

Workable Software options can eliminate redundant paperwork and ease your workload

Solutions

By Ann H. Carlson When Fred Ross took over Deckside Pool Service five years ago, the staggering amount of paperwork — and the hours required to manage it — took him by surprise.

As the Mission Viejo, Calif.-based company hired more repair technicians, the paperwork increased exponentially. Pretty soon, Ross and his wife spent every day, night and weekend just trying to keep up with the invoices, customer requests, estimates, work orders and every other scrap of paper generated during the course of a business day.

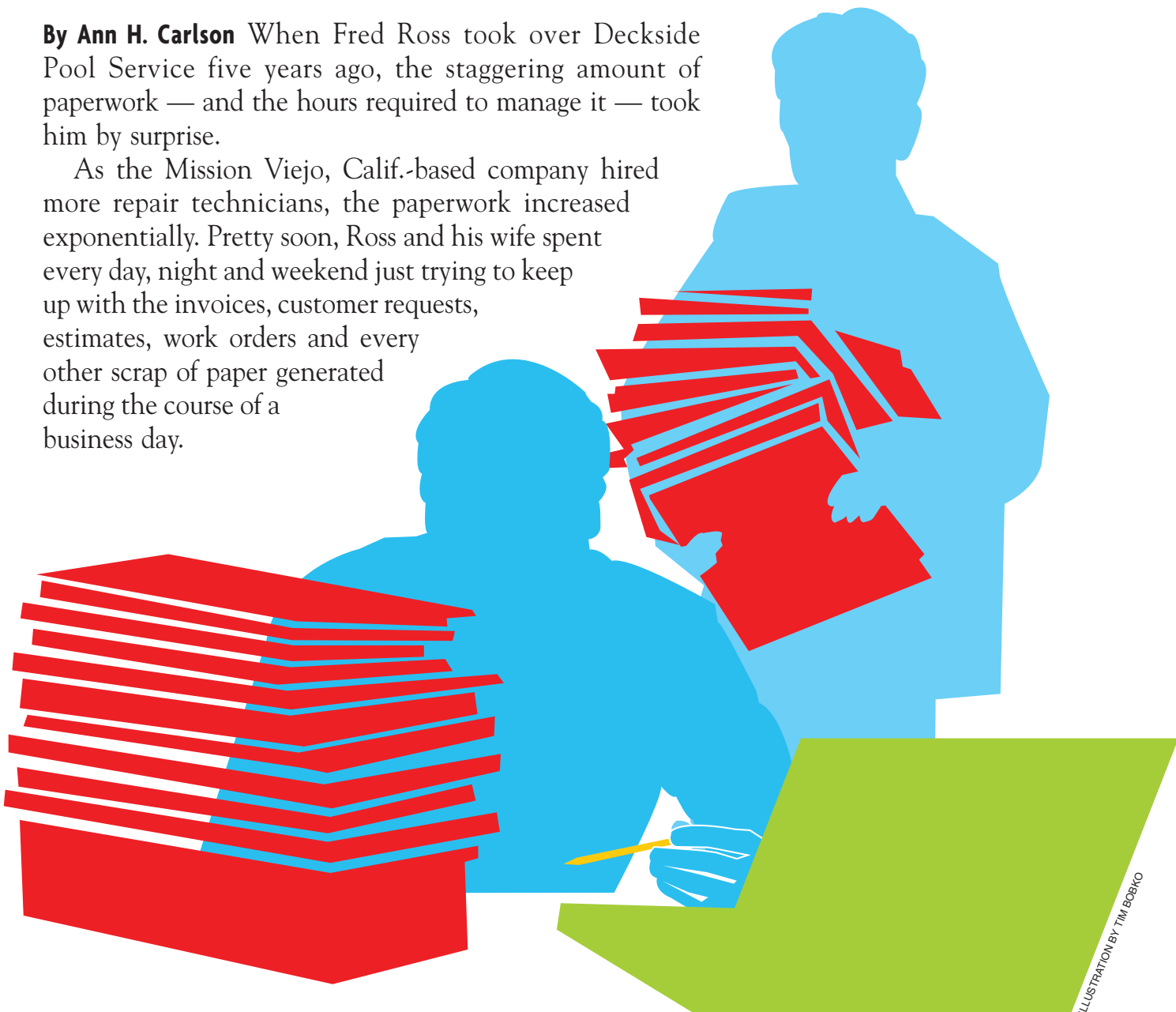


ILLUSTRATION BY TIM BOBKO

“We have as many as eight work orders per guy per day,” says Ross, who integrated management software applications to streamline the company’s processes. “It starts adding up fast.”

This situation is familiar to many pool and spa business owners who use traditional systems that are difficult to maintain. By changing over to high-tech tools, small companies can take control of their information flow, increase efficiency and improve their bottom lines. Here are some straightforward steps to choosing the right tech tools for your business.

