

# Crest Air Conditioning



## Crest Keeps Cool Control of the Business with Integrated Job Costing, Service Management and Finance Solution

Crest Air Conditioning Pty Ltd has been successfully supplying and installing air conditioning systems throughout Sydney since 1980. Founded on a strong customer service basis, Crest has grown from strength to strength and is now considered a leader in supplying, installing and servicing air conditioning systems to the domestic, commercial and industrial markets of the greater Sydney area.

### Keeping control of costs

Approximately 70 per cent of Crest's business involves outfitting new or refurbished buildings and developments. These are large, often complex contracts that typically involve design, supply and deployment of air conditioning equipment along with the provision of ongoing maintenance and service. To manage activity, understand performance against such contracts and to ensure project profitability, it is essential that Crest's management keep tight control over logistics and all costs incurred throughout the project life cycle.

Until a few years ago Crest managed its business with the assistance of a software package designed for the photocopier service industry. The software functionality supported three of the most critical areas of the company's business: job costing, service management and financial control. However by 2009, company growth was testing the software package's capabilities.

Crest Finance Director, Paul Collis explains: "The software we'd been using was suited to a fairly small environment and following several years of steady growth, we'd outgrown it. The range of information we wanted out of the system was increasing. Clients were also asking for more information for their own purposes including risk management, financial, forecasting and budgeting management. The system we had couldn't adequately address this need."



### At a glance

#### Business Objective

Having outgrown its current software system, Crest needed to find an alternative solution capable of supporting the company's expanding job costing, service management, finance and detailed reporting requirements.

#### Solution

- Microsoft Dynamics GP
- WennSoft Job Cost and Service Management modules

#### Business Benefits

- Management has accurate, hard data about activity rather than having to rely on "gut feelings"
- Monthly accounts are completed in a third of the time, while management reporting time has been halved
- The software has helped to introduce process efficiencies that are benefiting all areas of the business

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Having realised that a new solution would be necessary, Crest management was determined not to rush the decision. "We spent around 12 to 15 months looking at the market," Collis notes. "Our main requirement was for software that was easy to use because many of our users are not IT savvy. We needed to provide them with something that was user friendly and easy to navigate. We also wanted to continue with an integrated environment."

In November 2010, after looking at numerous alternatives, Crest selected a Microsoft Dynamics GP solution integrated with WennSoft Service Management and Job Cost modules. Collis says that one of the key reasons for choosing the solution was familiarity. "Everything we do – our communications, forms, spreadsheets – uses the Microsoft environment. Knowing that everything would easily integrate was important. Being Microsoft, we knew we would be well supported. On top of this, we'd received some very good references for GP from acquaintance companies," Collis says.

The decision to use WennSoft for additional project functionality came about following a meeting between Collis and WennSoft's US-based founder, Jim Wenninger who happened to be in town visiting a local industry event. Wenninger had designed the WennSoft software following

his own experiences in the US air conditioning market. "He knew the industry intimately, not just from an air conditioning perspective but also the service, construction and contracting side of it," Collis noted. "Every time we asked a question, Wenninger was able to answer it. This gave us a lot of comfort that we wouldn't come up with anything out of left field."

To deploy the software Crest looked for an implementation partner experienced in both Microsoft Dynamics GP and WennSoft. "We received indicative pricing from two organisations but felt that the Professional Advantage proposal was the most professional. Also, a couple of the companies that had recommended Microsoft Dynamics GP and WennSoft had also dealt with Professional Advantage. We believed they had the structure within their own business to provide the level of support that we expected."

## Fast, professional implementation

To kick-start implementation, Professional Advantage spent three days convening with Crest management and staff before creating a solution design document. Collis believes it was a particularly useful process. "We got to talk with the back room guys who were going to do the implementation rather than just the sales guys. By the end of the three days everyone knew what was expected; what was in and what was out of the project. We had a document that we could begin to work towards," he says.

Over the next three months Crest's internal project staff worked alongside a team from Professional Advantage, preparing data and building the new system. "From start to finish, it took three months but it was a very good three months," Collis adds. "Our business is project management and we were very happy with the way that Professional Advantage ran the deployment. Everyone knew where it was going, the time frames and how much money was going to be allocated."

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In mid-2011 the Microsoft Dynamics GP/WennSoft system was switched on. For one month the software ran in parallel with Crest's old financial system, giving the company time to check for bugs and conduct thorough financial testing before officially going live on 1 July.

