redundant message traffic, improved performance, and ensured real-time data orchestration.

METRIC	BEFORE	AFTER	Δ
Integration traffic (YoY, Spring weeks)	249 k / 214 k	105 k / 33 k	-60% to -85%
Duplicate mobile updates removed	n/a (not captured)	35-60k / day	65-75% of attempts
ERP peak CPU utilization	90-100%	60-70%	-20-30 pp
Monthly Order Upload times	8+ h	35 min	-92%

This table highlights key operational improvements achieved after migrating to the managed cloud environment. These metrics demonstrate the substantial gains in efficiency and performance achieved.

» A Client-Centric, Collaborative Approach

This project highlights JBF Consulting's expertise in orchestrating complex, high-stakes IT and supply chain software transformations. By uniting all stakeholders, we delivered a comprehensive plan and executed it collaboratively, achieving end-to-end transformation in just 15 months. Our disciplined, client-centric approach underscores our commitment to delivering results, even in the most demanding environments.



Contact JBF Consulting to discover how our team can help you modernize, mitigate risk, and drive sustainable growth.

Email us at contact@jbf-consulting.com
or visit us at jbf-consulting.com.