

## Footprint

Mid Atlantic: Maryland, Virginia, Delaware, Pennsylvania, and Washington D.C.

## Number of Techs

43

“

**“XOi has given us the tool to increase credibility and just overwhelm people with communication. We’ve had times where customers called in and challenged the work performed. Havtech has the ability to provide the customer with an electronic link to watch the associated video.”**

**ERIK HESS**  
Service Operations Leader

## Overview

Headquartered in Columbia, MD, Havtech is one of the mid-Atlantic’s largest and most experienced providers of commercial HVAC equipment, building automation systems, field services, distribution, and energy solutions. Havtech sought to leverage its position in the market and consistently exceed the highest level of service that consumers have come to expect.

With XOi, Havtech’s technicians are able to document every jobsite, capturing initial conditions, any recommendations as they arise, and an overview of what was done on site. The app provides photos and videos as visual evidence of their work, taking the guesswork out of what is really going on with facility equipment. As a result, clients can make informed decisions and feel confident in their investment.

As the XOi solution took off, Havtech discovered the workflow automation they were using could also improve many other aspects of the business, including sales, warranty, and supply chain. For example, Inside Sales Parts Representative Chuck Hicks likes the way technicians can simply snap a photo of an equipment nameplate, letting the technology handle the rest. XOi uses optical character recognition to automatically capture make, model, and serial numbers. “We can turn the warranty in with a lot less aggravation. It’s made my job much more efficient,” said Hicks.

## Partnering With XOi



Increase trust and transparency



Streamline communication from Havtech service technicians



Market differentiation – utilize the platform as a sales tool to differentiate Havtech from its competition



Improved workflow for new parts requisitions and quote generation



Increased complete documentation for warranty issues and damaged parts