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ENVISION HELPS KEEP BUSINESS FLOWING FOR BREEZI

Maker of Predictive Maintenance Systems for the HVAC Market uses Canvas Envision® to Reduce Installation Costs and Drive Customer Satisfaction

breezi

AT A GLANCE

- Maker of IoT-based predictive maintenance systems relies on 3rd party techs to install and repair
- Training videos didn't achieve desired result
- New program uses Canvas Envision for highly visual interactive training tutorials

Based in Research Triangle Park, North Carolina, Breezi is a maker of IoT-based predictive maintenance systems for the commercial and residential HVAC market. Its offering consists of a small wireless device called AirPulse and its BreeziPro cloud software which work together like a fitness tracker for HVAC equipment. The solution ensures that the right maintenance work is performed at just the right time. Deploying Breezi's technology enables facility managers and homeowners to provide clean, comfortable, healthy air for building occupants, a need that has dramatically increased since the global health pandemic.

The Challenge

To install its solution for new customers, Breezi relies on a network of HVAC technicians. While the installation process is simple by design, workforce attrition and a rise in retirements means that most technicians are encountering Breezi's products for the first time at installation. To address this challenge, Breezi needed a way to seamlessly incorporate installation training — and the ability to document that installation was performed correctly — into the technicians' workflow with as little disruption to their standard operating procedure as possible.

Initial Approaches

Early efforts included training sessions via Zoom, YouTube training videos, and PDF guides, but each method lacked the traceability and integration with systems of record that Breezi wanted to achieve. While in-app tutorials met many of Breezi's goals, placing them in the app made updating and expanding the instructions unnecessarily cumbersome. Any time changes were needed it required involvement from multiple teams, including product management, business analysis, design, software development, testing, and support, taking resources away from more value-oriented initiatives. Another vexing issue also arose, according to Breezi's CEO, Tim Seaton.



With any new solution like ours, it is imperative that technicians have machine-side access to reliable documentation, and Envision helps us provide this, exactly when and where our customers need it.” — Tim Seaton, CEO, Breezi

“Even though we did a good job of integrating the tutorials as part of the initial device installation and onboarding procedures, we didn't fully appreciate how frequently a new, untrained tech might encounter our already-installed device. The challenge then became how to elegantly place the tutorials within the new tech's workflow, which might involve only a single, one-step interaction with our app when they performed certain maintenance work, for example, clicking 'Changed Filter' after a filter change.”

Enter Envision

While in the process of experimenting with different approaches to meet its critical installation training objective, Breezi discovered Envision from Canvas®. The Envision platform delivers value across the manufacturing organization by connecting front-line workers — including assembly technicians, installation technicians, field service technicians, and others — to the latest design engineering and product information in a highly visual and interactive way that's ideally suited for today's diverse workforce.



Integrations with PLM, MES, FSM, and other systems ensure instructional content created and shared via Envision always contains the latest data and can be accessed and consumed through a variety of source-of-truth systems. Envision helps companies like Breezi reduce costs associated with employee onboarding and training, support the achievement of KPIs related to employee satisfaction and retention, and accelerate time-to-market.

“We first considered Envision primarily as a tool to augment our marketing efforts since communicating the design simplicity of our devices is key for our target markets and Envision has great tools for integrating 3D models with marketing collateral,” explained Seaton. “As we became more acquainted with Envision it was apparent that it could help us handle more complicated challenges as well. For our system to deliver on its intended value, we need to be sure our devices are properly installed and, if removed during subsequent maintenance activities, returned to service in a manner that ensures consistent results over the full lifecycle of the equipment. After speaking with the team at Canvas, we were convinced we could move these important training and documentation steps to Envision.”

After fully moving to the Envision platform, the Breezi team plans to have a set of digital assets (drawings of various types of filters, coils, motors, fans, enclosures, etc.) that they can combine with images of Breezi products to show virtually any arrangement a tech

might encounter. Since Envision is highly intuitive, anyone with knowledge of the HVAC components and how Breezi's system interacts with them will be able to assemble a visual tutorial for almost any type of HVAC system.

The Results

For Breezi, the use of the Envision platform will address the cost, flexibility, speed, and scalability of expanding its tutorials to address different HVAC types. For the techs, they will scan a QR code strategically placed on the equipment that reminds them that the unit is Breezi-equipped and provides machine-specific instructions on proper handling of Breezi equipment. Breezi will also use the Envision elements in other training contexts, including web, presentations, and videos. For customers, the new process will help ensure their Breezi devices work properly and deliver reliable machine condition data, all of which helps them understand the equipment behavior and improve OPEX by moving from time-based maintenance to predictive maintenance.

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"With any new solution like ours, it is imperative that technicians have machine-side access to reliable documentation, and Envision helps us provide this, exactly when and where our customers need it," concluded Seaton. "We also really appreciate that the Canvas team is on the ball with figuring out how to eliminate complexity, which can be a huge barrier to adoption of digital technologies like IoT."

For more information:

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About Canvas GFX

Canvas GFX creates powerful software solutions for manufacturing organizations that prioritize innovation. Our Connected Knowledge platform, Envision, supports Digital Transformation initiatives across the enterprise by connecting people to the knowledge they need to do their jobs to a higher standard. Canvas GFX is committed to helping companies leverage technology to enable the flow of knowledge along the entire digital thread to engage workers, reduce operating costs, and maximize revenue.

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