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20th Anniversary: 1988-2008 IPSSAN

Mission Statement: The Independent Pool & Spa Service Association, Inc. exists for the mutual professional benefit and growth of its members and for the continued improvement of the pool and spa service industry.

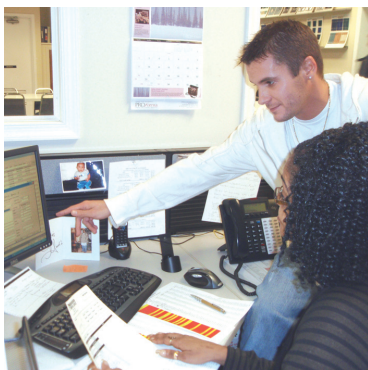


left to right: Frank Zamminer, Service Manager; Kylee Washington, Office Manager; Jerry Houseman, CEO; Chris Napolitano, Warehouse Manager and Repair Technician; Scott Houseman, Vice President and Co-Owner; Jesse Wells, Service Technician; Josh Hunt, Service Technician; Michael Figge, Commercial Division Manager; Chris Bertram, Service Technician

Turning service vans into warehouses on wheels

By Kay Fitzpatrick

How efficiently are your service vans deployed to various jobs, and



Michael Izzo, Vice President & Chief Operating Officer and Natalie Barrett, Customer Service Representative



Jeff Mercurio, Service Manager

exactly what quantity of parts and products is each carrying? Does your company even track the merchandise traveling around in the vans?

That's a challenge that drove Michael Izzo, vice president and chief operating officer of PM Swimming Pool Service in Roselle, NJ, to investigate software programs that would improve scheduling efficiency and inventory controls. Although the company had been monitoring inventory at the warehouse level, there was still a problem with loss. Once the parts left the warehouse, there was no accountability for installation and billing.

After reviewing several options, PM Swimming Pool Service went

with ServiceCEO, a software program from Insight Direct of Boston, to manage scheduling, inventory and other functions of the business. The program was developed



Lisa Bruno, Office Manager



Kylee Washington, Office Manager

specifically for field service businesses that must manage mobile workers who are deployed to customer sites.

"Previously, we could only track

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Service vans

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inventory at the company-wide, warehouse level. Now we know what is transferred from the warehouse to every vehicle," says Izzo. "The detailed inventory control has literally turned each van into a rolling warehouse, stocked with parts and merchandise. And all of it is tracked from the warehouse to final installation or sale. The software has reduced our loss drop rate by at least 15 percent."

Jerry Houseman, CEO & co-owner of Leisure Time Pool Service and Repair in Sacramento, CA, concurs. He also uses ServiceCEO and has realized similar improvements in inventory control. Houseman, who founded the company in 1995 with his son and vice president Scott, employs nine people and credits ServiceCEO for helping his company grow and increase its level of service. So much so that the company recently purchased another pool business called Fresh Water Pool Service and both companies are now managed together under the ServiceCEO solution.

"There are a lot of checks and balances in place between the warehouse and the vans," comments Houseman. "The tracking is seamless, and we've seen a significant reduction in write-offs. Used to be that technicians would forget to include small parts on the customer invoice, and that was lost revenue for us. Now those revenue leaks are plugged."

Both companies have experienced increased productivity and profitability by using field service management software. PM Swimming Pool Service accountants note that payroll and gas cost reductions have yielded a 10-12 percent improved efficiency rate. The program has helped capture previously unbilled work resulting from lost or miscalculated invoices, an amount more than \$30,000 per year.

"When I saw those numbers, I couldn't believe it. I wanted to shoot my service managers! Wish we had installed the software five years ago," says Izzo.

Reductions in paperwork also account for improved efficiency. With scheduling and work orders

tied directly into billing, redundancies in work-order generation and billing are eliminated. PM Swimming Pool Service is able to provide customized, detailed invoices to its customers, who appreciate how simple it is to read the bill and see exactly what they are being charged for any service or part.

Efficiency boosts growth

When paperwork is reduced, companies can spend more time on sales and marketing, building a bigger customer base.

"We are growing like crazy, at 100 percent annually," says Izzo. "We're working with multiple pool builders who give us 400-500 service referrals per year. We can better manage those leads and follow-up quotes along with customer expectations using the field service software. It's helpful in high season when our workforce grows from about 30 to over 50, and we have added scheduling and payroll tasks to juggle."

Before implementing the field service management program four years ago, Leisure Time Pool Service and Repair had real problems connecting scheduling and invoicing.

"We were using three different programs: Excel, QuickBooks and some other scheduling software," reports Houseman. "That required three separate entries of the same information. It was so cumbersome."

"I got fed up and tried different demos online to find the right solution for our pool company. ServiceCEO fit our needs because it is specifically for small-to-medium field service companies like mine. They provide online training with live reps who walk you through it and answer questions. What sold me is that it is simple to use. And believe me, I am the definition of the guy who doesn't want to fool around with computers. I just want to get the job done, and move on."

Scheduling technicians is now far more accurate and that is saving lots of money. The software ensures that the right tech goes to the right job.

"We have gained a reputation for arriving on time as scheduled, and getting the job done right the

first time. Customers expect that from us now," says Houseman.

For instance, if the job requires someone skilled in filter technology, then the appropriate technician is sent. This has eliminated duplicate calls to the same site to fix a problem.

"That alone easily saves \$40-50 a week just on gas. We can track exactly where the technicians are, what merchandise is on the road and installed, and the profitability of everything we sell and service."

What advice would Jerry offer to other business owners considering field services software to improve their business efficiency?

"First, just get over the hurdle of change. If you have employees, you need a field service management program. Basically, it's like have a supervisor in every truck, for only about \$45 per month. Good support and training are essential. As owner and CEO, I don't want to have to show new employees how to use the computer system. They can do that on their own online with the program we have."

Does Michael Izzo have any tips about using field services companies about software?

"Make sure your data processing people talk to the software company about what is required at their end for organizing data. And be sure the software company understands your workflow. I spent a day and a half in Boston walking through every step of our business, and found the vendor to be flexible in customizing the program for us. Look at the company's track record for customer support – you want a vendor who is quick to respond when your business requirements change."

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