CASE STUDY

Clients First
Business Solutions

Clients First successfully provides, supports and implements leading Enterprise Resource Planning solutions by putting clients and their business first. By helping organizations leverage the power of an ERP solution, clients are able to gain visibility and insight, optimize their operations and rely on dedicated support. With vertical expertise in Manufacturing, Maintenance, Repair & Overhaul and Distribution, Clients First has been the trusted advisor for many businesses looking to drive revenue growth and improve productivity with a partnerthey can rely on.

POWER STORAGE SOLUTIONS

Power Storage Solutions LLC
http://pwrstoragesolutions.com/

COMPANY INFO
Location: Dallas, Texas with additional offices in Houston, Detroit and Florida
Industry: Services, Electronics

OVERVIEW
When Derrick Elledge and his partners bought Interstate Battery's power storage division, they negotiated a 9-month window to continue operating on Interstate's financial systems. This left little time to choose and implement systems of their own. With help from Clients First Business Solutions, Power Storage Solutions LLC implemented Acumatica ERP in just 60 days, meeting the critical financial deadline.

KEY RESULTS
- Transformed operations, increasing profitability
- Increased efficiency with seamless software integration
- Reduced month-end close by more than 15 days
- Improved communication allowing Power Storage Solutions to make better, data-driven decisions
- Reduced project feedback loop from 8 weeks to one, improving scheduling, quoting, and gross profits
- Eliminated some $50,000 in waste a month from lost revenue, time, and information

Clients First Helps Power Storage Implement Acumatica Cloud ERP in 60 days

SITUATION
In 2017, Interstate Batteries made a decision to focus on its automotive division and spun off three divisions, including Interstate PowerCare. Derrick Elledge, and his partners, made the winning bid to

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buy PowerCare's Stationary Business with Terry Cummings, then Director of Services, and Steve Baker, then Director of Sales.

Elledge had founded the Interstate PowerCare division in 2004, helping grow the business to $60 million in sales. Now named Power Storage Solutions, the company provides engineering fulfilment, installation and maintenance of DC-power backup systems for Data Centers, Telecommunications Providers, Utilities and Petrochemical companies.

While at Interstate PowerCare, Elledge led the team that implemented Salesforce.com, Steelbrick CPQ, Concur and Workday with the belief that implementing best of breed software would make the startup efficient and data-rich.

"We had CRM with Salesforce, quoting managed through Salesforce CPQ, time managed through Workday, expenses managed through Concur, and inventory and service management through Davisware and it all sat on an Oracle E1 platform. We had six different operating systems we had to deal with at Interstate," Elledge says. "Then we had to try to have them all communicate together."
Instead of receiving the best-of-breed functionality they planned, they had tremendous problems connecting the software.

"It was ridiculous," Elledge says. "Trying to get the six different systems to communicate created more operating inefficiency. The timing of the data and the data consistency between systems created excessive trailing cost leading to surprises each month on our financials."

What Power Storage Solutions Didn't Want

"We obviously knew what we didn't want, and what we wanted," Elledge says. "We wanted an operating system that could handle all our business within one system. Frankly, we didn't think we could find it. This is where we set the bar: we wanted to make sure accounting ran well, and we had something that could handle all six current operating systems within the same platform."

Power Storage Solutions has offices in Dallas, Houston, Detroit and Florida. They employ 47 technicians, 10 sales and only five people in the back office.

Elledge compared NetSuite, QuickBooks, Sage and Microsoft Dynamics. NetSuite, he determined, was too expensive, and it seemed like a fit for a much bigger business. "NetSuite seemed a lot like Salesforce's solution and we knew that Salesforce was very behind on having a quote to cash system. It was also a very expensive model and cumbersome to work in."

QuickBooks and Dynamics didn't offer the functionality or affordability Power Storage needed. While exploring Sage options, Elledge learned about Acumatica ERP.

SOLUTION
Acumatica: All-in-one functionality in affordable, cloud-based ERP

"What really threw us over the top with Acumatica is that it offered a full quote-to-cash cycle and it overlaid on top of a solid accounting system, and Acumatica offered a service package, purchasing, inventory, client relationship management (CRM), quoting, manages projects and sales orders - all right there in operating system," Elledge says.

