

Smart Software

By Bryan Trilli

Is your office quick, efficient and paperless?

Software is supposed to make your life easier. It is supposed to ease, simplify and validate data input. It should also provide instant and complete access to that data.

My Software Already Does Everything I Need

In the water industry, every manager needs to have vital information at his or her fingertips in an instant. Managers should be able to answer the following questions at any given time. How many coolers, ROs or softeners did the company place last month? How many did it lose or discount and why? What is the company closing ratio? How many leads did the company get from the last home show that resulted in a sale? How many work orders did each technician complete last month? What outstanding customer issues have been open for more than a week, and who is responsible for resolving the issues? What is the most efficient route for the delivery drivers and service technicians? A single software package should provide answers to all of these questions.

What is Good Software?

Before you can head out on a delivery or service route, the information that puts together a driver's route or service technician's day must be input at a desktop. This is the first point in evaluating software. The cost and time savings associated with handhelds and mapping devices are amazing and should certainly be available in your choice software, but remember that every transaction starts in your office. Therefore, the user-friendliness and power of the software interface at your desktop is the primary concern.

Let's take a look at how software designed for the water industry should work by reviewing the following scenario.

When a prospect calls, you enter him or her into your software and create a computerized "lead sheet." The integrated mapping program gives your salesperson directions to the prospect's house. When your salesperson closes the sale, the program should instantly update your company, salesperson and lead source closing ratios. What this means is that a unit has been sold, and with a single click of the mouse the prospect becomes an active customer. You can then

use a document scanner to attach your new customer's rental or sale contract directly to his or her account on your computer—the same account that does the billing, service, deliveries and call management.

Next, the service person takes a picture of each item installed and attaches that to each piece of equipment on your new customer's account. These items are not attached to the same area as the customer's sale or rental contract. Remember, your paperless office is not a filing cabinet. It should organize scanned documents, not just attach them all to a single location on the customer's account like you would do with a folder in a filing cabinet. Finally, you schedule a follow-up filter change, salt or bottled water delivery, and maybe an introductory rental rate, and the software will alert you when to contact your customer next. Good software would be able to perform all of these functions.

Do not buy separate software to perform the tasks of billing, rentals, inventory, prospecting, document scanning, mapping, service and handheld deliveries. The best technology on the market already incorporates all of these tasks. I strongly advise that you always have a single customer/prospect list on your computer; otherwise, there is too much room for error and inconsistent information.

Software Benefits

How will water industry-specific workflow software with a paperless office help?

Here are five examples of how software can make your office efficient.

1. Manually filing paperwork in a cabinet and the time associated disappears;
2. No need to put the customer on hold to go grab your customer's file from the cabinet. When he or she calls with a question about the contract, you can simply pull it up on screen. If your customer has a question about his or her invoice, work order, or a letter he or she sent, it will be all organized on their account in the software;
3. If your customer needs to see a copy of a work order, simply fax or e-mail it to them directly from your computer. There is no need to print out a page

and walk to the fax machine;

4. No more filing cabinets. As of May 18, 2005, Bestbuy.com was selling a 120 GB hard drive (the equivalent of about three million scanned documents) for \$89.99. In comparison, a standard letter size, four-drawer filing cabinet costs \$119.99 on Officemax.com. Moreover, you will need about 300 of those filing cabinets to store the number of documents that one 120 GB hard drive can hold; and

5. A few clicks should produce graphs, charts and percentages to answer your most important questions. If this process is too complicated, you will either unnecessarily waste time, or avoid the tedious process altogether.

Office Efficiency

How much actual time will this save my office personnel? After talking to several U.S. and Canadian water dealers utilizing advanced workflow software with an integrated paperless office, here are a few estimates for time savings. Assuming you don't want to spend \$900 for a scanner that scans a page in 2.2 seconds it will take, at most, 25 seconds to scan a document. If you're moving fast, actually filing that work would take you about 50 seconds per document. So you can get twice the work done in the same amount of time. More importantly, when the customer calls in the future and has a question about a work order, you can almost instantly pull up the scanned document. Let's assume it takes you 15 seconds. Assuming the filing person did it properly, and you don't have 10 years of history, and the cabinet isn't on the other side of the office, and you don't have 37 customers named Smith to wade through, it would still take at least 90 seconds to retrieve a document. So if you have three new installs per week, eight work orders per day and you need to retrieve only three documents per day your total time savings would be just under 2.5 hours per month as illustrated in Figure 1. More importantly, a full 75 minutes of that time savings is when you have a customer on the phone inquiring about an issue. If you have a larger office requiring more frequent trips to a filing cabinet or