## Positive staff response

Changing such core systems was a big step for Crest, especially given the varying IT skills amongst system users. However, out of 20 users and a total of 85 staff, Collis says that 99 per cent adapted quickly to the change. "We spent time with staff on a weekly basis during the lead-up to going live. We'd get them together, communicate where we were up to, what was happening and what testing had to be done. The Professional Advantage guys encouraged us to make sure this happened so that integration of the new software into people's daily work life would be fairly smooth. As a result it was probably a much better process than I've experienced when changing systems in the past."

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## More information than ever before

Collis believes that the biggest difference between the old and new software systems is the range of data available to the company. "I couldn't tell you the number of times we've come across things in GP that we could never obtain before. In the past we may have had a gut feel or an inkling that something was a certain way but now we have the hard data to back it up." He cites the example of productivity analyses for the company's 30-odd technicians. "It's important that we understand their productivity by comparing billable hours to the total hours that they could be billing. We could get this information under the old system but it was a very cumbersome process involving a lot of manual work and several hours

of effort. Now the information is available at the click of a button."

*"People have been shown how to work the software but someone may be on leave or unavailable so they approach Professional Advantage. The response of the support desk is always terrific."*

Reporting has potentially become much faster. Monthly accounts can be closed within two to three working days after month end, compared to the previous practice of eight or nine working days. Management reports that used to take two weeks to prepare are completed in half that time. "We don't have to worry about manual systems because everything is done within the software," Collis points out.

Another major benefit is much tighter, more accurate cost control. Crest management can instantly confirm committed costs regardless of whether the project is worth millions or hundreds of dollars. "From a cost control point of view, WennSoft is certainly much better," Collis says.

Efficiency has improved across the business. Tools such as WennSoft's labour cost allocation functionality and a Graphical Schedule Board are streamlining management tasks while enabling users to quickly identify upcoming service commitments, appointments and job status.

Clients are also feeling the positive effects of the change in technology. Many of Crest's service clients are strata or property managers, responsible for 30 or more buildings. These clients require quarterly summaries by building, itemising expenses such as repairs and maintenance. They also look to Crest for budgetary advice for the upcoming quarter. Collis describes it as a "troubling process" under the old software but notes "Now we can provide accurate information to clients fairly easily."

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Collis estimates that roughly every week staff come up with a new question about the system that requires a call or email to the Professional Advantage support desk. "People have been shown how to work the software but someone may be on leave or unavailable so they approach Professional Advantage. The response of the support desk is always terrific."

## The future

"We've now had three solid months of data go into the system and we are at the process of seeing what we can get out of it in a meaningful format," Collis notes. "There's still some work to be done on the reporting side to give us the information we need a little faster and more easily. But when we get this sorted, the next step will be to look at a customer portal. It's a reasonably common thing in our industry and it will allow customers to log in and access data regarding their properties. We see it as a way of improving customer service and at the same time, saving our staff time."

Collis is also interested in creating a project manager's portal that will provide project management and cost data to authorised internal users, regardless of their location. "We have a number of remote users who wish to get information out of the system on a regular basis," he explains.

"With Microsoft Dynamics GP and Wennsoft we've got a system that can grow with our business. It's not just an accounting package. There are some very good efficiencies that we can maintain through the integration of software across

the whole business. Before, people used to have to come back to me with questions when seeking data. Now even the guys at the coal face can get useful information from the system quickly."

Collis sums up, "Even though the project turned out to be larger and more intricate than we expected, the guys from Professional Advantage have been incredibly knowledgeable about the product. It's been very satisfying to work with them. Even if they don't know the answer to a question, they'll always sit down with us and figure it out. They know our culture and our systems, and they've been able to incorporate all of this into the system. It's a very good working relationship."

## About Professional Advantage

Professional Advantage focuses on providing technology and services that enable high-performance workplaces and organisations. Professional Advantage was established in 1989 and today employs more than 230 people in Sydney, Melbourne, Brisbane, Perth, London and Fargo, USA. The company is the largest provider of leading brand global business management systems, such as financial management, ERP, CRM, retail, business intelligence, business process management and portal solutions to midsize organisations in Australia, supporting over 800 clients nationally. Its multi-product offering is complemented by its development, systems integration, consulting, training, and support services. Professional Advantage is the winner of many business and vendor awards and is a member of the Microsoft President's Club 2011.

For more information

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