HOW TO CHOOSE A SERVICE AND MAINTENANCE SOFTWARE

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ABOUT ASYMA

IMPROVING SYSTEMS, WORKFLOW AND INFORMATION.

Asyma Solutions LTD believes customers deserve systems that work. We believe in using technology and management best practices as effectively as possible to make your organization succeed. We help by providing innovative and sound proactive professional advice, products and services to enhance the financial well-being of your organization.

If your business is involved in contracting, job cost management, preventive maintenance, equipment servicing, office automation, telecommunications, or other types of services, this eBook will help you better understand your business and help you determine if the time has come to change your systems.

Follow our guide to decide what's right for making your business grow.

IS IT TIME FOR A CHANGE?

If you're losing business to your competition, you've waited too long to get a new system. Here are some questions you should ask yourself to determine if the time is right for change.

IS YOUR CUSTOMER SERVICE IN DECLINE?

When you start to offer more services and get busier, you not only have more jobs that need your attention, you also have more customers that need your attention. If your system is too old and can't handle the growth, this might cause you to lose orders, send jobs out late, mishandle agreements, and have overworked employees. A new system can increase automation, smoothing out your processes and getting your customer service back up to par.

DO YOU HAVE TROUBLE ACCESSING THE INFORMATION YOU NEED TO MAKE IMPORTANT DECISIONS?

Old systems often tell you what happened yesterday, and even if you can get this morning's information, or information from 10 minutes ago, that information is static. In the amount of time it takes you to find and read the information, things have likely changed. Incomplete – old – data can be dangerous if you act upon it. Switching to a system that offers real-time updates will make you more strategic and competitive.

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ARE YOU LOSING MONEY OR JOBS DUE TO INEFFIENCY?

If you are busier than ever but find your profit margins declining, you may be working inefficiently. Underutilized or double-booked staff, overstocking, delayed response times, or contract errors are just some of the inefficiencies you may experience. A new system will offer upgraded tools to make your staff more productive.

ARE YOU FAILING TO KEEP PACE WITH CURRENT INDUSTRY TRENDS?

The availability of new technologies, increased market demands, and clients with ever shorter attention spans are creating rapid change in many industries. If you are slow to adopt new technology or don't follow new trends, like joining social media platforms, your customer base – and your profits – will decline. A new system that offers customer relationship management will help you keep up with increased customer demands and ever higher expectations.

IS YOUR COMPETITION GETTING AHEAD OF YOU?

To stay competitive and profitable, you need to be using tools that are as good as – or, preferably, better – than, your competitors. An upgraded system can help you beat the competition by:

- Supporting and retaining higher-quality staff
- Improving your reputation in customer service
- Using the most up-to-date mobile and wireless technology
- Giving you the reputation of an industry leader
- Lowering costs and increasing efficiency

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Understanding What Service and Maintenance Software Is

If your company services equipment (either as a manufacturer or as a reseller) your day-to-day activities probably include the following:

- Providing product support, service, and maintenance for your customers
- Logging, managing, and tracking service jobs
- Scheduling jobs and tracking works-in-progress
- Maintaining inventory of parts, spares, and kits
- Managing staff and contract labor
- Processing warranty claims and returns authorizations
- Monitoring job budgets and profitability
- Accounting and financial reporting

Service and maintenance software makes all of this easy by saving you time and money. It allows you to automate processes, keeping labor costs low, and increases your earning opportunities by giving you more targeted information and strategic insight.

What to Look for in a System

1. CHOOSE A SOLUTION THAT INTEGRATES WITH YOUR ACCOUNTING DATABASE

Make sure a new system solidly integrates with your accounting database so that multiple departments can track jobs at all phases. Instead of manually entering information into your accounting system, integrated software automatically updates the system with information regarding job completion status, parts inventory, claims in process, and more. This reduces transcription errors, lowers staffing requirements for data entry, and gives you real-time information on all aspects of your operations.

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2. ASK ABOUT THE LATEST TECHNOLOGY

Any system you choose will need to work with the latest technologies. Determine which technologies are most important to your business and move forward from there. If, for example, you use barcode scanners, the new system should accommodate – and enhance – the use of that technology. The best systems will not only integrate with the current technology but will also be flexible and adapt to and integrate with future technologies.

3. ASK IF EXTRA USERS AND MODULES COST MORE

New systems aren't cheap – in addition to the purchase price, there will also be installation, maintenance, upgrade, and support fees. Some software systems come with a specified number of users and adding more costs money; some software systems include fewer capabilities in their baseline software and offer "extras" for extra money. Know how many users you have and which modules you'll need, and make sure there are no hidden costs.