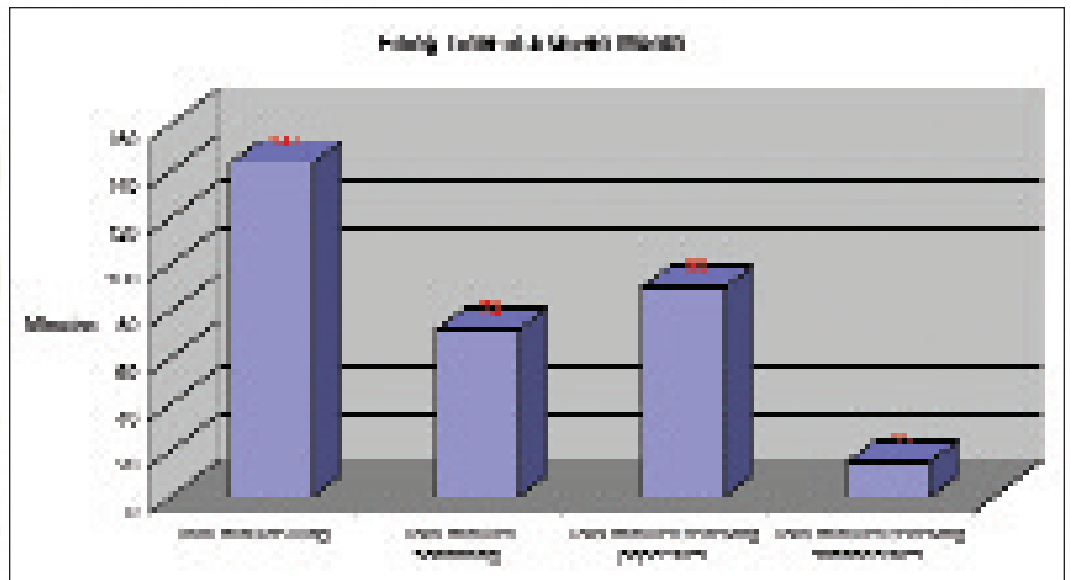


Figure 1: Filing time in a given month with a conventional filing cabinet versus a document management system fully integrated into your receivables software.

consider less conservative time estimates than proposed here, you will easily save 5–8 hours per month while increasing customer service, and saving money on conventional storage media.

To determine how your office might benefit, estimate how much time is spent filing and divide that by two. Then determine how much time is spent retrieving documents and divide that by six. This is the minimum time savings you should expect.

What would I actually scan into the computer? Anything you would place in a customer's file. For instance, you may scan work orders, sale contracts, rental contracts, invoices, pictures, sales proposals, customer letters, credit applications, faxes, e-mails, or even delivery tickets. Most people avoid scanning delivery tickets because they do not normally get filed in a customer's hard file.

However, if your business requires a copy of each delivery ticket, then your software should allow it as well.

You just expect me to throw the paper away? Yes. Eventually, you will want to throw it all away, even if you currently lack that burning desire. However, to ease your transition from landfill to recycling center, here are a few recommended steps you should employ.

1. For the first few months, you will want to both scan and file. Yes, this is double the work and will take extra time, but with a few months of verified backups and increased office familiarity you will rest easier at night;
2. For the next few months you will scan the documents and then throw the paper into boxes labeled as the month in which the work was done

(i.e. July 2005); and
 3. Get rid of the boxes and throw away the paper. At this point you may also want to hire a temporary employee to scan all of your old files and documents. Keep in mind it takes at least six times longer to retrieve a document from the filing cabinet than to pull up a scanned document on the computer, so this is time well spent. If you decide to scan everything in, splurge and buy that \$900 scanner. Trust me.

I never did like those filing cabinets. In any business, the best way to improve margins is to simply cut costs and increase efficiency. Utilizing a workflow management software program designed specifically for the water industry may be the best way for you to achieve both of these goals. Just don't forget to make sure it has an organized

paperless office feature as well. *wqp*

About the Author

Bryan Trilli is systems specialist for KDS Moses Inc., Adell, Wis. Trilli spends most of his time traveling throughout North America making water dealers' operations more efficient and cost-effective by utilizing Watertight workflow management software developed by KDS Moses, Inc. He can be reached at 800.676.6109, or by e-mail at btrilli@kdsmoses.com; kdsmoses.com.

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