



Happen Business Case Study

Aldgate Pump Sales & Service



Aldgate Pump
Sales & Service

BUSINESS CLIMATE: ESTABLISHED INDUSTRY LEADER
CHANGE CATALYST: LACK OF VISIBILITY AND JOB TRACKING
SOLUTION: JIM2 BUSINESS ENGINE
JIM2 EDITION: MANAGED SERVICES EDITION, JIM2 MOBILE AND RETAIL

Aldgate Pump Sales and Service are the Adelaide and Adelaide Hills water treatment and filtration specialists. Opening its doors in 1982, their services now span the entire installation process including design, supply, installation and maintenance.

“We retail thousands of products whilst running two workshops and an infield service team. Separate retail, service and accounting software was becoming an administrative nightmare at the expense of productivity and old-fashioned customer service”, says James.

“Administration was increasing, with a large number of manual daily processes and spreadsheets to balance our day; our debtors were huge, our stock control was abysmal – especially stock between stores, quotes and other correspondence were late getting to customers and, worst of all, our communication to our clients suffered as the head didn’t know what the tail was doing.”

Details weren’t being captured in the workshop, it was difficult to see work in progress, impossible to tell when staff would be available for the next job, and there was no tracking of billable labour. Their service jobs were not profitable.

With limited integration between systems and a need for job management with workflow, James started looking for Australian service workflow solutions with local support. He found Jim2 and booked a live web demonstration to see what it offered, and to ask questions.

He could see service workflow was strong. It integrated accounting which would really cut those daily administration processes, they could measure actual vs billable labour, and they would have a much better grasp of their stock, specifically tracking stock for a specific job. He walked away with an understanding of the system and new hope.

“The features and benefits looked the perfect solution to our growing software problems. We deduced that, by switching to Jim2 we could save approximately 15 hours a week in administration. In reality, we have saved that and more.”

Now, James can see what’s happening across the whole company at any time on one screen.

Improved Cash Flow

Those time savings were now reallocated to improve communication between staff and customer with a new Service Work Controller (SWC), which enabled them to offer the customer service experience they had wanted. Using Jim2 to track job notes, stock used, stock to be ordered, job status and workflows that are visible to all staff, the SWC is able to keep their finger on the pulse of all work in progress, and communicate timely updates to customers. Staff are working more productively, and now understand each job and its progress without the need to speak to the in-field service team.

“Jim2’s intuitive processes have reduced our administration time whilst increasing productivity, growth and customer satisfaction. We are invoicing more work, faster and getting paid quicker, reducing debtors.”

JAMES WARD
DIRECTOR
ALD GATE PUMP SALES & SERVICE



Designed, Developed & Supported in Australia, Jim2® Business Engine is a complete business solution to manage every aspect of your workflow cycle and solves the growing pains of small to midsize enterprises.

CONTINUED OVERLEAF



"As a manager, being able to see what is happening across the entire company on one screen is tremendously valuable. Through use of status and workflows, each job can easily progress through in-field service staff, the workshop and supplier teams, ensuring information is current, and communication and productivity are maintained."

JAMES WARD
DIRECTOR
ALDGATE PUMP SALES & SERVICE

Key Benefits

- Reduced debtors by 30%
- Significantly less stock loss
- Increased productivity
- Better customer service and communication
- Reduced administration time

Their five in-field service staff are better connected no matter where they are, using Jim2 Mobile app.

"They have everything they need at their disposal. We can forward emergency jobs to the nearest team member with ease. As a result of the changes, we get fewer missed service calls, communication breakdowns and customer complaints," says James.

Since using Jim2, Aldgate Pumps have improved their cashflow.

"As our processes improved, so did our invoicing. Invoices are getting out same day, and payments are prompt."

Their postage bill reduced too.

"We finally had a working email function to send invoices. By being able to send invoices to multiple customer contacts, invoices get to the business owner and the accounts department where required. Our debtors have also reduced by 30% since running Jim2. We are invoicing faster, have become more productive, and have grown as a business," says James.

When it comes to stock control, they find huge time savings being able to auto-create purchase orders for a job. Stock procurement has also delivered time savings, and is very flexible – especially as they commit a lot of stock to jobs. Plus, retail end-of-day procedures have also "reduced to simply counting the cash! Having a live/integrated accounting program is brilliant".

"Our stocktake loss has historically been between 2 to 3% of stock in the past. This year, our main store was 0.34%! That's thousands of dollars – not only saved but sold for a profit."

A huge win for the team.

Successful Migration

"Having undertaken several implementations over the years, I was fearful of the task, but the Happen team filled me with confidence. In fact, it was their calmness and confidence that put me at ease. Nothing seemed difficult, and there was always a solution to any problem that surfaced.

"The extremely detailed and organised processes used during the implementation lead to a seamless transition, and nothing was missed. Happen were even able to solve an issue with my email server that my own IT company could not solve!

"For the switch to Jim2 (or Big Bang as I liked to call it), Happen were situated and ready to help in the background. That's great peace of mind for what could be a difficult and stressful time. Day one was a complete success! As we progressed, our team inevitably had extra support questions in order to fully utilise the features and benefits of Jim2. As always, the after sales support has been excellent.

Great Outcome

James has been very happy with what has been achieved by switching to Jim2 in August, 2018.

"Having the correct software package in your business is essential. We can now get on with what we do best – water pump sales and service. Jim2's intuitive processes have reduced our administration time whilst increasing productivity, growth and customer satisfaction. We are invoicing more work faster, and getting paid quicker. It's a simple, affordable solution that combines all of our requirements in one package."

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