4. MAKE SURE THERE ARE OPTIONS FOR GROWTH

Good software developers will work to improve their product, developing new features and enhancing old features regularly. Before you purchase your new system, find out if there are frequent updates – and how much those updates will cost. Updates cost far less than purchasing a new system, so find a system that can grow with you.

5. INQUIRE ABOUT SYSTEM CAPACITY

How many employees will be using the new system simultaneously? Can the system accommodate that? If you hire more employees, get more customers, or add new locations, can the system accommodate those things? Systems have limitations, so knowing where you are now and having an idea of where you'd like to be will lead you to the best solution for your needs.

6. ASK ABOUT SYSTEM ARCHITECTURE

A strong, stable architecture will integrate with your current systems, like accounting, and will be both customizable and scalable. A strong architecture will expertly handle old technology – the internet, faxes, PDAs, emails, etc. – as well as new technology – smart phones/tablets/other mobile devices, Wi-Fi hotspots, "the cloud," etc. Also, take the time to find a system whose architecture is either written into your financial core modules or has a direct long-standing relationship with your financial modules

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7. LOOK FOR POWERFUL REPORTING

A good system can get you the information you need with minimal effort. In addition to getting the information for you, a good system will also automate the retrieval and distribution of the information. Also, look for a system that can customize reports, as such a system will offer virtually unlimited reporting capabilities.

8. EVALUATE SYSTEM SECURITY

You need to protect sensitive functions and information for several reasons, including legal ones. A system that has good security lets you specify which functions/information users can perform/see at which times. Another good security function is being able to modify the system so that your staff members see only the information that is relevant to their job functions.

9. UNDERSTAND THE DIFFERENCE BETWEEN STANDARD FUNCTIONS AND "EXTRAS"

Similar to our aforementioned modules section, each software brand offers a different set of functions that come "standard" with a system. If you need more than those basic functions, software companies will charge for "extras." Purchasing extras can get expensive, so pay very close attention to which functions are considered core functions and which functions will require additional fees.

10. ASK ABOUT TECHNICAL SUPPORT

Even if you have an excellent information technology staff, it is likely that questions and troubleshooting issues that can't be handled internally will arise. What are the policies for the system's technical support? First, ask if there's a free trial or a specified length of time you can get support for free. Then ask about the cost, the times that tech support specialists are available, and what you can expect response times to be.

11. CONSIDER IMPLEMENTATION TIME

Look for a system that can be up and running quickly (3 months on average for project completion). The less customization your system needs, the faster the implementation process can be completed.

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10 IMPORTANT FEATURES TO LOOK FOR IN A SERVICE AND MAINTENANCE SYSTEM:

1. Complete back-office integration with General Ledger, Accounts Payable, Accounts Receivable, Inventory Control, and Purchase Order modules
2. Scalability to accommodate growth
3. Job management tools, such as the ability to estimate jobs and compare estimates to actuals
4. Integration with the internet and mobile technology
5. Real time updates to and from the back-office accounting system – not batch updating
6. Browser based graphic interface that's easy to learn and use
7. E-commerce capability
8. Advanced reporting capability
9. Support for global business, including accommodation for multiple currencies
10. Minimal implementation time (average of 3 months)

Getting Started

BUILD THE CASE FOR A NEW SYSTEM

Before you can research products and choose a solution, you will need to take an important – but sometimes overlooked – step: building a business case for your new investment. Although you may feel that you are making the right move, it may not be so obvious to other decision makers in your company.

Start by measuring your current productivity levels and calculate the cost of not making any change at all. It's important to have a "benchmark," especially when you start to think about budgets and return on investment. Gather metrics such as predictive error rate, man-hours spent on redundant processes, the cost of stocking unused spare parts, and the cost of losing a percentage of your customer base due to poor customer service. Make sure to define your goals and objectives and gather some ballpark numbers so you can communicate to decision makers the costs, benefits, and potential ROI of changing to a new system.

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BUILD THE CASE FOR A NEW SYSTEM (CONT.)

The process of building your case will help you define where the problems and opportunities are so that you can be sure that your solution will address them.

FORM A PROJECT TEAM

Put together a team of people to decide what your company needs from the new system and what functions it must perform. Depending on the size of your company, team members may include the system users, managers/supervisors, your IT department, and those responsible for sign-off. Define each person's role and responsibilities, level of involvement, and decision-making power during this process. You may need to change work priorities during the selection and implementation phases to make sure your project team can get the job done.

EVALUATE YOUR CURRENT SYSTEM

To get the most out of your new service and maintenance software, you must do more than simply add technology to your current processes. What problems are you currently having that you want the new system to fix? What things do you think work but would work better with a little tweaking? What works and doesn't need changing? Consider how technology can automate current processes, but also examine ways to improve them other than automation. Encourage your team members to be candid about what they find frustrating, repetitive, or ineffective. Examine how your business interacts with customers, suppliers, and your business's departments; look for weaknesses and ways to improve your communications.