Acumatica is also affordable and web-based, allowing for access from anywhere, and it even offered Power Storage the ability to share data through a future customer portal. "Because of the way Acumatica is licensed it allowed all our employees to be on the same system under one license, we quickly realized Acumatica was the system we wanted to use to grow the company with no need to bold on anything else" he says.

"We were shocked to find all of these functions in one system."

Elledge previously worked with PeopleSoft and Oracle software, which "were very and costly to implement and you needed a whole lot of expertise," he adds. "Each package has bolt-ons, but they really don't seem to work well together. Their packages communicated, but they don't flow through the system the way we find Acumatica does."

Another reason they liked Acumatica was for its mobility. "One of the biggest complaints (about their previous software) was when traveling, the team we couldn't get behind the VPN," Elledge says. "With Acumatica, the mobility and cloud-based solution allows anyone to get on from anywhere."

Although Clients First helped sell Power Storage Solutions on Acumatica, the firm couldn't devote the resources Power Storage needed to meet its very aggressive four-month implementation schedule, and referred Elledge to another Acumatica partner, which didn't work out. An independent consultant didn't work out either.

As luck would have it, Clients First was able to shift some resources and began working with Power Storage Solutions. "In 60 days, we went from nothing in Acumatica to launching a $24 million company with 20,000 parts, 5,000 customers and having sales orders, projects, inventory, payables, receivables, and going live Dec. 1," Elledge says.

"It's astronomical when you look at what we did, and how Acumatica's cloud ERP system supported us."

Clients First Key to Fast Implementation

When Salesforce launched at Interstate, it took nine months, $1.5 million and 15 people to get running, according to Elledge. When Power Storage Solution's Controller switched his prior mid-sized company to NetSuite, it took six months, 20 people and some $500,000.

"We implemented Acumatica two people here, three consultants, and approximately $200,000," Elledge says. "That's a huge time and cost savings."

Elledge says he's not an IT guy, just a software power user, and credits Acumatica's flexibility along with the great support of Clients First, which took the time to understand how Power Storage Solutions runs, what its projects involve, and then configured Acumatica to make it all work.

"Clients First set up really nice import scenarios for our customers, customer contacts and products that made it simple to migrate the data," Elledge says. "Acumatica provides different ways of doing things so you can fine tune it to what you want it to do."

The time Clients First took to really understand how Power Storage Solutions works was pivotal in achieving implementation so quickly.

"If you can have good conversations about what your business does, how you want to account for sales and cost and what you don't need to account for – if you can get that right upfront – data migration is much easier," Elledge says. "Sure, we worked a lot of long hours, but we had a deadline and if we didn't make it, it would have been devastating."

BENEFITS

Strategic Decisions Pave Way for Fast Implementation

In order to launch Acumatica so quickly, Power Storage Solutions' team needed to focus on key system functionality first. They prioritized basic accounting functionality, sales order, inventory, projects and expense reporting in the initial launch. They elected to migrate CRM, Quoting and Service functionality in later phases after the core business migrated.

"Clients First had a good idea of what we needed to do and helped us set a path of getting there and helped us understand the accounting and structure of Acumatica," Elledge says. "We tried not to add customizations but set it up to do basic GAAP accounting. With Acumatica's flexibility, we were able to add subaccounts and attributes without going down the customization path."

Clients First was a big reason Power Storage Solutions was up and running in 60 days, he says. "We're now working with them to add time cards into the system, implementing CRM, sales order quoting, and then the service module will be added," Elledge says.

"Once we launched, it was amazing," he says. "During the first month we billed $1.7 million straight out of Acumatica, and closed the month in 45 days. In January, it only took 30 days to close, and February 15 days and March 5 days. We're still finding small things we need to fine tune around project accounting, the area of our business that's most complicated."

"Our top benefit was the cost and time getting up and running on the system," Elledge says. "Now that we're starting to build dashboards and people are communicating through the system, we're changing the way are running our business."

Reduced Project Review Period from Six Weeks to One

Previously, it took six to eight weeks after a project ended to determine the true cost of a project. That's because gathering information from six disconnected systems wasted a lot of time. Expenses through Concur came every two weeks. That information would then be matched with time from Workday, which flowed once every two weeks. There were lots of trailing costs due to these poor system integrations.

