

## Strategic software fit increases gross revenue by 78%!

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Hartman Business Technology (HBT) was asked by Lothorian Pools, LLC, a Maryland based pool construction and service company, to lead an effort to find a new business management software tool to manage its customer service division. Lothorian is one of the area's leading luxury pool construction and service companies, and sought to purchase a service management software system that, as they grew, would allow Lothorian to continue to provide the outstanding customer service its customers had grown to expect and appreciate.

### Case Background (Current State):

- Lothorian had previously purchased and implemented customer service software for its business, which unfortunately created more confusion and frustration than efficiency gains.
- Lothorian wanted to avoid building a custom software solution, but recognized that there were only a few viable software vendors in the pool service industry.
- Lothorian relied largely on manual processes for managing service schedules, documenting customer equipment and history, and developing routing schedules.
- Product inventory was manually maintained and not always accurately accounted for.

### Key Goals (Desired Future State):

- Lothorian wanted to grow their service division, but knew that their largely manual processes wouldn't support sustained growth.
- Senior Management wanted to improve the customer experience by purchasing one easy-to-use system for managing all of their key customer data, from customer demo-

graphics, to service history and from customer inventory to payment history.

- Lothorian wanted to automate service routing to improve the productivity and efficiency of each service team.

### HBT Solution:

- HBT led Lothorian in a series of business process improvement initiatives designed to standardize critical business processes and make it more likely that off-the-shelf software would match the way Lothorian does business.
- For many industries, commercial off-the-shelf (COTS) software choices can prove to be great solutions at cost savings of more than five times that of creating a custom solution. In addition, support and maintenance are often less expensive and less complicated.
- Once HBT had documented key requirements, HBT and Lothorian narrowed the list of qualified software products and lead a series of product demonstrations. With HBT's leadership, rather than demo their own 'bells and whistles,' the software vendors were asked to demonstrate HOW their software handled Lothorian's key business processes and requirements.
- Interestingly, with a few easy modifications, the winning vendor was not a pool software vendor, but a customer service software from the HVAC industry. HBT's knowledge of a wide range of industries and software genres allowed them to broaden their search beyond the limits of the pool industry, a critical component to

the success of this effort.

### Key Results:

- Since integrating the new software in 2006, Lothorian's gross service revenues have increased more than 78%.
- During that same period, Lothorian has added 7 new billable service employees, while adding only one back office/ administrative employee.
- Service Personnel now have an easy to access record of every service customer and transaction, greatly enhancing the quality and timeliness of their customer service efforts.
- Automated routing, scheduling and inventory have led to significant productivity increases by the service management team, who now spend more time with customers and less time with paperwork.
- Service teams now review a complete service history and onsite equipment inventory BEFORE going out on the call, which cuts down on return trips, and allows the service teams to complete each call more efficiently, creating both happier customers and more efficient operations.

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