



CASE STUDY

Automated Workflow Solution and Infrastructure Upgrade

Innovative, cost-effective use of technology “built-ins” positions automatic garage door vendor for growth

Background

Neptune Door is an established small business that sells, installs, and maintains automatic garage doors to customers in Central New Jersey. The present owner is a long-time employee who purchased the business when the founder of the company retired. His strategy is to double Neptune Door’s sales over the next two years. When he engaged Trinity Worldwide Technologies, he had already implemented a reorganization of the company. He was then ready to introduce efficiencies and IT infrastructure upgrades to support his planned growth.

Business Drivers and Issues

Neptune’s management had a Microsoft (MS) Access application that served primarily as a customer contact database. It collected and stored information that was duplicated in paper files elsewhere and was only a small part of a fairly complex workflow that involved phone orders, scheduling on site visits to take measurements, equipment ordering and tracking, scheduling installations, storing garage door assemblies, performing installations and, finally, collecting payment.

Neptune wanted to be able to generate invoices from the MS Access application and asked our team to develop a proposal for doing that work.

After careful analysis, we advised against this plan. MS Access was not designed to handle bona fide accounting work. Certainly, we could modify it to generate invoices; however, it would provide no general ledger or summarization functions. If the company achieved even a fraction of their desired growth, the work would be virtually a throw-away. We recommended that the client purchase QuickBooks accounting software, which could

accommodate their needs for a lot less money than the work Trinity would have performed on the MS Access application. This would give Neptune’s management true accounting functionality and replace the old application’s contact database.

In the course of working through this issue, our client revealed that he was concerned that the current workflow processes would not support the increased volume of work that would be generated by his growth strategy. Even with the current level of activity, he lacked the ability to get a complete picture of what was going on in the company at any given moment. He knew that automation was the solution. However, because the growth hadn’t happened yet, he didn’t feel he could afford to make wholesale changes.

The Trinity Solution

We worked with our client to fully understand his current business and his plans for growth. We considered his budgetary constraints as well as the human factors involved, namely how to ensure that all employees embraced the changes we would propose. Our solution delivered improved workflow and processing in the areas of communication, accounting, and operations. We segregated our proposed work into discrete units so that our client could implement (and pay for) changes all at once, or in smaller, more affordable bites.

The components are:

➤ **QuickBooks Accounting Software**

This technology will fully automate the accounting and finance functions, delivering improved fiscal reporting and oversight. It also will deliver improved contact management and will allow Neptune Door to retire their legacy MS Access application.



➤ **Upgraded E-mail Infrastructure**

The client had been using dial up e-mail. Our solution included DSL, Microsoft Exchange Server, and Microsoft Outlook to deliver faster, more efficient and reliable communication within the company and with clients.

➤ **Automated Workflow System**

Prior to this implementation, when a customer called to inquire about the status of an order, the answer could be in any one of many paper files or in the Access database. The Trinity solution used the client's new IT infrastructure consisting of MS Small Business Server, with its built-in MS Exchange, and MS Outlook, to develop and implement an automated workflow system using customized workgroup task lists. Now an authorized employee can determine the status of any job in seconds. They can advance any job to the next stage with convenient drop-and-drag technology. This innovative use of technology delivers sophisticated functionality at a very reasonable price.

The Outcome

For budgetary reasons, our client opted to implement the E-mail upgrade and the Automated Workflow System first. He plans to implement the QuickBooks component in the near future.

Today, Neptune Door's CEO is enjoying his new-found ability to obtain a snapshot of his company's operations at any given point in time. His employees are enjoying increased productivity and reassignment to more interesting tasks. Most important, Neptune's customers are benefiting from more responsive service and easier communication with their garage door vendor.

When QuickBooks is added to the mix later this year, our client will be able to keep his finger on the pulse of his company's finances and operations, easily scale workflow to meet increased sales, and meet his business goals.