SHARE YOUR EXPECATIONS

Once you've agreed upon the process of evaluating software and drafted a timeline, have your team members share their expectations for the new system. Have a session to discuss ways to improve the existing system, making sure to include new functions and processes that aren't currently in place.

AGREE ON YOUR NEEDS

Have team members create a list of key functions they'd like the new system to have. To help them prioritize, have them label each function as "essential," "greatly desired," or "would be nice." Get a consensus within the team by defining the rank of each function and then combining those items into a prioritized list.

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BUILD THE CASE FOR A NEW SYSTEM (CONT.)

Once you have a consensus, create a formal "required functions list." This list should be short, one or two pages, and should be used during the system evaluation to help you quickly eliminate systems that don't meet your needs.

CONSIDER THE BENEFITS OF BACK OFFICE INTEGRATION

Selecting a service and management software system that integrates with your accounting system gives you complete control over the flow of information between your back office and the service department. When integrated, data transfers from your service department to your accounting database happen automatically, eliminating manual entry and transcription errors while giving you up-to-date job profit and inventory information. Look for smooth-running software that reliably interfaces with your financial data and supplies in-depth information across the enterprise.

DON'T FORGET HARD-TO-QUANTIFY BENEFITS

The right system maximizes your staff's productivity by freeing them from time-consuming tasks and allowing them to focus their energy on providing better customer service. With more immediate access to tools and information, your customer service will have more value – giving your business an edge on the competition.

FIND A RESELLER

KNOW THE BENEFITS OF WORKING WITH A RESELLER

Before you begin narrowing down your list of potential service and maintenance solutions, it's important to understand the benefits of working with a reseller. A good reseller is knowledgeable about service and maintenance operations and has experience with integrating software for businesses in your industry. A reseller will help you select the right software, install new networks or hardware, and make sure the system is implemented by your target date. Ideally, your reseller will also be familiar with your accounting system and can make sure it integrates seamlessly into your new system.

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A good reseller will:

- Evaluate and suggest the best service and maintenance software for your business.
- Help you put improved processes in place.
- Save your company time and money during system install and subsequent training.
- Help you get the most out of your implementation based on your business's specific requirements.

AVOID REQUEST FOR PROPOSALS (RPNs)

Contrary to what your colleagues may tell you, don't send out a Request for Proposal (RFP) to the resellers you are considering. Creating an RFP, sending it out, waiting for proposals, and reviewing them can take months. You can achieve the same results in days by asking potential resellers if their system provides the key functions you require. Obviously, if your company requires you to use an RFP, this step is necessary.

Often times there are resellers that provide reviews of systems and procedures that will provide unbiased solution recommendations. Research if there are any in your area.

SCREEN POTENTIAL SOLUTIONS

Email a copy of your required functions list to the resellers you are considering so they have time to prepare a relevant presentation. Conduct phone interviews to see how well their solution matches your required functionality. Check to see if each feature comes standard with the system, is available as an add-on module for an additional fee, or is not available at all.

A good reseller will ask you many questions to determine which solution is the best fit for your company.

WHEN EVALUATING A RESELLER, ASK YOURSELF THESE QUESTIONS:

1. Can the reseller provide me with a complete service package?
 The most important elements of any software implementation are product training, technical support, future maintenance, and upgrades. Look for a company that wants to assist you not only with the immediate sale and installation but also with long-term training and service.

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WHEN EVALUATING A RESELLER, ASK YOURSELF THESE QUESTIONS (CONT.):

2. Does the reseller listen effectively?

This question separates the true solution provider from the product peddler. To make the best recommendations for your business, they must first learn about your business. This includes asking questions about your system's current capabilities and about the things you want changed. A good reseller will work to learn as much as possible about your business and will speak to more than one person within your company.

3. Does the reseller communicate effectively?

Be wary of resellers who spend all their time discussing the features of their program. Your focus during discussions should not be entirely on features; you should also include the system training and other services the reseller can offer.

4. Can I work with the reseller?

Remember, you'll be working closely with the reseller over a period of days, weeks – maybe even months. For this reason, the reseller you choose should fit into your company's philosophy and should make you feel confident in their expertise. It's also important to find someone whose company you enjoy.

Here is where Asyma Solutions comes in. We work with you to identify the costs associated with making no changes, the savings associated with improvements, and the future gains that will be realized when you choose us as a reseller.

If you need help choosing a Service and Maintenance Software, please contact us at (403) 328- 8188 or go to our website www.asyma.com

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