

Greentree helps Australian plumbing company tap into business opportunities and workflow efficiencies

Since maintenance scheduling was integrated with CRM and Financials, dozens of plumbers at Gerrard Murphy Plumbing (Murphy Plumbing) are happily stemming the flow of water instead of drowning in a sea of paper. Informed management are now spending more time “managing the possibilities” which have come to light as a result of better access to and greater visibility of organisational data.

The 80/20 rule: redefined

As a general rule, many businesses generate about 80% of revenues from 20% of their customer base but family owned and operated business Murphy Plumbing has come-up with a new spin on the old adage - the 40/80/60 rule. Maintenance contributes 40% of sales whilst construction contributes 60% however maintenance, produces a whopping 80% of the paperwork and administration. Under the old system, it was taking 2 weeks to get 300-400 invoices



CUSTOMER
Gerrard Murphy Plumbing



INDUSTRY
Building & Construction



LOCATION
Australia



GREENTREE PRODUCT SUITE
Greentree Business Management Suite, CRM, Asset Management, Maintenance, Job Cost

Business Benefits >

- Integration of CRM with maintenance and financials removes 4 manual tasks from the quote to job to invoice process
- Single data entry point removes the need to re-key data
- Automated conversion of quote to job to invoice ends the month-end bottle-neck as invoices turned-out in 3 days instead of 2 weeks
- Faster production of invoicing and tighter credit control reduces number of days outstanding by 1 week
- The scheduling of maintenance becomes a 'set and forget' process with use of dates, times & alerts
- Creation of customised Service Request & Maintenance forms with links to MS Word improves the quality of information and control of the maintenance process
- Link to MS Outlook improves internal communication and reduces the duplication of effort
- Thousands of dollars saved in printing and publishing costs since integration removes the need for forms in triplicate
- Automation of key processes produces time savings of an estimated 30%
- Greentree partner key driver in 'tidying and tightening' key processes
- Flexibility to manage the assets of external business interests – no 3rd party systems needed
- Management of 'idle time' helps smooth cash flows
- Budgeting data facilitates more accurate forecasting for strategic planning
- High visibility of data, reporting and scalability provides sound platform for future growth
- Overall improvement in the flow of business information

“Greentree’s Maintenance module enables us to basically, ‘set and forget’ service contract or maintenance scheduling tasks – this alone, has reduced our administration time by at least 30%. We’ve also saved thousands of dollars in paper & printing with major improvements in the flow and accuracy of information. Plus, there’s the feel-good factor of saving a few hundred trees.”

Mark Murphy, Finance Director, Gerrard Murphy Plumbing

out each month, which Murphy Plumbing Finance Director, Mark Murphy explains “was clogging-up the Accounts Receivable process, not to mention the implications for cash flow.”

With many manual processes and a disconnected maintenance scheduling and financial process, Mark says what he envisaged was a central focus around CRM to enable service requests to be automatically generated and populated with customer information so data wasn’t re-keyed. Basically, he wanted to improve workflows across the business starting with maintenance. This was the key driver for migrating to Greentree.

Automation reduces admin time and improves workflows

Previously, all data was manually coded to a maintenance or service request and the accounts staff needed to be “manually aware of multiple pricing for multiple customers” says Mark. If a customer accepted a quote it needed to be manually converted into a job, then an invoice which was the main cause of the invoicing bottleneck at month-end.

Nowadays, maintenance and service jobs are an integrated part of CRM which

provides a single data entry point from where information flows through the relevant Greentree modules – no need to re-key data and Greentree’s Price Book automatically pulls-in pricing. Maintenance is now an entirely proactive process where plumbers can enter all the information about a customer along with Scheduled Asset Maintenance, special requirements using Alert text, dates and times and basically, forget about it. A quote can be automatically converted into a job, then an invoice.

Mark explains how Greentree’s ability to provide a link to productivity tools such as MS Word enables additional notes to accompany a customised Service Request and Risk Assessment sheet. With full, editable and accurate information automatically populating relevant forms, quality & control are inherent parts of the maintenance process. Four manual tasks for each job have now been automated.

