



CASE STUDY

Jackson & Jackson Refrigeration Pty Ltd Allowed a mechanical contractor to achieve 242% growth with less than 50% increase in administration staff.

Overview

Country: Australia

Industry: Mechanical Contractor

Scenario

Company needed a software solution for achieving profitability on service calls and contracting, invoicing customers quickly, managing maintenance contracts and ensuring the accuracy of financials.

Software Used

WennSoft Job Cost, Service Management Series, and Microsoft Dynamics® GP

Benefits

- Allowed company to achieve 242% growth with less than 50% increase in admin staff
- Improved invoicing
- Reduction in data-entry
- Increased efficiency

About Jackson & Jackson Refrigeration Pty Ltd

Jackson & Jackson Refrigeration Pty Ltd is a mechanical contractor based in Innisfail (Far North Queensland), Australia, which provides professional sales, installation, service and repair of refrigeration, air-conditioning and electrical services. It started as a father-son business with a couple of vans and some basic tools and has evolved into a company that employs around 50 people.

When Bob and Jeff Jackson started the company, they were primarily subcontractors to larger companies. They steadily built their client work and added a few staff members. Within five years the company became so successful that it was purchased by a larger concern and all the management and staff joined the new company to help run the business. This new company invested in infrastructure including computerizing operational reporting systems.

In December 2006 the business underwent a management buy-out. A new company was formed called Jackson & Jackson Refrigeration Pty Ltd with a number of shareholders, all of whom worked directly within the business. The original owners, Bob & Jeff Jackson, are amongst the current shareholders. The business is currently undergoing a major expansion program to meet the increased demand for refrigeration, air-conditioning and electrical services in the Cairns to Cardwell and Atherton Tablelands region of Far North Queensland.

Scenario

Success for a mechanical contractor like Jackson & Jackson Refrigeration Pty Ltd depends on a variety of factors: achieving profitability on service calls, invoicing customers quickly, managing maintenance contracts and ensuring the accuracy of financials.

When the firm began, they managed all these processes manually. As the company was absorbed by larger entities, all the processes began running through a business software system, which showed the management team how important computer technology and software systems could be in allowing the company to grow and become systematized.

According to Mr. Jeff Jackson, Managing Director, previously utilised software seemed to be better suited to large corporate operations. What Jackson & Jackson Refrigeration Pty Ltd required was a system that captured beneficial information for the 'service team'.

The Solution

When the management team underwent the buy back of the company, they realized that having an effective business-software system was critical to their future success. Jackson & Jackson Refrigeration Pty Ltd selected WennSoft as its business management solution, because it is specifically designed for their industry. Jackson & Jackson Refrigeration Pty Ltd dealt with consulting company, Praxa, to configure and implement the system. Praxa had extensive knowledge of the HVAC industry and was able to get the company's Wennsoft package operational.

"WennSoft is a great system for mechanical contractors. It's comprehensive and has allowed our business to grow," said Managing Director, Jeff Jackson. "We need in-time accurate reporting of financial information and WennSoft is assisting in the facilitation of this process. We can follow a job's status from the time a customer request comes in, through invoicing and payment."

Significant growth, minimal admin increase

During its first year of operation, Jackson & Jackson Refrigeration Pty Ltd expected to achieve revenue of \$3.5 million. They surpassed this figure, taking in approximately \$9 million. WennSoft is attributed to assisting this growth without adding a significant amount of administrative support.

"WennSoft was integral in helping us outpace our revenue projections and achieve growth of 242% while our admin staff increased by less than 50%," said Managing Director, Jeff Jackson.

WennSoft helps the company by doing much of the work that would have to be done manually, like manipulating data, tracking information, reviewing spreadsheets, creating invoices and doing payroll. All Jackson & Jackson Refrigeration Pty Ltd needs to ensure is that the data is entered into the system correctly.

"The industry specific software WennSoft offers has assisted greatly in helping us achieve enormous growth," said Mr. Jeff Jackson.

Managing Cash Flow

With the growth experienced, maintaining positive cash flow has been and continues to be essential. WennSoft helps with this by managing the company's activities, particularly with creditors and debtors. WennSoft helps them keep a close eye on customer accounts by providing reports outlining receivables and monitoring due dates.

Jackson & Jackson Refrigeration Pty Ltd are utilizing a purchase structure in WennSoft that enables reporting of outstanding costs to prevent sending incomplete invoices. The system helps keep track of items that have been purchased for jobs. It tracks what items have been sent, when the items have arrived and when the items have been paid for.

"This saves us time and ensures that everything associated with a job is billed," said Mr. Jeff Jackson. "We don't have to look through folders for paper copies of purchase orders to try to determine all that's been purchased for a particular job."



About WennSoft

WennSoft, a Microsoft Gold Certified Partner, provides innovative business management solutions for public and private sector organizations focused on project management, field service and equipment/fleet management.

WennSoft services include assessment, training, implementation and go-live support. With more than a decade of experience in delivering superior applications in the field service and construction industries, WennSoft is the solution provider of choice.

Jackson & Jackson Refrigeration Pty Ltd is able to produce timely invoices sent to customers within a week or less, which aids cash flow.

Overall, Jackson & Jackson Refrigeration Pty Ltd is very happy with Wennsoft as a customized business operating system.

