



### At a Glance

Excel Manufacturing

### Industry

Manufacturer of parts, plating, processing and final grinding

### Employees

40 employees

### Headquarters

Valencia, California

### Solution

Epicor Vista

### Business Challenge

Improve inventory accuracy and just-in-time delivery from its vendors with a deadline to achieve 100 percent delivery performance

### Solution

An integrated enterprise solution to support the company's lean manufacturing efforts

### Business Benefits

- Ability to anticipate scheduling problems months in advance
- Improved traceability with instant access to the status of all parts
- Increased profits in spite of reduced sales following 9/11
- Decreased order processing time by 30 percent

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With its largest customer demanding delivery improvements, Excel Manufacturing realized it needed to fully implement Epicor Vista or risk the consequences. Excel is a full-service machine shop specializing in manufacturing parts, plating, processing and final grinding. "Our in-house grinding capability sets us apart from many competitors, giving us tighter control over quality and delivery," says Walt Halliday, chief executive officer of Excel.

Before the full implementation of Vista, however, Excel's delivery performance had been slipping. Their largest customer, the Parker Aerospace division of Parker Hannifin Corporation, recognized this slippage. Parker Hannifin is a Fortune 500 manufacturer of motion and control technologies.

### Close Partnership

"We have a very close partnership with Parker," explains Susan Halliday, president of Excel. "Our two companies share information and collaborate on lean manufacturing efforts." Parker holds at least two kaizen (continuous improvement) events at Excel each year. During a kaizen event, a Parker team closely examines a certain production process or work cell, helping Excel streamline that particular operation and improve the manufacturing flow.

"Companies once tried to hide trade secrets from their customers," comments Susan Halliday. "Lean manufacturing demands cooperation and sharing. Parker often sends their personnel through our plant to observe our solutions to manufacturing challenges and we visit their facilities to do the same." Excel also holds kaizen events for its own suppliers to help them operate more efficiently.

With the slowdown in the aerospace industry after 9/11, Parker needed to improve inventory accuracy and just-in-time delivery from its vendors. The company gave Excel a deadline to achieve 100 percent delivery performance.

Excel turned to 2W Technologies to assist them in meeting Parker's requirements. 2W Technologies is a value-added reseller of the Vista solution. As an Epicor partner, 2W Technologies works with manufacturers to fully leverage the benefits of their Epicor manufacturing solutions. The 2W Technologies team led the effort to help Excel fully implement Vista and achieve 100 percent delivery performance.

### On Schedule, On Budget

The process started in May 2002 and was completed four months later. Excel reached the goal ahead of schedule and has maintained 100 percent on-time delivery ever since, even on unique, made-to-order parts with highly critical dimensions. Dennis Morrow, Excel's Scheduling Manager, adds that Vista's flexibility in grouping different work centers and cells works well for lean manufacturing.

"We needed to provide Parker with information on our workload and scheduling — everything that affects delivery," explains Morrow. "Vista's Scheduling capability made this easy. It's a key feature not found in any other system." Excel has a large backlog of Parker orders, up to 10 years on some parts, so they can often plan production months ahead. Shop personnel once tried to keep this schedule information in their heads, which Morrow says did not work very well. "Vista enables us to anticipate scheduling problems months in advance, giving us time to find solutions."

At its national vendor conference, Parker recognized Excel's achievements and encouraged many other suppliers to choose Vista. "During two kaizen events on scheduling, some top experts from Parker reviewed our system and results," explains Walt Halliday. "These were people who had visited dozens of other companies our size. The Parker team had high praise for Vista, calling it 'the ideal software' for companies like Excel, providing the easiest operation and greatest return on investment."

### Tracing Progress

Susan Halliday claims Vista helped strengthen Excel's partnership with Parker in many ways. "Improved traceability was one of the biggest issues," she says. "There is no need to hunt through job tickets for information, which saves a lot of time."

Morrow agrees. "Our business revolves around traceability — it's a huge issue in the aerospace industry," he explains. "We must be able to trace everything 'three ways to Sunday,' including material certifications and customer-issued serial numbers."

Hand in hand with traceability, Morrow says improved visibility is a key benefit of Vista. "Having instant access to every part's status makes my job a lot easier — Vista is a great system."

Susan Halliday describes the biggest benefit of Vista as "saving shoe leather." She says, "I don't have to walk around the shop to find out anything — just a few mouse clicks shows me what I am looking for."

### Increasing Profits

All of the benefits from Vista are only possible because Excel invested the necessary time and resources to input data and set up the system properly.

"Our biggest hurdle was getting shop floor personnel to buy into Data Collection," recalls Morrow. "They finally realized that 'Big Brother' was watching them to help improve the data — not to find fault."

Vista reports now provide detailed breakdowns of every job, showing if Excel has over or underestimated costs. Problems or bottlenecks are pinpointed immediately so adjustments can be made.

Excel prints out a Time-Phased Material Requirements report daily, which details all materials needed for every job in the system. "The report helps us combine purchases and save money — once we saved \$1,000 by consolidating four different orders of stainless round steel," says Morrow. "That savings really impressed me."

Due in part to these savings, Excel has seen its profits increase since fully implementing Vista, even with reduced sales after 9/11. The Hallidays credit Vista for this result.

They also appreciate Vista's accounting functions. "The accounting system is great," says Walt Halliday. "Our company has grown considerably over the past four years, but we still have the same number of people in accounting." Also, order-processing time has decreased by 30 percent.

When evaluating software six years ago, Walt Halliday said Excel was wary of super complex software that was "big enough to run General Motors." He says Vista is the only software he has ever had up and running 100 percent. "We couldn't be happier," he said. "For a shop our size, Epicor Vista is the best system on the market."

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**Walt Halliday, chief executive officer  
Excel Manufacturing**

### About Epicor

Epicor is a leading provider of enterprise business software solutions to the midmarket and divisions of Global 1000 companies. Founded in 1984, Epicor serves over 20,000 customers in more than 140 countries, providing solutions in over 30 languages.



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