

## Customer Case Study



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– Eve Harrell, IT systems administrator

When Harold Shumate started Shumate Mechanical in 1978, he had no way of knowing what the future would entail for his small HVAC company. That future turned out to be very bright: Shumate has since grown to employ almost 450 team members doing work to service and install heating and air conditioning systems for residential and commercial customers throughout Georgia and the southeast.

By 2005, after more than 25 years of steady expansion, the company had outgrown its existing accounting system. At that time, Shumate relied on a combination of DOS-based accounting software and spreadsheets. "Anything needed from a KPI standpoint was provided via spreadsheets.

All of our job cost information was maintained in spreadsheets," said Eve Harrell, Shumate's IT systems administrator.

For a company destined for even greater growth, it was clear that a new solution was needed.

### The Solution

Shumate turned to Signature from WannSoft. Built on Microsoft Dynamics GP, Signature is an end-to-end business management solution designed to meet the specific needs of companies in the field service and construction industries. Signature delivers accurate, real-time financial information, while helping companies connect sales and service, control project costs, manage labor and maintain customer equipment.

Shumate chose to implement both of Signature's two major modules, Job Cost and Service Management. Job Cost helps companies keep projects and jobs on time, on budget and on task, by allowing users to track and manage all phases of jobs from beginning to end. Service Management offers complete work order management to help specialty trade organizations deliver the right service the first time. Service Management enables users to create and manage work orders, contracts, quotes, invoices and more.

### The Benefits

Tracking costs by job is crucial in the specialty trades industries. When Shumate started using Job Cost, employees realized the enormous benefits the solution could provide.



“Being able to know where you are financially on a job, at any given time, was huge for us,” Harrell said. “Specifically, when we went into the economic downturn, we were able to make management decisions based on where our job costs stood. Backlog, profitability, workload and labor loading were all key points that once available to us helped us to navigate through this challenging season.”

The advantages Shumate has experienced since implementing Signature haven't been limited to Job Cost. By choosing an all-in-one system that provides access to a single source of accurate information for users across the company, Shumate has ensured that everyone's on the same page when it comes to work performed by the company. “The best improvement has just been the visibility of data from everyone's standpoint, from the CFO all the

way down to the technician in the field,” Harrell said.

Time savings is another area of improvement. Prior to the implementation of Signature, some processes required Shumate employees to double-enter every piece of data. Now, data entered by employees in one department automatically flows wherever it's needed. As a bonus, often that data is entered by the employees who depend on it the most.

“Now, we know that the data is accurate because it's coming from the technician; he has the most incentive to make sure that data is correct. He knows he's going to be looking at it a month from now, and that data will be there for him,” Harrell said.

Accuracy is an important ingredient for customer satisfaction, which is

something that has been a priority for Shumate from day one.

“We pride ourselves on customer service,” Harrell said. “Our owner, Harold Shumate, has always been very, very insistent on top, grade-A customer service. We try our best to encourage all of our employees to have that customer-centric mindset.”

That's something that Shumate has in common with WennSoft. Customer-focused companies recognize that in order to be the best, they've got to first invest in their own employees so that those employees are eager to serve their customers, Harrell said.

WennSoft has that same customer-centric mindset, Harrell said. “I believe that it's the best it's ever been,” she said. “I believe that everyone is excited about the product and where WennSoft is going.”

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## About WennSoft

With over 25 years of industry expertise, WennSoft is an innovator in the field service, construction and building intelligence markets. Originally developed by a commercial/industrial mechanical contractor, our Signature solution provides field service enablement, job costing and equipment rental solutions while our Building Optimization Broker (BOB) monitors facilities' health. Over 600 clients turn to WennSoft, not only for our industry expertise, but also for the knowledge extended by our professional services and customer-centric teams to simplify complex business problems. To learn more, visit [www.wennsoft.com](http://www.wennsoft.com).

**WennSoft**

Purpose Built Solutions for the Skilled Trades