

GLOBAL SHOP SOLUTIONS CASE STUDY

The Cleveland Punch & Die Company

The Cleveland Punch & Die Company is a family-owned business headquartered in Ravenna, Ohio, that makes quality steel punches, dies, shear blades and tool holders for a variety of customers throughout the steel fabricating industry.



The Cleveland Punch & Die plant in Ravenna, Ohio.



The Cleveland Punch & Die team.

132 Years of Success

One hundred and thirty-two years is a long time to be in business. But the folks at Cleveland Punch & Die feel the best is yet to come. Although current ownership purchased the company in 1978, the same pride of craftsmanship and commitment to customer service exhibited by the original founders continues to drive the business today.

Cleveland Punch & Die has cultivated relationships with over 120 original equipment manufacturers, thousands of distributors and tens of thousands of end users for decades. The company's 50+ employees turn out thousands of different **make-to-stock** products, as well as offering sophisticated design and engineering services that have earned the company a reputation for producing top quality custom products and special application tooling with fast turn-around times.

With tens of thousands of parts in inventory, one of the biggest ongoing challenges for Cleveland Punch & Die has been keeping track of all the different tooling requirements for their customers. For years, management attempted to manage this process with an outdated AS400 system combined with various manual procedures. Eventually they found a much better solution through **Global Shop Solutions ERP software**. Ironically, they weren't even looking for an ERP system at the time.

"As a company, we're totally customer driven," explains Kyle Brown, Director of Business Development. "And with tens of thousands of customers in our database, we wanted to find a way to track customer data in a more efficient manner. We started looking at Global Shop Solutions because of its robust **customer relationship management** (CRM) application. But the more we looked at the software, the more we were impressed by other aspects of the system."

"The software is simple to use, and we liked the fact that we can easily get any information we need out of the system," says Brown. "What we really liked is how the system lets us use that information in ways that fit our business. With Global Shop Solutions, you can use any data you plug into the system in whatever manner you want."

Powerful CRM Application

With its huge inventory, extensive customer base, and mix of custom and make-to-stock parts, Cleveland Punch & Die has found the part number generator feature in the CRM application to be a real time saver.

According to Brown, customer service reps often generate hundreds of work orders in a single day. So the ability to assign different part numbers to customer-specific tools allows Cleveland Punch & Die to optimize the time and effort required to create new part profiles. When an order is received for a custom product, customer service reps simply pull from the huge list of part specs in the system and build customized part numbers and profiles.

The CRM application also makes it easy to track the growing number of special customer tooling requirements and machine capabilities. In order to assist customers properly, the customer service reps require a great deal of customer-specific information such as machine make and model, tooling requirements, and special tooling attachments. Because all this information is fully documented in Global Shop Solutions ERP software, team members have everything they need to know about the customer and the required tooling right at their fingertips.

How did the company navigate this vast river of information prior to Global Shop Solutions ERP software?

“Not very well,” Brown acknowledges. “We had the typical hand-written notes, word of mouth, and complicated paper trails. In many cases, specific knowledge about a customer’s requirements resided in a combination of computer files, outdated paper files and books, or even in a person’s head. So if a customer called in and only the head engineer had the required knowledge, we had to spend time tracking him down in order to extract the information.”

“With Global Shop Solutions, all customer data resides in the system so that everyone has access to the same knowledge,” says Brown. “We usually only have to talk to the customer once to get the information we need. Our goal is to know as much or more than the customer does about their own machines and tooling requirements.”

“Using Global Shop Solutions to share the data with everyone from the sales team to people out on the shop floor enables us to operate much more efficiently and better serve our customers,” continues Brown. “In today’s economy, everyone is short-handed, so it’s convenient when you can talk to someone who really cares and has the knowledge to help you on the first phone call. Global Shop Solutions has certainly enabled us to provide our customers with much greater service than our competitors.”

Data Visibility Spurs Shop Floor Enhancements

Customer service reps and engineers may spend most of their time in the CRM application. But on the shop floor it’s a different story, where the ever-popular [Supply & Demand](#) screen provides access to the data workers need to measure, monitor, and track jobs in progress.

From this screen, shop floor personnel can determine the status of jobs and work orders as they move from one workstation to the next. They can access data by part number, customer name, router, and any number of criteria. They can determine whether jobs will be completed on schedule and, if not, make adjustments to the production schedule or the shipping date. And they are able to drill down to any level of information they need regarding the part, part history and/or customer history.