Now, when a job is done one week, the expenses and time are fully uploaded by Monday, so anything invoiced the previous week can be reviewed by a service manager. If the profitability or cost to budget is not correct, the sales team and service managers can instantly discuss how to adjust future projects. If the project tcomes in as estimated, the team can see immediately and congratulate everyone. there's not a problem. But if items are out of whack, the sales team and service managers can instantly discuss how to adjust future projects.

The team at Power Storage Solutions loves entering expenses into Acumatica. "It's the easiest system ever, and I hear that over and over how easy it is to assign expenses to project, take a photo of a receipt from a phone, and in two minutes have it logged into the system," Elledge says.

The company now has data instantly available so they can make dynamic, corrective actions in real-time, which has transformed operations and gross profits. If they've budgeted a project for 10 hours but learn someone logged 40 hours, or a project is scheduled for two days and it takes four, they can take immediate action – not wait for 8 weeks to get the information.

Field Services Will Improve Productivity

Power Storage's projects last anywhere from four hours to as long as 40 weeks, and the team uses Excel and Outlook to schedule technicians and projects. Power Storage plans to implement the Field Services module in Acumatica, which will allow them to better communicate with technicians and customers.

They will be able to send information such as who to contact on a site, what procedures they need to follow, what qualifications are needed to work on highly secure sites, what clearances they need and other project specifics.

Elledge looks forward to moving off Excel to Acumatica to streamline scheduling and communication and becoming more efficient. Invoicing sales and services separately and then being able to have each roll up into a project gives them one holistic view of a project.

Dashboards Provide Dynamic Detail Allowing Power Storage to Act Quickly

The ability to create dashboards with permissions lets Power Storage Solutions provide access to critical information on a need-to-know basis or throughout the whole company. Creating an accounts receivable dashboard helped the accounting team pinpoint top collection priorities, and, by providing access to the sales team, Power Storage reduced past due accounts, for example.

"We have a nice looking dashboard that shows what's past due now and who's out 60 or 90 days; it's color-coded, and we can drill down and see notes about the account. We can also see the top 10 overdue accounts and past due by salesperson, which has helped us collect more efficiently," Elledge says.

Clients First's Kristi Blas was instrumental in helping the Power Storage Solutions staff become proficient in Acumatica. "Kristi has been very tactical, helping us change dashboards or tweaking something to get certain information we want out of the system," says Elledge. "She's very good at understanding what we think we want and then offering a better solution that provides us even more than what we wanted. She's been fantastic."

She's also been very patient, walking staff through mistakes as they go through the processing cycle to help them learn how not to make the same mistakes and then bulletproofing the system, he adds. "It's really nice to pull in a systems level expert when you need one versus having one on staff."

Data-driven Approach Eliminates Waste

Implementing Acumatica allowed Power Storage Solutions to eliminate what Elledge estimates is some $40,000 to $50,000 in waste a month out of their systems from lost revenues to lost time trying to get the information they need out of so many different systems.

The entire Power Storage team is now on the same page, with access to real-time information which allows them to better communicate internally and with their customers, improving customer service.

For the first time, the company can make data-driven decisions with a high degree of confidence. "We can now see a clear picture of the business for the first time," Elledge says.

Clients First: A Partner for Life

Clients First takes a coaching approach to its clients, sharing information and teaching customers how to be self-sufficient, following the adage that if you give a man a fish, you feed him for a day. Teach a man to fish, and you feed him for a lifetime.

Elledge attests to Clients First's philosophy. "They spent a lot of time discussing Acumatica concepts and business concepts and why it was important to do things" with our IT staff, he says. "Rather than just troubleshooting our problems, they spent a lot of time training us on concepts and holding classes on dashboards to teach us how to build our own. This way we can develop our own solutions using the same base concepts."

This doesn't mean the relationship is going to end, he adds. "Your partner implementer is going to be lifelong partner; we're going to need Clients First for something forever," Elledge says. "I don't think you ever stop developing your platform."

"Who you pick will make or break your implementation," he continues. "They have got to know the program inside and out and have business sense, this is what you get with Clients First. We challenged them, pushing them to implement the latest Acumatica version and didn't charge me for learning on my dime and that was fantastic. We made them better and they made us better which makes for a really nice partnership."

Find out more by about how Clients First can help your business by emailing our team at info@cfbs-us.com or call 800.331.8382.

Acumatica
The Cloud ERP