Onboarding with Pantonium

This is a **case study** of onboarding the Pantonium routing and dispatching system for a not-for-profit community transportation organization, occurring in the early half of the year. Sometimes the most interesting story is not about what you are doing, but how you got there.

"The **level of support** we received throughout the training was wonderful… It was great to be able to do the training at our site when it worked best for our busy schedule."

- Marilyn Bird, Lanark Transportation Executive Director

Lanark Transportation is a not-for-profit community-based transportation provider in Lanark County and the Town of Smiths Falls in south-eastern Ontario. Lanark Transportation Association (LTA) has been in operation since 2001, providing specialized transportation to medical appointments, education and training, day programs and other forms of on-demand people transportation in low density rural areas.

Lanark's clients include seniors, children and the disabled, transporting both ambulatory and wheelchair riders. The service model is similar to what rural transit, non-emergency medical transportation, paratransit or Councils on Aging provide. There are similar community-based transportation services for senior and disabled riders across North America.

Onboarding Overview

There was another case study about Lanark Transportation Association, done in 2014; it provides readers with a background and context of LTA. One of the open questions made by that case study was if Lanark might switch to a fixed route service in the future. Rather than shifting to fixed routes LTA decided to continue to provide on-demand service and acquired Pantonium's software in order to streamline office operations and improve efficiency on the road while maintaining the service level their riders had come to expect.

The general Pantonium onboarding process is highlighted below. Starting with preparation and learning – advancing to rollout and refinement. Pantonium is with our customers every step of the way.

LEARNING PHASE

Discovery Meeting
Understand the business

Prep & Training
Get management prepared

Training Core Team
Teaching basic concepts

Practical Training
Hands on & Trial Run period

ROLLOUT PHASE

System Setup
Review & setup system

Start Rollout
Start simple, manual dispatch

Process Refinement
Tailor the system

Automated Dispatch
Utilize pre-operation planning

Pantonium

Training & Support

Before Pantonium, Lanark used a community service order management system that did not perform routing or dispatching. Dispatchers built schedules manually all at once, sometimes as early as two weeks ahead of when the trips were actually to be performed and printed out schedules for drivers.

Training began in late January, with their Executive Director, Head Dispatcher, and Scheduler. Lanark decided to have all training done remotely, over the phone and online to remain flexible to their busy schedules. Starting with a discovery call for a fact finding interview to help tailor the onboarding for the specific needs of the client. At this time the Lanark team was given access to a training site, a sandbox for testing and learning the system, and also an online guide book and help center.

Once basic concepts were understood, the full production site was deployed, allowing dispatchers to perform trial runs, which began in February. Using the system to build runs for one to two vehicles a day and performing them in parallel with existing processes. The initial training was completed in the course of a month as dispatchers gradually increased the number of vehicles using the system.

"Some drivers were very enthusiastic because of the way it eliminated paperwork and they did not have to wait around for someone from the office to call them or text them about trips." **- Marilyn Bird Lanark Transportation Executive Director**

By March, half of Lanark's vehicles and drivers were performing trips with Pantonium. At this point the rollout was delayed by a government audit, as Lanark is a publicly funded organization, requiring the attention of the entire Lanark team. At the end of April **all trips and vehicles were managed in Pantonium**. Once a steady state was reached, the next step was tailoring Lanark's processes to maximize ease of use and efficiency. The support team helped dispatchers think strategically, letting the system worry about the minutia of schedules and routes, while still allowing control over exceptions and customer service issues.

By the middle of May, **the final stage** was moving Lanark's planning to a higher level of route optimization, called pre-operation planning. Once their operations were aligned with the Pantonium process, a greater level of control could be left to the system. With a day's batch of trips in the system, Lanark's dispatcher would run a pre-operation planning algorithm, optimizing them all at once. Using map data, fleet location and capacity, rider schedules and preferences, and numerous user defined customizations to ensure maximum efficiency. Lanark's Executive Director, spoke to their experience with pre-operation planning feature after using it consistently for three months:

"It is much more creative and flexible in matching and combining trips in a manner we could never come up with… **Something that would take us hours is now ready in minutes.**" — **Marilyn Bird Lanark Transportation Executive Director**

Dispatchers were still checking the plan to ensure accuracy and making minor changes for optimal customer service levels. Lanark is now using Pantonium's optimization feature to reduce the number of required vehicles and increase the number of transports each vehicle can perform per day,

> "It is **reducing our cost** while delivering the same level and volume of service." **– Marilyn Bird, Executive Director**

Lanark Transportation Association's deployment of Pantonium demonstrates a key factor in onboarding technology to existing operations. With nearly a six month deployment time, onboarding teams must match the schedules and capacities of the organization they seek to change and improve, while also integrating seamlessly throughout the process in order to not disrupt ongoing operations. Pantonium takes the long view when working with its diverse set of clients to ensure a smooth and successful transition. Lanark's Executive Director when asked about her plans for the future, is no longer interested in fixed routes, and instead is looking to grow.