Shop floor personnel also make extensive use of the [Shop Floor Data Collection stations](#) to cut costs and simplify operations. Instead of manually clocking in and out, workers simply scan their barcoded badges and work orders, and the Shop Floor Data Collection station automatically logs them onto the job. With numerous stations strategically located throughout the shop floor, machinists don’t have to waste time walking back and forth between jobs. And they can also access a wide variety of job specs and data through the screens, including manufacturing drawings for each and every item issued to the shop floor.

“As with CRM, visibility of the data is critical on the shop floor,” notes Brown. “With Global Shop Solutions we can see right down to the minute what employees are working on, where a part is in the shop, and whether it will be completed on schedule. This ability to accurately track parts through every step of the production process gives us a level of control we never had before. It also helps us make better decisions about how to manage workflow.”

“For example, lately we’ve been getting a lot of rush orders where customers call and say, ‘We need this part yesterday.’ Or, it’s a custom job that we usually quote a week on but the customer needs it in two days. With the [Advanced Planning & Scheduling \(APS\)](#) application, we can look at job schedules, machine capacity, and other shop floor data and instantly see the impact of moving those rush jobs to the top of the list.”

Putting “Dibs” on Inventory

Access to information through Global Shop Solutions ERP software has also paid dividends in two other areas vital to the company’s success: inventory and shipping.

With hundreds of jobs moving through the shop floor every day, maintaining sufficient inventory levels always presents a challenge. With Global Shop Solutions ERP software, workers will never again have to guess as to the availability of needed parts. And efficiency improves because shop floor personnel will not go to pull an item from inventory only to find that someone else has already acquired it for another job or customer.

“We are now able to check part availability with a few keystrokes,” says Brown. “Workers can see whether or not a stock work order or sales order is already demanding a particular part. And when someone enters an order for a part, the entire company knows that part is spoken for. This is especially useful for large, expensive items for which the company tries to minimize stock levels.”

“We’re the industry leader in stock inventory parts,” notes Brown. “The automatic work order generation feature, along with the ability to set minimums and maximums, has been such a big help in improving our ability to accurately track our stock inventory.”

Shipping has experienced similar dividends.

Before Global Shop Solutions, they had no sure way of knowing when a part would get shipped or whether it would get shipped on time. Now, as soon as a package gets scanned through the Global Shop Solutions and UPS systems, they instantly see a tracking number and can email this information directly to the customer. Anyone who needs to know when the part will ship can find out with just a few clicks of the mouse.

The company has also switched to e-invoicing customers who want to avoid paper—a move especially appreciated by credit card customers who want a copy of the invoice so they can monitor charges to their card.



A sampling of the company’s tooling parts.

“Our philosophy is to send information to customers before they think they need it,” says Brown. “With Global Shop Solutions, we can have the invoice sitting in their email inboxes before they even log on to their PCs in the morning.”

Cross-Training the Ultimate Benefit

Brown also points to the flexibility of the software as a real advantage.

He has started visiting the [Global Application Builder \(GAB\) Forum](#) to see how other companies are making custom enhancements that adapt the software to their specific needs.

“Global Shop Solutions works great out of the box,” says Brown. “But if we want to add something, it’s nice to know that we have the capability to make some changes in-house without having to hire an outside programmer. It’s also nice to know that, if necessary, [Global Shop Solutions will help us build it](#). And they’ll make sure that it works when we later upgrade to a new version of the software.”

For Cleveland Punch & Die, the ultimate benefit accrued from Global Shop Solutions ERP software may be the ability to cross-train people in many different areas.



The Cleveland Punch & Die office staff.

“In the past, we had a small group of people who had the knowledge to enter sales orders,” says Brown. “Now, our entire customer service staff can enter sales orders, generate work orders, and get them out into the manufacturing process. And that feeds directly into our customer-centric philosophy.”

“In today’s manufacturing environment, time is of the essence,” continues Brown. “Our goal is not just to make quality products, it’s also to get them out the door as quickly as possible. The more people we have cross-trained, the quicker we can get information to the shop floor, and the quicker we can manufacture our products and ship them to our customers. Using all the applications that Global Shop Solutions offers, combined with the ability to cross-train our staff, has given us a tremendous bang for our buck.”