1 Overcome your fears.

Many initially feel intimidated by the expense and learning curve of cutting-edge technologies. With the right training and support, these high-tech tools will give smaller enterprises a level of efficiency rivaling that of much larger firms.

“If a particular solution can give the impression that a small business is larger than it is perceived, that’s an intangible benefit that may pay huge dividends,” says Roger Bauer, CEO of SMB Consulting Inc., a small-business consulting firm based in Louisville, Ky.

2 Do the research.

In a fast-paced industry such as this one, it can be difficult to set aside time to do research. But staying informed about new products, even if you don’t intend to make a switch in the near future, can make a decision easier down the road.

“To create the time, I’d suggest business executives maintain frequent communication with industry experts and knowledgeable staff members on what is happening in technology,” Bauer says. “If you make a conscientious effort to stay informed, a decision about implementing a new technology or tool won’t be as daunting.”

When researching software to solve his company’s paper-flow problem, Ross first looked at products online, narrowed the field to six, and then requested online or in-house demonstrations from each firm. He chose MyServiceForce.com, a dispatch-tracking application that allows him to view the status of each job as well as manage all of the forms, such as invoices and estimates, associated with it.

“The start-up costs were low, and they weren’t trying to lock us into any one given field device,” Ross says. “Some of the companies want you to buy a \$3,000 handheld

device for every guy. Well, if you have four guys, that’s \$12,000 just in field devices.”

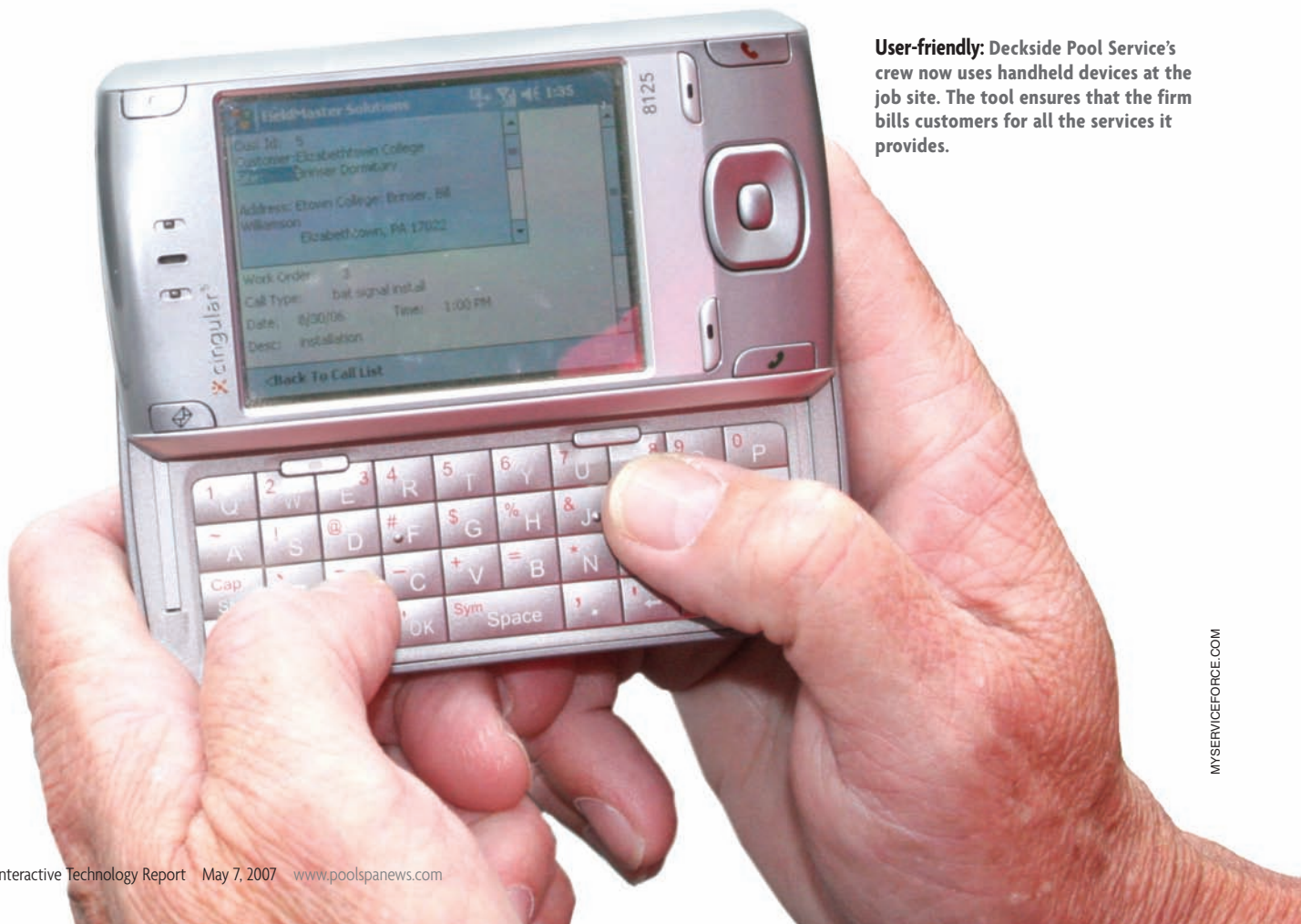
3 Assess your needs.