Smarter internal communications

CRM has further enhanced customer communications by enabling Murphy Plumbing to add notes to customer records which can be emailed via MS Outlook and shared across both the Residential and

Commercial areas of the business. This means that everyone has access to the same information which reduces errors, saves time and eliminates duplication of effort.

Cash-flow improvements

Faster turn-around of invoicing has positive direct impact on cash-flow and this has been further enhanced by a Debt Collection module which helps the company monitor outstanding debtors and keep much tighter control of the credit process. Management state that this has dropped a week off cash flows and cleared the invoice logjam. Invoices are now turned-out in 3 days instead of 2 weeks.

Tenacious Greentree partner

Mark speaks highly of the tenacious commitment of the local Greentree partner, who has worked as an integral part of the Murphy Plumbing team from the beginning. Since implementing Greentree, a number of key business processes have been “tidied and tightened” and the partner was the key driver of those improvements. Mark concedes that he wasn’t so inclined in the old system since there didn’t seem to be any real benefits but “the Greentree partner came up with some useful customisations

CHALLENGE >

Gerrard Murphy Plumber’s were battling a paper-war at month-end due to the manual processes required to produce invoices. This was causing delays getting invoices out to customers. Management required a central CRM hub which was integrated to all financial and job-related modules. It was envisaged this would automate key processes and improve work and cash flows.

SOLUTION >

Greentree’s feature rich Business Management Suit with CRM as the central hub for information flows; integrated with Asset Management, Maintenance and Job Cost to automate manual processes

RESULTS>

With the budgeting available in Greentree Financials, management now know how the business performed in the past and can now rely on their forecasting.

Management has the information to help guide strategic planning and decision making as well as have more efficient utilisation of resources.

High visibility of business data enables management to undertake other tasks such as managing the possibilities and growth.

“Greentree’s integration and specifically, our use of CRM as our information hub and single data entry point, has effectively automated workflows from end-to-end with significant savings in time and costs – we now spend time managing the possibilities Greentree has created for us.”

Mark Murphy, Finance Director, Gerrard Murphy Plumbing

which have made progressive, overdue improvements”.

Manage multiple external business interests within Greentree

Mark explains that although the core business is plumbing, part of the growth strategy is diversification and Greentree provides the flexibility to manage business interests outside of Murphy Plumbing.

Currently, he manages 16 commercial tenancies, 2 self-managed super funds and 2 Subway franchisees within Greentree. This effectively circumvents the need to purchase dedicated 3rd party systems and demonstrates Greentree’s value as a strategic Business Management tool as opposed to an accounting system.

From a reactive to proactive business management model

With CRM as the central hub for information flows, integrated financial reporting within Excel and the automation of manual processes, Murphy Plumbing now have something unfamiliar to monitor – idle time. Mark admits they had no idea what this was in the old system but Greentree enables them to allocate resource and capacity which has resulted in more efficient utilisation of resources.

With the budgeting available in Greentree Financials, management now know how the business performed in the past but most importantly, Mark says “we can now rely on our forecasting.” Management has the information to help guide strategic planning and decision making.

High visibility of business data enabled him to undertake another task he had little time for previously, managing the possibilities. As far as Mark is concerned, Greentree will provide a sound and scalable platform for growth well into the future.



ABOUT GERRARD MURPHY PLUMBING

Murphy Plumbing has over 40 years of expertise in Commercial, Industrial and Domestic plumbing and maintenance services and has built a reputation on its ability to deliver good old fashioned service.

ABOUT GREENTREE

Greentree International specialises in developing highly effective business management software solutions. The Greentree product has been developed by the authors of CBA, arguably the most successful business software package for small to medium sized businesses in Australia and New Zealand.

In choosing Greentree you are selecting a business system that will truly empower your organisation today and grow with you into the future. The Greentree Partner Network provides a highly skilled local support team that will ensure you achieve tangible business benefits. Greentree has also been recently recognised as a global ‘Rising Star’ by MIS magazine Australia.

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