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Multi-tasking software offers sane solutions for variety of companies

By Jacob Bunge

Unless you're a crooked CEO or Mr. Burns on TV's "The Simpsons," you probably don't "misplace" \$20,000. But as Professional Carpet Systems President Fritz Thompson can tell you, when you're trying to manually bill for an operation that does more than \$250,000 in sales annually, there's a lot there to keep track of.

"Our businesses have a tendency to be large for our industry—half a million in sales or larger—and we have so many customers that we need to have a software solution," said Thompson, whose company cleans and restores carpet and flooring. "We have had franchises that lost \$20,000 on an account because they were trying to track everything manually. Things fall through the cracks, so it's vital that we have a solid means of tracking jobs and moneys owed, especially if they're billed jobs, which many are."

Thompson needed a solution that would help PCS's 60 locations manage service appointments and finances. He first settled for a small start-up that offered the latest technology and a customized solution—until they went bankrupt about a year later and left many PCS franchisees locked out of their own systems. That's when Thompson went to his franchisees and asked for their help looking for a solution that could meet their needs. They decided to use ServiceCEO.

Created by Insight Direct, ServiceCEO is a "field service management solution," a program tailored to small and mid-sized service-oriented businesses that require

automated quoting and estimating capabilities, inventory management and integration with Microsoft Word and Quickbooks. ServiceCEO is the fifth and newest platform from Insight Direct, according to company COO Chris Chapman, and was designed with customer requests for inventory and invoice features in mind.

For PCS's franchisees, ServiceCEO offered a much more comprehensive package and assurances that the company was on solid footing. Thompson said that Insight Direct proved itself by following



through on customizations that PCS's previous solution provider never provided, and the support network was staffed with several fulltime programmers who dealt only with ServiceCEO and its users.

Ted Kennedy, CIO for the 100-unit Mr. Handyman franchise system, said ServiceCEO's ability to communicate with technicians' trucks gave his home repair and maintenance company flexibility it never had before.

"The integration with Microsoft MapPoint lets us see where appointments are on a map and where the trucks are, so we can dispatch techs much more quickly and effectively," he said. "We can electronically send a page to a tech with instructions for the next appointment and directions to the person's home."

The solution has also helped Kennedy and Thompson with scheduling—Mr. Handyman can now offer its customers the option of getting on a waiting list for quicker service.

At PCS, where the next day's service schedule can change as much as 20 to 30 percent overnight, ServiceCEO has allowed Thompson's operation to rearrange jobs and routes quickly and print out up-to-the-minute schedules.

"It kind of makes a crazy situation manageable," he said.

A solution with a lot of features also has a learning curve. Thompson said many franchisees were initially turned off by ServiceCEO's complexity, but he and other franchisees convinced them that investing time to learn the software would pay off. Now, he said, they're all on board.

Insight Direct charges for support, but based on Thompson's past experience with software companies, that's a plus.

"I want this software company to be making good money, so they have the resources to stay in business and grow the software," he said.

What about the fact that they sell to his competition? Not a problem, Thompson said.

"I'm glad they're selling it to my competition, because then I know the software is going to have more users and more income from our industry, so we're going to get a product better tuned to our business," he said. "The competition may have the same platform, but it's not the software that makes you successful, it's just a tool. It's how you use the tool that matters." FT