Look for products that are easy to use and serve a true business requirement, Bauer advises. “Just because something is ‘cool’ or might impress your friends doesn’t mean it’ll help accomplish key tasks any better.”

Consider the size of your company. Larger firms with their own servers and IT personnel often purchase software outright and maintain it in-house. For smaller businesses like his, Ross recommends getting a high-speed Internet connection and choosing a Web-based application. Users pay a monthly fee for this type of software, which is maintained and hosted by the provider, not the buyer.

Because there aren’t many software products aimed specifically at the pool and spa industry, early technology devotees now may find themselves using multiple databases that should be integrated.

To address this problem, Pools by Bradley in Sanford, Fla., purchased Sage Master Builder software, a system designed for construction builders that will combine the information in the company’s existing databases.



User-friendly: Decksider Pool Service’s crew now uses handheld devices at the job site. The tool ensures that the firm bills customers for all the services it provides.

“We had three different databases, and needed something to pull the information together in one spot,” says co-owner Megan Eaves, adding that the company eventually

probably a good move. “A cell phone is obviously a must in this world,” Bauer says. “Since e-mail is so widely accepted, a PDA, which allows real-time e-mail exchange, is

A perfect fit: Blue Marlin Pools could not find the right software system to handle its needs, so it designed its own. The new system stays on top of scheduling issues, project materials, accounts receivable and other vital concerns.

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would like to use the system to give customers access to their files on its Web site.

4 If you can't find it, create it.

If you're without an efficient way to combine multiple products, consider creating one yourself. For Mark Richter, the sales manager of Blue Marlin Pools in Melbourne, Fla., and vice president of Pool Pro Office decided to build his own, using a program called “File-Maker.”

Creating a customized software system is not for the faint of heart. “It's tough for pool builders to make a decision to try to do this on their own because, even after we started getting involved in it, it took a year of development before we saw anything,” Richter says.

The company hired a programmer, who listened to employees when building the design for what ultimately became “Pool Pro Office.” The result was tailor-made to fit with Blue Marlin Pool's work processes.

“We experimented with all of the different phases to see how we can expedite the paper trail as well as the production of our swimming pool company,” says Blue Marlin president Ann Nichol.

The feedback from Blue Marlin staff helped determine features such as the interactive job board, instantaneous access to accounts receivable, sales-lead tracking, and even a system to track all of the drawings and proposals for each job.

“Most important was ease of use and being able to navigate because everything I had seen had a lot of navigation, and it was very frustrating,” Richter says.

5 Put technology in your staff's hands.

Even if you don't have a management software system in place, investing in basic smartphones or personal digital assistants (PDAs) for yourself and key employees is

quickly becoming a necessity, regardless of the size of one's business.”

The combination of wireless handheld devices and having all vital company information available digitally gives workers unprecedented flexibility. Instead of coming into the office to collect their daily list of jobs, Decksider's repair technicians log on from home to see where they need to go. It also means that Ross can work from almost anywhere, which frees him to go on vacation with his family on occasion.

“I was sitting in a coffee shop in Maui running the business,” he says. “The flexibility it gives us to be able to stay in Hawaii and feel like we're on top of our business — how can you put a price on that?”

6 Determine its success.

To measure the success of high-tech tools, it helps to have a record of your business metrics before installation. “You can monitor your productivity numbers to determine potential effectiveness before and after a technology integration,” Bauer says. “Productivity isn't the only way to gauge success, but it's often a motivating factor for a technology project.”

Almost immediately after integrating software that improved the job invoicing process, Ross noticed a huge jump in repair revenues. Among other features, the new system allows his crew to submit itemized bills directly from the job site via smartphones, which means that fewer items fall through the cracks.

“We've figured the software paid for itself just from making sure that we actually

billed for everything we do that's billable,” Ross says. “We were just amazed. Repair revenues jumped 30 percent in the first month, and we didn't do anything differently.”

For Ross, the best benefits are impossible to measure — such as the ability to go to a child's soccer game in the middle of the day and still be aware of what's going on in the business.

“The single biggest improvement to our business has been quality of life,” he says. “We feel like we're not anchored to the office. I can be on top of the business even more than I was before, when I was tied to the office all day.” ■

