

## Case Study: L. M. Wilson Heating & Air

### HVAC Company Generates \$20,000 in New Revenues

Prior to working with Insight Direct, L. M. Wilson Heating & Air hired a one-person software company that eventually went out of business—leaving President, Larry Wilson, stuck with an antiquated DOS-based software system and no technical support. After that, Wilson researched software solutions for two long years before committing to ServiceCEO. Now, ServiceCEO is helping Wilson's company save time and money every single day making a positive impact on his bottom line.

### COMPANY OVERVIEW

L. M. Wilson Heating & Air installs and services heating and air-conditioning equipment for commercial and residential customers and specializes in residential replacements.

**Size:** 7 employees

**Year Founded:** 1989

**Headquarters:** Burlington, NC

**Decision-Maker:** Larry Wilson, President

### L. M. WILSON'S CHALLENGES

- Outdated software (DOS-based) no longer met company's growing needs
- The software company Wilson hired was a one-person operation and did not have the expertise or capability to update software to a windows-based system.
- Wilson's technical support contract was discontinued when software company went out of business
- Software problems were hindering company's growth and productivity
- Labor-intensive to close financials each month

### L. M. WILSON'S SOLUTION

Wilson began a second extensive search for a reputable and reliable software product and company. His thorough research process lasted for two years, and he gathered information both via the Internet and through recommendations from professional associates at trade shows.

#### L. M. Wilson's Criteria for Software Company

- Solid financial ground and proven track record
- Talented team of tech-savvy experts (not a one-person start-up)
- Strong technical support and training
- Dedicated to future software investments, improvements and upgrades
- Follow-through on commitments

**L. M. Wilson's Criteria for Software Product**

- Robust software that supports and grows with company
- Flexible software that adapts to unique business needs
- Strong inventory management features and functionality
- Strong CRM features and functionality
- Able to integrate with QuickBooks and strong financial management features and functionality
- Reasonably priced with good value

**Final Decision**

ServiceCEO and Insight Direct met all of Wilson's criteria. He was particularly impressed with Insight Direct's solid support and training, such as the online training classes and product video demos. Wilson also believed that ServiceCEO was a good value and was not overpriced, compared to other software that he reviewed.

## OVERALL BUSINESS IMPACT

**L. M. Wilson's Benefits**

- Achieving higher revenues
- Increased office staff productivity (saves 5 hours per week)
- More efficient job scheduling and drive time optimization saves one hour per technician (2) per day which generates \$20,000 in new billable revenues per year
- Able to track inventory more accurately and efficiently
- Increased company organization
- Better management decisions with customizable reports
- Happier and more confident employees
- Enhanced professionalism

Case Study available at: <http://www.insightdirect.com/successstories/lmwilson.html>